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Four Highlights and Two Trends of New Online Audio-Visual Media (Postprint)

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Date: 2023-10-08T00:00:00+00:00

Abstract

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Full Text

Preamble

Four Highlights and Two Trends of Network Audio-Visual New Media
By Zhu Yannan, Director of the Development Research Center, National Radio and Television Administration

Editor's Note: On October 10, at the First China New Media Development Annual Conference, Zhu Yannan delivered a keynote speech titled "Firm Confidence: Writing a New Chapter in Network Audio-Visual Development in the New Era." Drawing from the China Audio-Visual New Media Development Report, he identified four key highlights and two major trends in the sector. This article excerpts key portions of that speech for our readers.

First Highlight: Network Audio-Visual New Media as the Frontline Main Platform for Ideological Publicity

Network audio-visual platforms have become critical frontlines for ideological publicity work and represent the largest growth driver for China's socialist cultural undertakings and industries. First, under proactive government guidance through production planning, awards and recognition, and financial support, the industry has produced numerous high-quality works that promote mainstream

values and positive energy, elevating the orientation and quality of original on-line content. Second, the “Homepage, First Screen, First Item” initiative has played a crucial guiding role, creating a robust matrix of platforms for thematic publicity on current affairs, policies, achievements, and exemplary models. Third, commercial streaming platforms such as iQiyi, Tencent Video, and Youku have actively aligned with mainstream media, effectively expanding the reach and influence of positive public discourse.

Second Highlight: Robust Industry Vitality and Strong Momentum

Since 2017, the network audio-visual sector has seen significant improvements in user scale, creative capacity, and market influence, with continued progress in mobile optimization, quality enhancement, and ecosystem development. The industry is maturing rapidly and expanding its influence in new cultural business formats and consumption models.

First, market demand remains strong. From 2012 to June 2018, China’s online video user base grew from 349 million to 609 million, reaching 76% penetration and maintaining its position as the leading entertainment service online. Mobile internet has become the primary distribution channel, with 788 million mobile netizens accounting for 98.3% of total internet users as of June 2018.

Second, the content industry is experiencing rapid growth. In the first half of 2018, 108 new web dramas launched with total views of 37.9 billion, a 45% year-over-year increase, featuring expanded themes and more diverse, pluralistic content. The period saw 194 new web variety shows with 30.8 billion total views, a 73% increase from 2017, with programs deeply exploring vertical content in youth-oriented domains such as music, food, technology, and gaming; reality shows, idol development programs, and talent competitions proved particularly popular. Meanwhile, 730 new web films launched—a nearly 40% decrease—but achieved 3.29 billion total views, up 6.5% year-over-year. While quantity declined, overall quality improved significantly in both ideological depth and artistic merit, with emotional and comedy genres gaining popularity.

Third, business models are maturing and market scale continues to break records. Content monetization through subscriptions has matured, with the online video market growing from approximately 9 billion yuan in 2012 to 95.23 billion yuan in 2017, representing an average annual growth rate exceeding 50%. In 2017, network audio-visual program service revenue reached 14.298 billion yuan, with user payments accounting for 78.86% and copyright revenue for 15.38%. Platform ecosystem development is accelerating, with video e-commerce, film-game interaction, and derivative product development showing promising results.

Third Highlight: Comprehensive Strengthening of Industry Management Innovation

First, in the domain of private network and targeted broadcast audio-visual services, regulations have standardized the development of new services including IPTV, private network mobile TV, and internet TV. IPTV subscribers grew from 22.5 million in 2012 to 145 million by July 2018, representing nearly 50% annual growth. The internet TV industry, centered around seven integrated platforms and fifteen content service platforms, has developed steadily, generating over 2.6 billion yuan in advertising revenue and 1.3 billion yuan in membership fees in 2017.

Second, the content management system for network audio-visual programs has been further improved. A comprehensive management framework now covers original online content, imported programs, live broadcasts, and social media content, enabling timely responses to new situations, issues, and business formats while guiding various new formats onto healthy and orderly development tracks. Enforcement actions against illegal websites disseminating harmful content have prompted widespread and thorough cleanup efforts across the industry, with serious accountability measures curbing the spread of online “pan-entertainment” tendencies.

Fourth Highlight: Positive Results in Media Convergence Development

First, the establishment of the new China Media Group has created a national-level broadcast media convergence platform, enabling central media to achieve substantial breakthroughs in building new media conglomerates. Second, provincial and some municipal broadcast media have actively pursued convergence models tailored to local conditions, with diverse cross-sector, cross-regional, and cross-level integration patterns gradually taking shape. Third, county-level broadcast institutions have explored the development of county-level media convergence centers suited to their circumstances, accumulating valuable experience. Fourth, convergent reporting on major themes has successfully transformed abstract concepts into tangible, accessible expressions for audiences, continuously producing innovative and outstanding works. Fifth, international communication through converged media has achieved new progress, with CGTN and China Radio International leveraging new media integration to tell China’s stories and amplify China’s voice more effectively, enhancing international influence through targeted, differentiated strategies.

Two Future Trends

We anticipate two major trends in the future development of network audio-visual and new media:

First, the development environment will be further optimized, with new technologies and applications continuously generating new business models and for-

mats.

Second, the content industry is moving to center stage in the internet ecosystem, with standardization, premiumization, and ecologicalization becoming dominant trends. Short video content will serve as the breakthrough point for accelerating the establishment of a content ecosystem on the internet.

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

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