

## Content Production and Personalized Demand Analysis of Customized Broadcasting Applications: A Case Study of Himalaya FM (Postprint)

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### Abstract

American media theorist Paul Levinson proposed a “tripartite classification” of contemporary media in *New New Media*, distinguishing between old media, new media, and new new media, and briefly elaborated their respective defining characteristics from perspectives including temporal positioning, user engagement, and content production. Within the category of old media, radio was characterized by fixed spatial and temporal positioning, with content production managed exclusively by professionals. Subsequently, through the transition from the first to the second generation of internet media, radio has undergone substantial transformations in communication technology, the roles of producers and consumers, and user consumption patterns. As media continues to evolve, particularly with the proliferation of smartphones, mobile radio applications—having transcended conventional communication paradigms—are further pursuing strategies of diversified content production and precise audience demand targeting across knowledge monetization, online listening, and offline experiential dimensions. This study adopts this evolutionary context as its research backdrop, focusing on an analysis of “Ximalaya FM,” China’s largest online audio sharing platform, and its transition from “broadcasting” to “narrowcasting” toward customized broadcasting, examining both content production mechanisms and personalized user demands.

### Full Text

#### Preamble

#### Content Production and Personalized Demand Analysis of Custom Broadcasting Apps: A Case Study of Ximalaya FM

**Abstract:** American media theorist Paul Levinson proposed a “tripartite theory” of contemporary media in *New New Media*—distinguishing old media, new

media, and new new media—briefly elaborating their defining characteristics from the perspectives of temporal nodes, user engagement, and content production. Broadcasting, as old media, was characterized by fixed spatial and temporal positioning, with content production managed exclusively by professionals. From the first to second generation of internet media, broadcasting has undergone tremendous transformations in transmission technology, the roles of producers and consumers, and user habits. As media continues to evolve, particularly with the proliferation of smartphones, mobile broadcasting apps have not only broken through traditional communication paradigms but have also pursued strategies for diversified content production and precise audience targeting in knowledge payment, online listening, and offline experiences. Against this research backdrop, this paper focuses on China’s largest online audio sharing platform, Ximalaya FM, analyzing its content production and personalized needs in the transition from “broadcast” to “narrowcast” to custom broadcasting.

**Keywords:** Custom broadcasting; Content production; Audience groups

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The emergence and development of new media technologies have fundamentally transformed how people access information. Traditional broadcasting can no longer meet audience demands, giving rise to custom broadcasting. This new form of broadcasting provides traditional media with expanded space and opportunities, particularly following smartphone popularization, which has enabled custom broadcasting to thrive. Listening anytime, anywhere, and according to personal preference has become another leisure option for mobile users, making customization, personalization, and diversification key trends in broadcasting’s development. As China’s largest audio sharing platform, Ximalaya FM launched its mobile client in 2013. According to official statistics, it has accumulated 470 million activated users to date, with 200,000 key opinion leaders actively using the platform and over 100 million audio content items. It offers more than 2,000 knowledge payment products. Data from *Analysys’ 2017 China Knowledge Payment Industry Development White Paper* shows that in 2017, Ximalaya FM accounted for 57% of the top-selling paid content platform distribution, while Qingting FM accounted for 9.0%, establishing Ximalaya FM as an oligarch in the knowledge payment industry. Current research on custom broadcasting primarily examines its characteristics, communication features, current status, development strategies, and impact on traditional broadcasting, with few studies approaching from the perspective of content production models and audience groups. This paper adopts a more specific approach, using Ximalaya FM as a case study to examine the PUGC production model of custom broadcasting and the importance of audience impressions and satisfaction groups for its development.

## 1. Custom Broadcasting Content Production Models

Due to limitations in transmission technology, traditional broadcasting operated on a point-to-mass communication model, a technical condition formed in an environment where media developed independently. Facing the impact of new media technologies, it quickly became a “weak medium.” To meet diverse audience demands, broadcasting began seeking new pathways, transforming from point-to-mass to point-to-point communication, giving rise to custom broadcasting known as online private radio stations. Based on different production models, custom broadcasting can be divided into two categories: The first is Professionally Generated Content (PGC), where content creators are primarily radio stations, television stations, and professionals. Program content sources mainly include four aspects: first, purchasing copyrights for premium content; second, cooperating with radio and television stations; third, inviting professionals or celebrities to record programs; and fourth, producing original programs. The greatest advantage of PGC is accurate control over program content and pacing. Platforms like Lazy Audio and Qingting FM adopt this model. The second model is PGC+UGC (User Generated Content), employed by platforms such as Ximalaya FM and Lychee FM. While UGC enhances user stickiness and interaction, the quality of uploaded programs varies significantly. In Ximalaya FM’s content production model, professionally generated content accounts for 40%, with user-generated content comprising the remainder.

## 2. Analysis of Ximalaya FM’s Custom Broadcasting PUGC Model

### 2.1 Creating Product Advantages Through Premium Paid Content

In 2015, the launch of the online expert consultation app “Zaihang” sparked a new wave of knowledge payment, after which Ximalaya FM began experimenting with “1% paid content.” In 2016, its first paid program *Good Speaking* achieved sales exceeding 5 million RMB on its launch day. On December 3 of the same year, the inaugural 123 Knowledge Festival generated 50.88 million RMB in sales, comparable to the first Tmall Double 11 shopping festival, marking a carnival for the knowledge industry. In 2017, the second 123 Knowledge Festival broke through 100 million RMB in sales. In the attention economy era, premium content helps people reduce the time cost of decision paralysis, making them willing to pay to save costs. Simultaneously, knowledge serves as social currency, making payment a possible consumption behavior pattern guided by cultural capital.

In Ximalaya FM’s premium content section, programs are categorized into history and humanities, parent-child and children’s content, personal development, audiobooks, business and finance, foreign languages, and live micro-courses. Ranked by play count, the most popular history and humanities programs are *Guo Lun: Guo Degang’s Commentary on Folk Culture History* and *Meng Man’s Appreciation of the Most Beautiful Tang Poetry*. Beyond engag-

ing and aesthetic content, audiences have high recognition of Guo Degang and Meng Man, which enhances their credibility as knowledge experts. The platform has also heavily invested in parent-child education content. According to the *2016 China Parent-Child Education Status Survey Report*, the primary issue in parent-child education is parenting anxiety. Consequently, in the premium content section, programs such as *Uncle Kai's Rhyme Enlightenment*, *Chinese History for Children*, and *Adventures of Shuke and Beita* have all exceeded 40 million plays, ranking in the top five. In personal development, programs like *Ma Dong and the Weirdo Team's "Good Speaking"*, *Kevin Tsai's 201 EQ Classes*, *Small Learning: Thinking Like Smart People*, and *Voice Coach Xu Jie: How to Develop a Good Voice* address the urgent need to improve emotional intelligence in our era's anxiety-ridden interpersonal relationships. Similarly, top-ranked programs in foreign languages, business and finance, and live micro-courses are predominantly practical, exhibiting clear utilitarian characteristics. Overall, Ximalaya FM's most-played content remains parent-child education, history and humanities, and personal development, followed by business and finance and foreign languages. In the long term, this focus on audience cultural capital accumulation distances itself from pure utilitarianism, representing a high-standard media survival guide and social responsibility.

## 2.2 Mobile Audio IP Fever—Star Celebrities and Platform Incubation's New Voice Plan

IP fever is an unavoidable keyword in cultural capital markets, encompassing game IPs, TV IPs, film IPs, and animation IPs. IP fever represents a win-win for content and capital. For example, box office revenues from *Journey to the West*-themed films over the past three years have exceeded 5.8 billion RMB, accounting for 5% of China's total box office during that period—for every 100 RMB generated by the film industry, 5 RMB comes from *Journey to the West*. Looking globally, virtually no other IP commands such massive market appeal. On January 11, 2018, Ximalaya FM hosted China's first internet audio industry IP ceremony, the Ximalaya Spring Audio IP Release, launching 20 super IPs at once, featuring celebrities like Guo Degang, David Wang, Meng Man, and Yang Lan, with future plans for a Ten Billion New Voice initiative. These top IPs will focus on creating original premium content, subsequently driving numerous audio content creators to build super IPs for the mobile audio industry. For instance, the top IP *Good Speaking*, co-created by Ximalaya FM and Migu Culture, broke 5 million RMB in sales on its launch day and has since exceeded 50 million RMB in total sales. Its 同名书籍 has sold 13,000 copies in a single day on JD.com, with over seven reprints, becoming the best-selling knowledge payment native IP.

As mobile audio IP fever attracts more users to join the New Voice Plan, they can have their personal radio stations while listening to numerous original audio programs. Ximalaya FM can not only attract premium content but also mobilize user participation enthusiasm, consolidating existing audiences while

attracting marginal groups. Currently, Ximalaya FM has 5 million hosts with an average daily usage duration of 128 minutes. This massive traffic dividend is closely related to mobile broadcasting's non-linear listening method and content ecosystem that aligns with audience information acquisition habits. The star celebrity plus platform incubation model's New Voice Plan will have practical significance for the entire IP industry. Future mobile audio IP formats will bring audiences more 玩法 and greater imaginative space.

Under the PUGC production model, any user can produce and upload audio, differing from traditional broadcasting and the strictly conditional access PGC model. After users upload content, the platform reviews and publishes it, providing more upward mobility for grassroots creators and endowing the platform with greater dissemination power.

### 2.3 Offline Knowledge Sharing and Experience Strengthening Human Connections

Ximalaya offline reading clubs rely on like-minded people across cities, using a book or premium course as the theme for joint learning, growth, and sharing. Basic formats include reading exchange activities, knowledge sharing, meet-and-greets with celebrities and outstanding hosts, and participation in reading festivals. A more distinctive format involves creating offline knowledge experience stores, such as Ximalaya's knowledge experience store entering K-Mall in 2017, which conducts diverse offline activities using Ximalaya's existing products and social features to achieve user interaction. These spaces will become gathering places for urban users in the future, generating scale effects. Most importantly, such urban learning spaces will serve as content production centers, cooperating with other commercial formats to provide users with more diversified experiences.

From the user perspective, the hope is to maximize knowledge improvement through reasonable investment. Ximalaya's online reading clubs have the largest content reserves, with members enjoying access to 365 daily book summaries, 31 columns, 2000+ audiobooks, and ad-free experiences. Communication between users in online reading clubs occurs in a virtual environment of comments and Q&A "hearing voices but seeing no faces," representing individual reception and reflection behaviors with weak user belonging and knowledge processing willingness, despite the existence of knowledge exchange groups. While non-linear listening methods facilitate user access, they can also be disrupted by uncertain external factors, affecting or interrupting communication. Offline knowledge experience stores also have drawbacks, but they offer advantages in time selection, topic continuity, and frequency. User communication willingness is stronger in physical environments, and disseminating knowledge through people is far more profound than disseminating knowledge through content alone, strengthening the connection between knowledge and human beings.

### 3. Personalized Needs Analysis of Custom Broadcasting Apps

Paul Levinson, representative figure of the media ecology school and “the Marshall McLuhan of the digital age,” proposed a three-part outline on the “human return” of communication media. The earliest concept of mass communication manufactured products for mass consumption markets, clearly separating the public and public sphere from the private sphere. Audiences were not only passive viewers and consumers but also abstractly characterized and artificially constructed. However, the adoption and popularization of new communication technologies and continuous functional integration gradually bridged the gap between public and private communication. Public communication has witnessed “personalization” or “individualization,” while “private” communication has become more public, widely sharing information with strangers.

Custom broadcasting has created more innovative development space for traditional broadcasting in content production, transmission carriers, and audience interaction. The focus lies in how to produce more premium content at the knowledge payment 风口, cultivate quality audience groups, or follow the cultural capital wave to create mobile audio IP fever, strengthen audience interaction, and revise audience media impressions, thereby fostering more positive media expectations for custom broadcasting. Questions remain about how Ximalaya FM, leading this trend, can achieve further breakthroughs, how those in the long tail can profit, and how to resolve issues of content vulgarization, homogenization, and copyright disputes.

#### 3.1 Audience Media Contact Behavior and Media Expectations

People engage with media to satisfy specific needs. Media contact behavior requires two conditions: first, the possibility of media contact—if such conditions are absent or obstacles exist, audiences will turn to other media; second, media impressions, or media evaluations, formed based on previous media contact experiences. Based on media content, people select specific media or content to initiate media contact behavior.

Regarding the possibility of media contact, audiences always consider factors that minimize their investment and effort. Therefore, if audiences choose a particular medium or communication method, the basic criterion is that the medium is simple to operate, readily available, and provides useful information. Fundamentally, this belongs to the utilitarian or functional category of satisfying one’s own needs. Regarding media impressions, these stem from audiences’ preference for network communication forms or specific media formats, thereby selecting an information acquisition channel or interpersonal communication method. Although “personal psychological factors” or emotional recognition are not excluded in this process, the most essential and profound root cause is “media” itself—audiences’ love for the medium. Traditional broadcasting has gained new development opportunities following smartphone popularization.

Custom broadcasting platforms like Ximalaya FM have launched mobile clients featuring non-linear listening methods, diverse program types, high program selection autonomy, premium original content, and role interchange between communicators and audiences, satisfying personalized needs and deepening media impressions of custom broadcasting, thereby enhancing expectations for this media format to varying degrees.

### 3.2 “Satisfaction Group” Audience Analysis

“Satisfaction group” audiences differ from “group or public” audiences in that they are defined by specific needs or demand categories, or by relatively consistent interests among people, rather than by shared social backgrounds. According to McQuail’s perspective, this results from media targeting specific consumer needs to produce and disseminate programs. As “satisfaction group” audiences, conscious demand stimulates corresponding supply. It is precisely because media provide specific content that specific consumer groups emerge. On Ximalaya FM, audience preferences for particular program types form groups, such as the “fan group” formed by audiences of the program *Drifting Everywhere* by “Beef Without Meat,” which strengthens audience participation and stabilizes specific listener groups. However, if media produce programs to satisfy specific consumer needs, content quality will be uneven, and much high culture will degenerate into vulgar topics. While vulgar content may attract audiences in the short term, it is not conducive to cultivating quality audiences or the long-term development of broadcasting.

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