

Development Dynamics of the Film and Television Media Industry in the Post-Pandemic Era (Postprint)

Authors: Yu Yang

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Abstract

At the beginning of the Gengzi year, a major epidemic spread from Jingchu, impacting the development of all sectors. The nation invested tremendous human, material, and financial resources to control the pandemic, aiming to maximize economic recovery. In this extraordinary period, this study employs a statistical perspective to interpret the industry winter of film and television media under the pandemic. Through big data analysis and comparison, it systematically examines the current development dynamics of the film and television media industry. By integrating industry conditions from different periods before and after the pandemic, it elaborates on the subtle transformations within the film and television media sector in the post-pandemic era, thereby interpreting the recovery trajectory and future prospects of the domestic film and television industry.

Full Text

Preamble

Research on Development Trends in the Film and Media Industry in the Post-Pandemic Era

(Minnan University of Science and Technology, Shishi, Fujian 362700)

Abstract: In early 2020, a major epidemic spread throughout China, impacting development across all industries. The nation devoted enormous human, material, and financial resources to control the outbreak and restore the economy to the greatest extent possible. Focusing on this special period, this paper interprets the winter of the film and media industry under the pandemic from a statistical perspective. Through big data analysis and comparison, it systematically examines the current development dynamics of the film and media industry. By comparing industry conditions before and after the pandemic, it elaborates

on subtle changes in the post-pandemic era and interprets the recovery and future prospects of China's domestic film industry.

Keywords: post-pandemic era; film industry data; big data analysis; film economy research; diversified revenue

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1. Pre-Pandemic Trends in the Film and Media Industry

Prior to the pandemic, China's film industry appeared to be thriving, yet behind this prosperity lay constant capital flows and underlying instability, with real data providing direct feedback on the industry's true condition. Looking back several years, regulatory tightening in the cultural and entertainment sector from 2016 to 2018 placed significant pressure on content providers. Policies such as the "restriction on historical dramas," "salary cap for actors," "limitation on foreign content," and campaigns against vulgar content and "yin-yang contracts" led to a weakening of industry revenues. The growth rate of online content plummeted dramatically; according to publicly available domestic data, the online video industry's revenue scale and growth rate began to decline noticeably from 2015 onward, with growth rates remaining at approximately 20% between 2017 and 2019. Similarly, official Chinese data on total box office revenue and growth rates showed a precipitous drop in year-over-year growth starting in 2015, with 2016 experiencing near-zero growth [Figure 1: see original paper]. Furthermore, statistics on the number of episodes and series of domestically produced television dramas from 2012 to 2019 revealed a downward trend beginning in 2015, characterized not merely by slowing growth but by an absolute decline in content volume—a reduction of nearly 50% over six years. This substantial decline resulted not only from regulatory policies but also from aggressive competition from new media content and shifting audience preferences [1-2].

Capital, however, does not remain in unprofitable darkness; it inevitably seeks new avenues. Following several rounds of regulatory adjustments, variety shows emerged relatively unscathed, prompting a wave of capital to flow toward this sector. From 2015 to 2019, as traditional television media weakened, online variety shows maintained an annual growth rate of nearly 30%, with the market size expanding from 1 billion RMB in 2015 to 8.81 billion RMB in 2019 [3]. Compared to films and television dramas, variety shows offered greater possibilities, including synergistic benefits and sustained audience engagement. Over the past five years, the rise of variety shows has unleashed unprecedented

demand within the national economy. Korean variety programs, once dominant among younger audiences, have been relegated to secondary status by China' s burgeoning variety show market [4]. With continued positive policy guidance and gradual industry maturation, supply chain layers have become increasingly professional, and the industrial operation system has grown healthier.

Thus, it is evident that the film industry has not been in overall decline in recent years but rather has gradually diversified. Despite short-term growth slowdowns, both films and television dramas have placed greater emphasis on production quality, with an increasing number of high-quality productions achieving both critical acclaim and box office success. The era of "bad films ruling the box office" and "brushing existence" has been eliminated from today' s industry [5]. The transformation reflects not merely regulatory pressure but also fundamental changes in content consumption habits following the rise of mobile internet.

2. The Pandemic' s Emergency Brake on China' s Film Industry

Looking back to early 2020, the global COVID-19 pandemic forced *Detective Chinatown 3* to withdraw from its scheduled release, while *Lost in Russia* pivoted to online distribution, purchased by ByteDance' s Jinri Toutiao for 600 million RMB and offered to the nation as a free film. Under the pandemic, most entertainment venues, including cinemas, responded to national policy calls and closed their doors. According to data collected by one platform, China' s cinema reopening rate in mid-to-late March 2020 was only 4.8%, generating total box office revenue of just 118,200 RMB with a cumulative audience of 3,810 people—a clearly pessimistic picture. Daily data following reopening remained bleak; on March 22, for instance, only 529 cinemas were operational (a 4.8% reopening rate), screening 1,389 total showings for 1,326 viewers—averaging less than one person per screening and truly enabling individual "private" screenings. The day' s total box office revenue amounted to merely 41,400 RMB [6-7].

Reopened cinemas primarily screened older films, and to boost performance, production and distribution companies began offering concessions to theaters. For example, China Film Group' s distribution arm negotiated with multiple productions to reduce revenue-sharing ratios from the standard 43% to 0%, meaning numerous films were exhibited on a pro bono basis to stimulate the market. Nevertheless, most cinemas nationwide remained closed, and as domestic cases intensified, all cinemas were subsequently ordered to shut down unconditionally, plunging theatrical films into a deep hibernation. Variety shows fared no better; unless content had been prerecorded, pandemic-related gathering restrictions forced some singing competitions to adopt online video connections for recording and broadcasting, significantly compromising program quality and, consequently, ratings. Advertising and ancillary operations ground to a halt. Film and television crews that had not completed shooting before the New Year faced immense hardship, unable to reconvene scattered staff members and forced to wait for the pandemic to fully subside [8]. Overall, the entire film industry re-

mained in a semi-dormant state during the first half of 2020, with production suspended, cinemas closed, and variety shows halted.

3. Pandemic Impact on Global Film and Media Ecosystem

Before vaccine availability, Hollywood similarly suffered massive pandemic shocks. Combined with the previous administration's counterproductive pandemic measures, the United States faced an exceptionally severe outbreak in 2020. As the world's largest film production hub, Hollywood was inevitably affected, with losses continuously amplified as control measures failed.

First, the pandemic disrupted film production and release schedules. In the first half of 2020, Warner Bros., the largest American and global film production company, adjusted multiple film schedules due to the outbreak. According to foreign media reports, *The Batman*, starring Robert Pattinson and originally scheduled for release, was postponed to October 1, 2021. *The Many Saints of Newark*, initially set for September 2020, was delayed to March 12, 2021, and subsequently pushed again to September 24, 2021, contingent upon subsequent pandemic control effectiveness. Other major IP films such as *No Time to Die*, *Fast & Furious 9*, and *Black Widow* also adjusted their schedules. Disney's *Mulan* experienced relatively minor impact because China had achieved initial pandemic control success by mid-2020, allowing its 顺利 release in mainland China on September 11, 2020, while the United States remained in online distribution mode [9][10]. Directed by Niki Caro, this excellent production team brought China's legendary story to the big screen, demonstrating American companies' confidence in China's film and media market.

Second, the pandemic devastated industry revenues. Hollywood's major IP films require global box office support to sustain continuous production, but the outbreak caught everyone off guard. When previous films could not be released and capital could not be recouped, subsequent production cycles were affected, forcing even scheduled projects into indefinite postponement. Beyond production and distribution companies, familiar entities such as screenwriters' guilds and actors' unions all depend on stable markets for revenue, yet many film and media professionals faced temporary unemployment during the pandemic [11]. Although the United States relaxed theater restrictions and provided policy subsidies in the first half of 2020 to stimulate economic development, these measures proved insufficient for such a massive market. Premature relaxation even worsened the outbreak, creating a vicious cycle.

Finally, the pandemic fundamentally impacted the global film and media industry's ecosystem. Films, television dramas, and variety shows cannot be created by individuals alone; they require division of labor and collaborative effort. While screenwriters could work from home via online meetings, directors, actors, cinematographers, and other frontline creators required face-to-face interaction. On March 11, 2020, a female staff member on FOX's new series *NEXT* tested positive for COVID-19. On March 12, Tom Hanks confirmed his

infection while filming *Elvis*, with similar news emerging almost daily. A single infection could halt entire teams and projects. During the pandemic, major studios including Disney, Universal, Paramount, and Columbia all reported severe industry damage, with film withdrawals and schedule changes becoming routine. Countless cinemas were forced to close, commercial venues could only display “disinfected” signs to reduce public panic, and the unrelenting outbreak forced Universal Studios and Disneyland to shut down, with Broadway performances and theaters closed indefinitely [12]. If major corporations suffered such fates, smaller industry companies had long become cannon fodder in the pandemic’s onslaught. American film festivals, music festivals, and award ceremonies were postponed or canceled, while popular variety shows like *America’s Got Talent* and *Survivor* suspended broadcasting—no amount of capital could override public health concerns.

4. Economic Recovery of the Film Industry in the Post-Pandemic Era

What defines the post-pandemic era? It refers to the period after nationwide pandemic control has achieved effective, phased victory. As congregate venues such as cinemas gradually resumed operations alongside broader economic and educational reopening, outstanding theatrical works emerged, exemplified by the trailblazing film *The Eight Hundred*. Since its release on August 21, 2020, the film has achieved both critical acclaim and box office success, rapidly revitalizing China’s film market emerging from the pandemic shadow. According to Maoyan Professional box office data, by October 18, 2020, *The Eight Hundred* had accumulated over 3 billion RMB in total box office revenue, surpassing the 2018 summer hit *Dying to Survive*. Subsequently, *My People, My Homeland* employed a collective creation approach, providing another boost to China’s film industry. Featuring top domestic directors and screenwriters, the film’s box office appeal reached 2.727 billion RMB. It is crucial to remember that during this period when the global pandemic had not fully subsided, even cinemas in low-risk areas were prohibited from selling adjacent seats—ticketing systems automatically left empty seats between patrons, allowing only half-capacity screenings. That such box office figures were achieved under these circumstances indicates a significant increase in screening frequency. According to Lighthouse data at 10:00 AM on November 7, 2020, China’s national box office for 2020 exceeded 15 billion RMB, with total admissions reaching 403 million across 38.09 million screenings. These data clearly demonstrate that rather than retreating, China’s film industry has gradually restored its strength under robust national policy guidance, with production crews resuming work and actors returning to their positions, bringing everything back to normal tracks.

From the Year of the Rat to the Year of the Ox, the global pandemic has not ended, and imported cases remain numerous. This caused another surge in local infections in early 2021, triggering successive waves of prevention measures and renewed closures of entertainment venues in medium- and high-risk areas.

However, the overall national pandemic prevention situation remains positive, bolstered by excellent Spring Festival films. *Detective Chinatown 3*, postponed from the previous year, achieved 1.048 billion RMB on its opening day, while *Hi, Mom* soared to over 5 billion RMB after medium- and high-risk areas were effectively controlled—these figures represent the best testament to the recovery of China’ s domestic film and media industry in the post-pandemic era [13].

Following the Spring Festival, several scheduled films appear to have heeded the call of high box office numbers. For instance, the Tomb Sweeping Day hit *Sister*, with its warm and touching social themes, steadily entered the billion-RMB club, leading the holiday box office with its unique family and female-centric perspective. Based on current scheduling trends, the domestic situation remains relatively stable, with an overall positive trajectory.

As evident from the preceding data analysis, the entire film and media industry has not only resumed production but has also extended into diversified revenue models, such as online live streaming and upgraded multi-channel marketing. According to video platform statistics, membership numbers across major platforms increased during the pandemic, with online viewership rising substantially [1].

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

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