

# China's Variety Show Market, Marketing, and Optimization

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**Abstract.** In the fierce competition in China's variety show market, online self-produced variety shows characterized by the innovative integration of content creation and marketing strategies in the digital era have developed rapidly. This study comprehensively re-examines the content production and marketing strategies of Chinese variety shows. This study adopts a case study analysis method, taking China's self-produced online variety shows as the main research object, and selects representative popular programs as analysis cases. The core purpose of this article is to discuss how online variety shows can use the native advantages of the Internet to innovate marketing methods. The study mainly found that the focus of current variety shows has shifted to narrower, youth-centered content. At the same time, in terms of marketing, the current program adopts cross-platform promotion, using the connective tissue of social media to expand influence and audience investment, thereby deepening audience relationships and cultivating communities around program content. Ultimately, the research conclusion shows that audience segmentation, cross-platform promotion, and real-time interaction are not only trends, but also necessary strategies to survive and develop in the increasingly segmented variety show market.

## 1 Introduction

Variety shows have become a significant form of entertainment in people's lives, increasingly gaining popularity and attention in the era of social media. Some scholars even point out that China has entered an all-encompassing era of variety entertainment [1]. Around 2014, online video service providers began collaborating with film and television production entities or individuals to create and broadcast web-based variety shows, primarily through online platforms [2]. These self-produced web variety shows gradually became a new growth area and focus for major video websites. Marked by the rapid popularity of iQIYI's debate show "Qipa Shuo" upon its release, 2014 was dubbed the "inaugural year of self-produced web variety shows" [3]. In recent years, leveraging the vast platform of the internet, major Chinese video platforms have started to scale up their foray into variety show production, ushering in the era of "major self-production." iQIYI, Tencent Video, and Youku, as the top tier of web variety platforms, have produced a series of popular self-produced web variety shows such as "Roast," "Please Take Care of My Refrigerator," "Mars Intelligence Agency," "This Is Street Dance," "Produce 101," and "Idol Producer" [4]. In just a few years, web-based self-produced variety shows have developed rapidly, evolving from their initial state of limited quantity, single format, and rough content to now boasting a multitude of types, and production that is more professional and sophisticated. They have attracted most of the television variety show audience, continuously

impacting traditional television variety shows and directly influencing the production and broadcasting environment and new development directions of China's variety show market [1].

In summary, self-produced web variety shows, as a relatively concentrated concept, are the result of the combination of television variety and web-based self-production. Web variety shows refer to variety shows produced by video websites or in collaboration with other production companies, essentially still representing a form and style of variety entertainment [5]. In terms of broadcasting platforms, video websites are the primary medium, but some web variety shows have also collaborated with television [1,2,3]. Although relatively new, they have had a significant impact on China's media industry in recent years. Chinese web-based self-produced variety shows are both a continuation and transformation of television variety shows, thriving in the more open and inclusive environment of the internet [6]. With fewer production and broadcasting restrictions, competition is fiercer, and innovation is the only path to survival. Especially in recent years, as competition among Chinese web variety shows has intensified, numerous innovative self-produced web variety shows have emerged victorious, garnering significant audiences, high view counts, and attention [6]. Therefore, this paper conducts case studies on certain "phenomenal" web variety shows to explore the innovations in China's web variety show market and its development shortcomings, aiming to provide developmental insights. Hence, the research objectives of this paper are as follows:

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(1) To systematically review and study the current development of web variety shows in the new era of China, clarifying the audience demand and trends of the era faced by the variety show market from a macro perspective;

(2) To organize and analyze China's web variety shows, specifying the marketing strategies of variety show development;

(3) To analyze the current issues of variety shows and propose suggestions for the optimization of marketing strategies.

## 2 Literature review

At the end of the 20th century, the development of computers and network communications accelerated the convergence of media, accompanied by changes in media content platforms and protocols. In the new media era, the characteristic of China's variety show market is that web variety shows have overtaken traditional media with popular topics, vertical interaction modes, and flexible broadcasting models, while television variety shows remain relatively conservative in program production thinking, production technology, and promotional strategies, struggling to keep up with the trends and entering a phase of low-level competition [2,3,5,6].

Several Chinese scholars have begun analyzing representative web-based self-produced variety shows to uncover the deep-seated reasons for their rapid development, their current state, and issues arising during their over-speedy growth. Liu 's reviews the development process of Chinese video websites and points out common issues such as copyright disputes and homogenization, illustrating from iQIYI's successful case that adopting a differentiation strategy is essential for survival in the development torrent [7]. Professor Chen emphasizes on deep content cultivation: positioning must be unique, content must pursue differentiation, and it should enhance humanistic connotations [8]. In production mode, it explores the separation of production and broadcasting, attempts large-scale productions, and seeks external output to achieve standardized production. In terms of profit models, it actively explores pay-per-view and promotes value-added interaction [8]. Some scholars have conducted research on web-based self-produced variety shows using specific programs as case studies. For example, Lu chose Tencent Video's "Mars Intelligence Agency" for a case study, conducted in-depth interviews to understand the program's planning, production, and operational models, and summarized the program's positioning, structure, and innovative content, noting that current variety shows have more precise audience targeting and stronger interactivity, but still face issues of originality and homogeneity [9].

Regarding the characteristics and forms of web-based self-produced variety shows, scholars have mostly analyzed various aspects and stages of the programs, including some innovative forms and content. Zhao and Michael analyzed two main characteristics of web-based

self-produced variety shows under the context of big data: precision in dissemination strategies and personalization in content production. The article emphasizes that only by fully and effectively utilizing big data can one prevail in an increasingly complex competitive environment [10]. Yan showed profound internet thinking in both content selection and operational logic, focusing on the cultural perceptions of the internet-native generation, incorporating data thinking throughout the production and broadcasting process, and valuing audience experience and feelings [11].

Zhang analyzes the narrative features of web variety shows from the perspective of media arts, noting that everyday narratives make web variety shows more approachable to audiences; topical narratives can spark discussions among viewers, thus generating interest; and personalized narratives allow distinctive web variety shows to stand out, with the integration of internet thinking resulting in vastly different forms from traditional television variety shows [12]. Other scholars have highlighted several distinctive features of web variety shows, outlining the form characteristics of web-based self-produced variety shows. Wang compared web variety shows with traditional variety shows, identifying several representative characteristics of web variety shows such as strong interactivity, flexibility, a more lively overall style, and a greater diversity of program types [4].

In summary, numerous scholars have made contributions to the study of China's variety shows. These studies clearly explain from a micro perspective how variety shows in China's new media era have captured market environments and audience preferences. Additionally, scholars have focused on the most crucial aspects of program content, form, and production, conducting detailed research from various dimensions. Moreover, in the unique environment of online dissemination, not only content but also marketing and promotional strategies for media products are of significant interest in the industry. Therefore, how Chinese web-based self-produced variety shows formulate their marketing strategies has also been a focus of scholarly research, inspiring this paper to conduct a deep analysis of innovations in communication methods and marketing strategies for this type of variety show.

## 3 Research methods

This paper primarily utilizes the case study method [13]. In China's variety show market, web-based self-produced variety shows have experienced explosive growth in recent years, with a large quantity and many shows of similar types.

The main focus of this paper is on Chinese web variety shows, starting with the collection, organization, and analysis of relevant data and materials to outline the current state of China's web variety show market. Next, by integrating the open and personalized characteristics of the internet environment, it selects representative and

typical web variety show marketing cases for study. Coupled with the current development status of web variety shows, it offers reflections and analyses, aiding in clarifying the advantages and disadvantages in their marketing strategies and providing insights for their own or similar shows' future development.

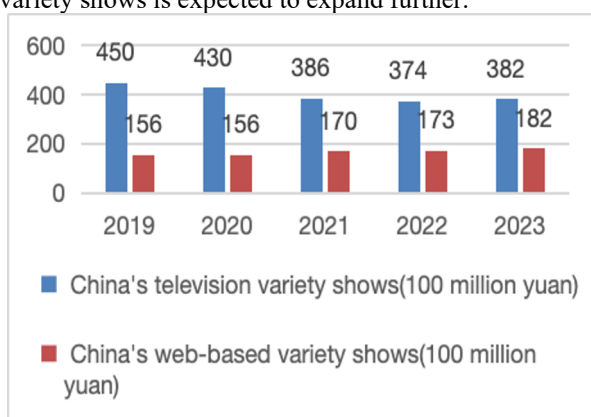
Positioned in the rapidly evolving internet environment, this paper conducts in-depth analyses of shows like "The Roast," "Qipa Shuo," "Mars Intelligence Agency," and "Produce 101," extending to the strategic study of their web variety show marketing. This approach is somewhat novel and practically significant, as it helps us make certain judgments about the development direction and trends of web variety shows. On the other hand, it supplements and complements research on web variety show marketing strategies, enhancing and perfecting previous studies.

## 4 Market analysis

### 4.1 Current development status of china's variety show industry

#### 4.1.1 Market size

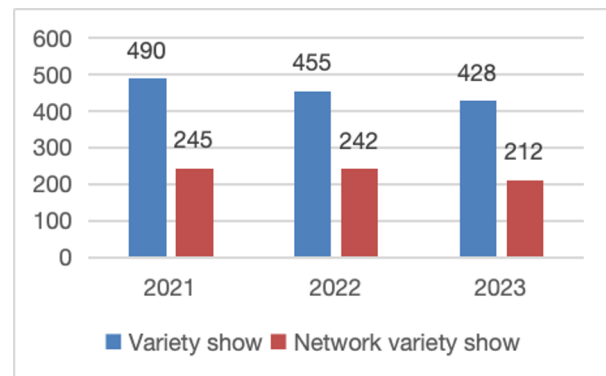
As shown in Figure 1, Data indicates a declining trend in the market size of China's television variety shows, dropping from 45 billion yuan in 2019 to 38.2 billion yuan. However, the market size for web-based variety shows has shown an upward trend, rising from 15.6 billion yuan in 2019 to 18.2 billion yuan by 2023 [14]. As the Chinese internet film and television industry continues to develop, the market size for China's web variety shows is expected to expand further.



**Fig. 1.** Statistical chart of variety show market scale changes in china from 2019 to 2023(Original).

#### 4.1.2 Number of premieres

The data in Figure 2 shows a decrease in the number of variety shows broadcast in 2023 compared to the previous two years, with a noticeable decline in the number of self-produced shows by major platforms. In 2023, the number of new variety show premieres in China was 428, a decrease of 27 from 2022. The number of web variety shows launched was 215, down by 28 from 2022 [14].



**Fig. 2.** Statistical chart of online variety and network variety in china from 2021 to 2023(Original).

#### 4.1.3 Key variety shows

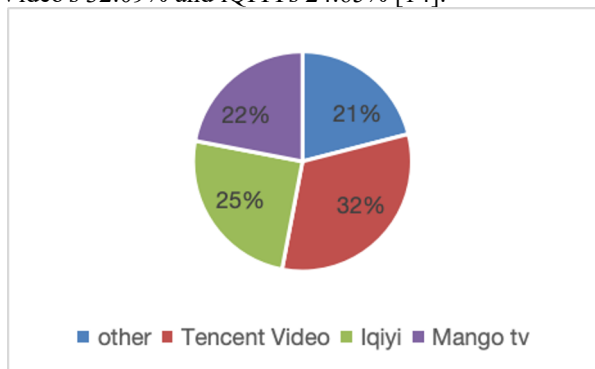
Idol audition programs like "Produce Camp" and "Youth With You" remain the hottest variety show genres. Once the audition themes conclude, viewers' attention is expected to disperse again to other genres of programs, such as "Back to Field" and "Ace vs Ace," among other outstanding variety shows in Table 1.

**Table 1.** 2021 key variety show overview.

Rank	Variety Show	EntGroup Broadcasting Inde	Broadca sting Platform
1	Produce Camp	70	Tencent Video
2	Youth With You	68.4	iQIYI
3	Call Me By Fire	65.1	Mango TV
4	Back to Field	65	Mango TV
5	Street Dance of China	63.2	Youku
6	Ace vs Ace	62.8	Tencent Video,iQIYI Youku
7	The Detectives Adventures	62.1	iQIYI
8	Heartbeat Offer	62	Tencent
9	Sisters Who Make Waves	61.5	Mango TV
10	Talk Show Conference	61.5	Tencent

#### 4.1.4 Competitive landscape of china's variety show market

The online video industry landscape has improved, with Mango TV's market share in web variety shows continuously increasing. According to the average monthly active user scale in 2022 in Figure 3, Mango ranks in the second tier. EntGroup data reveals that in 2022, Mango TV's exclusive web variety shows accounted for 21.86% of the total, trailing only Tencent Video's 32.09% and iQIYI's 24.65% [14].



**Fig. 3.** 2022 competitive landscape of china's web variety show broadcasting platforms(Photo/Picture credit :Original).

#### 4.2 Marketing strategies for variety shows

The competition among current variety shows is fierce. Web-based self-produced variety shows, immersed in the vast ocean of internet information, can tap into big data to understand the frequency, duration, and timing of users watching online videos. This allows for an analysis of user characteristics and even predictions about target audiences and their preferences, which greatly facilitates the planning and marketing of these shows.

Firstly, targeting niche audiences for narrowcasting. Traditional TV programs cater to family units with a broad age range that cannot be segmented, a factor dictated by television's household nature. In the internet age, audiences freely receive content individually, often through personal smart electronic devices. Therefore, the audience for web-based self-produced variety shows are individuals, primarily the youth. According to the 44th "Statistical Report on Internet Development in China" released by the China Internet Network Information Center (CNNIC) in August 2019, as of June 2019, China's internet users reached 854 million, with an internet penetration rate of 61.2%. Looking at the age structure, internet users aged 10-39 account for 65.1% of the total, with those aged 20-29 comprising the largest group at 24.6%, underscoring that the young demographic remains the main user group of the internet [15].

Facing the overall youthfulness of China's internet users, video websites are clear about their audience's location. Hence, China's web-based self-produced variety shows are increasingly developing towards niche and narrowcasting.

Currently, web-based self-produced variety shows are characterized by youthfulness and individuality, targeting post-85s, post-90s, and even post-00s native

internet users. Everything from the show's topics, language style, and video editing to guest selection is tailored to fit these groups' preferences. For instance, "Qipa Shuo" chooses debate topics that are widely followed by the youth, leveraging topic influence to drive the show's fame, precisely targeting such audiences, and engaging in debates in a light-hearted and humorous manner, combining entertainment with knowledge, allowing the audience to gain insights into life while enjoying the show [4]. To a certain extent, web-based self-produced variety shows are internet cultural products custom-made for the youth, hence precisely targeted, segmented, and individualized communication strategies are an inevitable trend for the innovative development of pure web variety shows.

Secondly, cross-platform promotion. Web-based self-produced variety shows are born in the internet environment and naturally have open channels for dissemination. Compared to traditional television's fixed receivers and platforms, web-based variety shows enjoy the great convenience of the internet age, achieving inter-platform connectivity in marketing and promotion. They expand their channels comprehensively through social media with large audiences like Weibo and WeChat; in terms of terminal reception, they achieve cross-screen broadcasting across PCs, mobile phones, tablets, and mobile TVs with the rapid development of digital technology [3,11,16]. These promotional methods, relying on multi-platform promotion and cross-media broadcasting, reflect the marketing strategy innovation of web-based self-produced variety shows in the internet ecosystem.

The largest audience group for web-based self-produced variety shows is the 18-29 age group, which highly overlaps with the audience of social media platforms like Weibo, WeChat, and forums [4]. Under the intense competition, video producers realize that promotion through their video website platforms alone is insufficient. Therefore, by causing widespread discussion on social media platforms and drawing the attention of the target audience with a strong presence, web-based self-produced variety shows have become a necessary means to win in the competition. Weibo, with its massive base of young users, is a battleground for promotion by various video programs, and its more open environment for public opinion facilitates rapid and widespread influence for the shows. Nearly all major web-based self-produced variety shows have official Weibo accounts, where they continue the show, post behind-the-scenes content, graphic explanations, initiate topic discussions, and interact with guests, amplifying their influence for a broader promotional effect [2]. For example, "Qipa Shuo" posts topics on Weibo for each episode and tags participating guests, sparking discussions among fans and other users, leveraging large V's and massive fan bases for a viral spread of influence [11,16].

Apart from Weibo, QQ, WeChat, Tieba, forums, and other social media platforms with large user numbers are important promoters of web-based self-produced variety shows. For instance, "The Roast" show team set up an official WeChat public account: Roast, which includes

essential knowledge points from "meeting records," "Just Spit it Out," "Roasting on Site," links to past episodes, and more, increasing fan interaction with the show. Additionally, the show team established WeChat fan groups, calling on fans to grab tickets on the public account, and developed "laughter" mini-programs to purchase offline theater tickets, greatly increasing the show's popularity and expanding its influence [17].

Thirdly, real-time interaction. Web-based self-produced variety shows fully utilize their internet genes to delve into the immediacy and openness of interaction, innovatively creating interaction modes, and deepening their connection with the audience [3,4,17].

In traditional TV variety shows, audiences interact with the program through text messages, phone calls, etc., with limited participant numbers and not strong timeliness. In web-based self-produced variety shows, instant interaction is easy; audiences can use handheld voting devices to vote live or vote online, deciding the fate of contestants [16]. Audiences watching online can participate in real-time through bullet comments and touchscreen voting, even affecting the content and progress of the show [16]. For example, in "Qipa Shuo," audiences on-site watch debates and vote for each team using handheld voting devices, directly determining the outcome. Voting is not one-time; audiences can change their votes based on debaters' performances until the end of the debate. Thus, the live fluctuation of red and blue votes directly impacts contestants psychologically, with the audience not just spectators but also judges, deciding the outcome with the mentors, creating a synchronous relationship with the contestants. Audience voting has also appeared in the popular idol development variety shows in recent years, like Tencent Video's "Produce 101," where all online audiences can participate in voting through the video platform's special page during the show's broadcast, with the final ranking determined by the voting leaderboard [17]. Audiences mainly use computers, smartphones, tablets, and other touch-sensitive smart devices to watch online programs, making participation in voting exceptionally simple. This real-time interaction mode, combined with mobile smart terminals, not only engages audiences in watching but also makes the program's interaction more immediate and effective [17,18].

Another collective form of program interaction is the bullet comment. Bullet comments, a technical method that can only be utilized through online platforms, have become a unique interactive mode for web-based variety shows. Bullet comments allow netizens to freely open a video on a website and, while receiving audio and visual information, express their feelings or comments through text input, either with real names or anonymously, displayed on the screen. The interactivity and synchronicity of bullet comments largely satisfy the interaction between the audience and the program and among audiences, alleviating the audience's sense of isolation and increasing their participation in the show. Bullet comments turn the program into a virtual community where audiences interact synchronously, hence most web-based variety shows use bullet comment technology. "The Roast" is a show that truly utilizes

bullet comments, with audiences often using them to roast guests and hosts. For example, viewers roast host Zhang Shaogang as shameless, using a high frequency of "shameless" to cover his face on the screen with dense bullet comments; participate in roasting with 666 or not 6; and use bullet comments to roast Li Dan's unsold books, Wang Jianguo's homophonic jokes, and more [6]. Convenient, real-time bullet comments allow audiences to participate in the program interactively and solidify their synchronous relationship with the show.

## 5 Conclusion

In summary, this study offers a novel reflection on content production and market marketing of variety shows from a perspective of all-media.

This research focuses on Chinese web-based self-produced variety shows. Initially, after deliberating on the topic, it elucidates the background, purpose, and methods of this research. Subsequently, it outlines the development trajectory of web-based self-produced variety shows and selects some representative popular programs as analytical cases. Furthermore, the paper mainly discusses how web-based self-produced variety shows seize the advantages of the internet's native environment to innovate in interaction methods. Then, starting from the aspects of the audience, promotional platforms, and advertising methods, it analyzes the innovations in the marketing strategies of web-based self-produced variety shows one by one.

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