

Analysis of the Status and Trend of China's Short Video Development

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Abstract: In 2016, the short video industry developed rapidly and gradually became an important way of information dissemination. This paper summarizes the current status of domestic short video development from the perspectives of background locating, content, and technology by analyzing multiple short video big data reports. In general, the short video market has initially formed, but it has not been finalized. The short video industry is still developing rapidly. Both traditional media with content advantages and new media with technical advantages may become the dominant factors in the short video industry.

1. Introduction

The popularity of smartphones and the rapid development of mobile internet have led to the rapid growth of short video users. The China Short Video Market Research Report for the First Half of 2017 released by iMedia Consulting in 2017 shows that by the end of 2016, China Mobile's short video users have reached 153 million, and by the end of 2017 this data reaches 242 million.^[1]

However, short videos do not have a strict definition. Generally speaking, short videos are shorter than 20 minutes, and most of them are shorter than 5 minutes. However, the method of defining short videos by duration alone is lacking in science. The length of PGC (Professional Generated Content) short videos is kept within 2 to 6 minutes, while the length of UGC (User-Generate Content) short videos is mostly insufficient. For one minute, it can be seen that short video is only a concept generated relative to the existing content forms on the market, and its definition will also be a long-term exploration process.

2. Boosting of Short Video Industry

After nearly two years of rapid development, both the short video app and MCN have gone through several rounds of teamwork and integration. Now the short video industry is showing a tripartite situation. Today's Toutiao has three short video software, vibrato short video, volcano small video and watermelon video. Let's take a look at two popular short video software, including the second shot and the small coffee show. Heyi Group has two platforms, Tudou and Youku. However, the situation is not completely fixed, and the rapid development trend of short videos will naturally attract the attention of Internet giants. The three companies of BAT have recently entered short video initiatives. Heyi Group is a wholly-owned subsidiary of Alibaba. Baidu has launched strategic cooperation with apps such as Renren Video. Tencent has invested a large amount of money in the fastest influential players. The participation of these giants makes the situation of the short video market complicated, so the development of the short video industry is still in a turbulent period.

3. Rising of Vertical Short Video Apps

There are three main ways for users to watch short videos. According to the China Short Video Market Research Report for the First Half of 2017 released by iMedia Consulting, 60.5% of users watch in embedded short video applications such as Weibo and Today's Headline. ; While 29.1% of

users choose to watch in vertical short video applications such as fast hand, second shot, etc .; only 12.6% of users watch on traditional video platforms such as Youku.^[2]

In March 2017, Aurora Big Data released the Vertical Short Video App Industry Report. In January 2017, the number of users of the vertical short video app reached 131 million, with a penetration rate of 19.3%. The Q3 Mobile Internet Report 2017 released by Aurora Big Data in October shows that in the third quarter of 2017, the penetration rates of volcanic small videos and tremolo short videos were 205.5% and 151.5%, respectively. Third and fourth place among all mobile apps. Besides, the volcanic small video DAU (number of daily active users) increased by 233.2% month-on-month, which is the largest increase among all mobile phone applications. The Tik Tok short video also ranked third in this list with a 134.8% increase.^[3] These data indicate that the development of vertical short videos is growing rapidly, and according to the China Short Video Market Research Report for the First Half of 2017 released by Le Méridien, the users of vertical short video apps have a high usage time and frequency. s level. Embedded short videos are often limited by the platform. For example, short videos that are highly entertaining are not suitable for dissemination on mainstream information APPs. This limitation has enabled the rapid development of vertical short video apps such as volcanic small videos and tremolo short videos.

4. Innovation of Production Methods and Usage

From the perspective of PGC, the production methods of professional producers are constantly innovating. The use of the latest technology to produce short videos has become an industry standard. For example, the CCTV Network New Perspectives of the Two Sessions column uses a series of new technologies such as drones, VR, and H5 to produce Why This Village Makes the General Secretary Remember? There is also a crowdsourcing-like form that invites Chinese people worldwide to sing and upload Yellow River Chorus, a small video work that was finally edited and displayed in 3D. These two works have not only won awards but also attracted widespread attention in the industry and have a profound impact.

From the perspective of UGC, with the continuous upgrade of smartphones, short video applications are constantly updated. It is becoming easier and easier for users to use short video software, and the productions are becoming more and more beautiful. Tik Tok short video introduces the concept of mirror movement: users can make a short video work by moving, freezing and rotating the phone lens. With the music, the work will show a sense of rhythm and full of appeal. Correspondingly, there are many mirror experts in the Tik Tok community, and some mirror challenges will be released from time to time for users to participate. Also, the powerful functions of filters, beauty, and editing of vertical short video applications are deeply loved by users. According to AiMedia Consulting's Chinese Short Video Market Research Report for the First Half of 2017, 51.7% of vertical short video apps Users have used the function of shooting and making short videos, and 53.3% of them often use filters and beauty functions, and 50.7% of users often use editing functions.

5. Rights Protection Contesting

On February 8, 2017, the interface short video work One Day of Mysterious Chinese Behind Trump's Selection of Leaders was applied for the nation's first short video copyright registration, announcing that the short video industry has since started the rights era. However, the CEO of the short video app Pear Video, the main information category, said in an interview that text copyright cannot be fully protected, and the short video industry is the same.

Large columns or organizations are aware of rights protection and also know how to protect them. But unlike other media, most short videos are produced and uploaded by users. Original users often show two different mentalities when they are pirated: one is to think that their work has been pirated is an affirmation of the work, and more people see it, so they don't care; the other is Seeing that his work has been misappropriated, but his awareness of intellectual property protection is

weak, and he does not know how to protect his rights, he feels that even if he is held accountable, he will stop. These initiatives have also caused rampant piracy.

Piracy of short videos will directly damage the interests of the original creators, and discourage the creative enthusiasm of the original creators, which may cause the loss of the original creators. How to protect the interests of the creators is an important issue to be solved urgently in various short video platforms. Recently, some platforms have taken the first step in fulfilling their main responsibility. Self-media users who make headlines today can file infringement complaints with the platform, and self-media reported for plagiarism may be permanently banned. On April 13, 2017, the 37th Copyright Owner Salon with the theme of Content Supervision and Copyright Protection of Short Videos was held in Beijing. Experts and scholars attending the meeting provided the applicability of the traditional audiovisual work system to short videos and short video platforms. The author's fault identification and infringement liability were discussed, and short video content supervision ideas of control in advance, innovation during the event, and post-processing were put forward.

6. Development Trend

6.1 Short Video Content Develops into Vertical Fields

In the first half of 2017, vertical short video software continued to grow. Short video software such as fast hand and second shot successfully attracted a large number of users. Therefore, from the perspective of channels, the short video distribution channel has completed the transition from embedded to vertical. The goal. However, in terms of content, funny content and entertainment gossip content are still the largest and most popular subject matter for users.

However, short video content is gradually moving away from the single model of pan-entertainment and is developing in a vertical and refined direction. On the one hand, a group of vertical short video software similar to Tik Tok, which only focuses on a certain field, has begun to appear. For example, the sports vertical short video social platform Second Hi founded by a famous football player; Lin Chufang, the former vice president of headline today, left and joined the content entrepreneurship, intending to create a vertical short video product with Global Travel as its core. On the other hand, creators who are vertical in the fields of beauty, food, mother and baby are also more professional and receive more and more attention. According to the 2016 White Paper on Short Video Content Ecology released at the beginning of this year, In the fourth quarter of 2016, more than 40 vertical categories were covered by short video creators. Previously, non-entertainment stars, non-news scenes, non- The proportion of pure funny content obtained traffic is less than 20%; in 2016, the vertical traffic content accounted for more than 60% of total traffic. Driven by the user market and the commercial market, vertical content grew at a rapid rate in 2016.^[4]

It is worth mentioning that financial, maternal and infant and medical fields that are closely related to people's lives and more specialized will be more favored by capital. And these areas do not occupy the absolute advantage of IP, so they are still in a period of turbulence due to competition and huge market potential.

6.2 The Intelligent Distribution Becomes the Main Push Method

The intelligent distribution model based on user big data and computer algorithms has become very mature in the field of news push and music push. In the short video field, some mobile phone apps have taken the lead in using this model. Today's headlines are the pioneers of the domestic algorithm push. The Tik Tok short videos rely on the parent company's powerful intelligent distribution technology, attracting 20 million users in just one year, and maintain a rapid upward momentum. As of November 2017, Tik Tok short videos ranked 14th in the Apple App Store and the free app overall list, which is the highest-ranking among vertical short video apps. In second place is the undisputed leader in the short video app-Quick Hand. The number of fast-handed users exceeded 500 million as early as 2016, and the daily life of users also approached 10 million in

September 2017. The number of fast-handed users can grow rapidly and maintain a certain user stickiness is also due to the introduction of intelligent algorithms for an accurate push. It is not difficult to see from these two cases that the key technologies of intelligent distribution to accumulate users and establish strong relationships with users are bound to be universally applied. In addition, through intelligent distribution, low-quality short videos can be prevented from entering the user's field of vision too much, which is also a way of control in a sense.

6.3 From Ugc to Pgc, Users and Content Common Progress

At present, most of the works on the short video platform are UGC content. Due to the difference in the professional level of users, the quality of short videos is uneven, and the user experience is significantly different. The short video industry still follows the content is king, users first principle. Therefore, in order to attract more traffic and achieve the continuous prosperity of the short video industry, various types of short video content with excellent quality and good user experience need to emerge. There are certain requirements on the professional level of video photographers. The content production model of PUG (Professional User Generated Content) has emerged as the times require, and it has been increasingly valued by various short video platform operators, and it will become the mainstream in the future development. The vertical and professional nature of PUC content makes it easier to attract and retain target users who are scattered on different platforms and to reconstruct the short video ecosystem. In recent years, some short video agencies have hired a group of highly professional users to become their own photoshoots through hiring. For example, Pear Video attracted 11,000 shoots around the world through the payment of contributions within 24 hours. Pear Video guarantees the output of high-quality content through the requirements of professional shooting qualifications and customization of shooting content. On the one hand, this model of recruiting shooters, identifying qualifications, and paying for the payment of manuscripts, on the one hand, encourages and cultivates the emergence of more professional shooters, on the other hand, it continuously optimizes the quality of short video content to achieve common progress for users and content. And ordinary content consumers also screen short videos by clicking and playing completion. The push rate of short videos with few clicks and low playback completion is bound to be low. This interaction between creators and content consumers indirectly improves the quality of short videos and is also conducive to improving the environment of short video platforms.

7. Conclusion

With the continuous development of communication technology, the 5G era is coming. Faster transmission speed and cheaper cost will promote the further development of short videos. Who can lead the way in vertical and deep content reform? Who can take the lead in solving the problem of copyright protection for creators? Who can stand on the heels of BAT? Who will become the next short video super IP after famous YouTubers? There are too many unknowns and opportunities in the short video field, and the second half of the short video field has just begun.

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