

The Development of Short Plays in China

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Abstract

Short plays have rapidly risen in popularity due to their novel format and flexible business models, yet they face challenges such as content homogeneity, vulgar material, and profitability issues. This paper analyzes the current development, challenges, and solutions for short plays in China. It proposes measures including content innovation, copyright protection, technology enhancement, policy support, and business model innovation to promote sustainable development in the short play industry. In the future, with the widespread adoption of mobile internet and technological advancements, short plays are expected to expand their market share, improve production quality, and enhance viewing experiences, becoming a vital component of the entertainment industry.

Keywords

Short plays, mobile internet, business models, policy support, solutions, entertainment industry.

1. Introduction

1.1. Definition of Short Plays:

Short plays are a form of drama where each episode typically ranges from a few seconds to about 15 minutes in length, characterized by their concise and compact storytelling (Office of the State Administration of Radio, Film, and Television, 2022). The emergence of short plays is closely linked to the rapid development of short video platforms. This format captivates a vast audience with fragmented viewing times by presenting a complete and compact story within a limited timeframe. By December 2020, the number of mobile internet users in China had reached 986 million (Cyberspace Administration of China, 2021). With the widespread adoption of mobile internet and smartphones, short plays have quickly become a popular form of entertainment among new generations, particularly young audiences in China.

The rise of short plays in China has been significantly aided by the explosive growth of short video platforms such as Douyin and Kuaishou. These platforms provide a natural dissemination channel and a broad audience base for short plays, not only lowering the barrier for content creators but also helping high-quality content reach users precisely through powerful data algorithms. The importance of short plays is reflected in their innovative impact on the film and television industry—they break traditional duration constraints of TV dramas and films, offering content creators more possibilities for creation and monetization, thereby becoming an integral part of the entertainment industry.

During the writing of this paper, we referred to multiple studies on the current state, market size, and business models of the short play industry. Guo and Tong's (2024) research discusses the rise of short plays in the mobile internet era and their impact on traditional media, noting that their concise narrative style attracts a large number of young viewers. Zhu and Wen (2021) analyzed the rapid development of short plays domestically, particularly the role of short video

platforms in promoting the dissemination of short plays, providing important references for understanding the competitive landscape of the short play market. Additionally, You (2022) explored the challenges of production and content innovation in short plays, emphasizing the importance of combining technology with creativity. Wang (2024) investigated the challenges and opportunities for monetizing short plays under a subscription model, offering significant insights into the profit-making models of short plays. These studies provide a solid theoretical foundation and data support for this paper.

The purpose of this study is to explore the position of short plays within China's cultural industry and their future development potential. By analyzing the market size, business models, audience demographics, and challenges faced by short plays, we aim to reveal the unique advantages and potential issues of this emerging entertainment form, providing valuable insights for industry practitioners and researchers. Specifically, this paper will focus on the innovative business models, content innovation strategies, and policy recommendations for the development of the short play industry.

The main findings of this study include: firstly, identifying the unique role of short plays in attracting young audiences and driving transformation in the film and television industry; secondly, analyzing the primary profit-making models of short plays and their associated high-risk challenges, revealing the uncertainties in industry development; and finally, proposing a series of practical strategies and recommendations to promote innovation and sustainable development in the short play industry. These results not only enrich the theoretical research on short plays but also provide guidance and reference for industry practice.

2. Literature Review

2.1. Current Market Overview of Short Plays:

Short plays have rapidly expanded in market size within China, becoming a significant part of the short video market. In recent years, as the demand for bite-sized content has grown, the popularity of short plays has notably increased, with the market size expanding annually. According to the "2023-2024 China Short Play Market Research Report," the market size of online short plays in China reached 37.39 billion yuan in 2023, a year-on-year increase of 267.65%, and is expected to exceed 100 billion yuan by 2027 (iiMedia Research, 2023). Compared to the total box office of 54.915 billion yuan in China in 2023 (Luo & Lü, 2024), the market size of short plays has approached 70% of the film market.

In terms of platforms, Douyin and Kuaishou are the main channels for the distribution of short plays, occupying the majority of the market share. Douyin maintains a leading position in the short play market through its powerful algorithmic recommendations and extensive user base. Kuaishou leverages its first-mover advantage in the short play track, launching initiatives like the Photosynthesis Plan, Kuaishou Mini Theater, and Starlight Project, accumulating a significant number of influential KOLs, with more than 30 authors having over 10 million followers and over 60,000 creators participating in short play creation (Lin, 2021). Additionally, traditional video platforms such as Tencent Video and iQIYI have also entered the short play market by launching their own productions to expand their influence.

2.2. Business Models of Short Plays:

The business models of short plays are diverse and flexible, primarily including advertising revenue and pay-per-view options. Advertising is one of the crucial sources of revenue for short plays, where brands increase revenue by embedding ads into the storyline or sponsoring episodes. Moreover, many short plays are presented in segments on short video platforms, using engaging plots to attract viewers to click links that redirect them to mini-program

platforms to watch complete episodes. This model capitalizes on viewer curiosity at climactic story points, prompting them to pay to view subsequent content (Huang & Guo, 2023).

In terms of investment and production costs, short plays have a distinct low-cost advantage compared to traditional films and dramas. Due to their concise and compact nature, the production cycles are short, and the financial investment required is relatively low. With a broad audience base and flexible business models, short plays have the potential for high returns. Producers can achieve a high return on investment in a short period through precise market positioning and high-quality content creation, attracting significant attention from investors and content creators. However, there are also considerable risks; if the conversion rate of short play streaming is low, it could mean no breakout hits, leading to an inability to recover costs.

2.3. Audience Analysis:

The primary audience for short plays is concentrated among individuals aged 15 to 29, accounting for approximately 62.6%, and from tier-three and tier-four cities and below (Sun, 2024). These viewers typically have more fragmented time and higher entertainment demands. Audiences in lower-tier cities, due to a slower pace of life, usually have more leisure time to watch short videos and short plays. Furthermore, as 70% of online short drama users belong to the middle and low-income groups (Huang, 2024), they are price-sensitive and tend to opt for free or low-cost content consumption methods.

2.4. Analysis of the Current Status and Future Development of the Short Play Market by Domestic Scholars.

2.4.1. Discussion on the Position and Impact of Short Plays within the Chinese Cultural Industry.

In recent years, domestic scholars have extensively studied the current market status and future development of short plays. Guo and Tong (2024) analyzed in detail the rise and development of short plays in the Chinese market, noting that their concise narrative style and flexible dissemination modes quickly attracted a large young audience. Guo also explored the position and impact of short plays within China's cultural industry, suggesting that they not only fill a gap in the fragmented entertainment market left by traditional dramas but also promote diversification and innovation in film and television content. In addition, the study of Zhu and Wen (2021) emphasized the rapid development of micro short plays in China, especially the promotion of short video platforms to the spread of micro short plays. Zhu and Wen pointed out that short video platforms such as Douyin and Kuaishou have greatly promoted the spread of micro short plays and the growth of audiences through their powerful algorithm recommendation and wide user base. This study provides an important reference for us to understand the competitive pattern of the mini-drama market.

2.4.2. Theoretical Research and Empirical Analysis of the Business Models of Short Plays.

In terms of business model, Wang (2024) discussed the challenges and opportunities of monetizing micro-short plays under the paid subscription model. She pointed out that the paid subscription model has established a direct economic connection between micro creators and users, changing the traditional advertising revenue model. However, this model puts forward higher requirements for content quality and users' awareness of copyright, but also faces challenges from market competition and piracy.

2.5. International Perspective

2.5.1. Performance and Research of Short Plays in the International Market:

Internationally, short plays have shown strong development momentum as well. The American platform Quibi is a prime example of the internationalization of short plays. Quibi focused on high-quality, short-duration film and television content, aimed at providing young users with professionally produced short dramas and films (Xu, 2020). Quibi's success indicates that short-duration, high-quality content also has a broad audience base in the international market.

2.5.2. International Scholars' Analysis of the Chinese Short Play Model and Its Adaptability Overseas:

The development of short plays in South Korea has also provided useful references for the international market. Korean short plays typically feature youth idol and pseudo-rotten themes, meeting market demand and achieving good reputation through a simultaneous funding and filming system (Xu, 2020). This model emphasizes the combination of user demands and high-quality content, offering valuable experiences for the development of short plays in China.

However, the performance of Chinese short plays in the overseas market is more complex. On November 11, 2023, the Chinese short play app ReelShort briefly surpassed TikTok to become the most popular entertainment app in the Apple U.S. App Store, garnering nearly 2 million downloads within a month (Yuan, 2024). However, this success was short-lived, as ReelShort quickly slipped down the rankings. This indicates that while short plays initially perform well in overseas markets, their sustainability and long-term impact still require observation and validation.

International scholars have also provided important insights into the analysis of the Chinese short play model. Wang (2024) noted that although Chinese short plays have achieved significant success domestically, their adaptability in overseas markets needs further verification. She suggests that for Chinese short plays to achieve greater success internationally, they should focus on content localization and cultural adaptation.

3. Current Status and Issues in the Short Play Industry

3.1. Homogeneity and Plagiarism:

3.1.1. Content Homogeneity

As the short play market rapidly expands, the problem of content homogeneity becomes increasingly apparent. This phenomenon not only impacts the viewing experience but also restricts the sustainable development of the industry. A lack of innovation in scripts, rampant plagiarism, and a scarcity of originality within the industry are key factors contributing to content homogeneity.

3.1.2. Lack of Originality in Creation

The rapid development of short plays has led to a surge of productions, many of which lack novelty in themes, plots, and character settings. Common themes like "rebirth for revenge," "domineering CEO falls in love with me," and "Republic-era young marshal" have been overexploited, significantly reducing audience interest and novelty (Xu & Bai, 2024). This thematic redundancy results in a high degree of homogeneity in the short play market, making it difficult for viewers to find truly innovative content among the plethora of similar works.

3.1.3. Lack of Script Innovation and the Impact of Plagiarism

A shortage of script innovation poses another significant issue for the short play industry. Many short play scripts are adaptations from web novel IPs, relying too heavily on formulaic plot structures and character setups, lacking originality and uniqueness. Additionally, plagiarism is a common issue in the industry. Some producers, in pursuit of quick profits, resort to imitating

or directly copying successful works to produce low-cost, low-quality series. Such practices not only harm the rights of original creators but also negatively impact the healthy development of the entire industry.

3.1.4. Lack of Original Spirit and Creative Bottlenecks in the Industry Leading to Intense but Monotonous Competition

There is a widespread lack of original spirit and creativity within the short play industry, leading to a market flooded with similar works. Producers tend to opt for tried and tested themes and models, lacking exploration and experimentation with new topics and forms. This convergent approach to creation not only limits the diversity of short plays but also intensifies market competition. Since homogeneous works struggle to establish a competitive advantage, producers are forced to engage in price and marketing wars to capture market share, further compressing profit margins and reducing the industry's overall drive for innovation.

3.2. Vulgarity in Content

The rapid expansion of the short play market has been accompanied by an inundation of vulgar, violent, and pornographic content, which often employs exaggerated expressions to captivate audiences. However, the adverse effects of such content have increasingly garnered broad societal concern. In response, the National Radio and Television Administration (NRTA) has undertaken extensive measures to remove and rectify series containing such content. Starting in late November 2022, the NRTA initiated a special rectification effort targeting "mini-program" short plays, resulting in the removal of over 25,300 short plays containing vulgar, violent, lowbrow, and kitsch content, totaling 1,365,004 episodes, and 2,420 "mini-programs" with non-compliant content by February 28, 2023. While these measures have protected audiences, especially minors, they have also limited creators' freedom of expression. In this context, in November 2023, the NRTA intensified its efforts against non-compliant short plays, completely removing from all networks those that primarily depict extreme revenge and violent plots, such as the short play "Black Lotus Ascension Manual," which has been criticized for its confused moral perspective and excessive depiction of human vices, contributing to a negative value orientation. The increased regulatory efforts, while curtailing the spread of lowbrow content, have also encouraged creators to explore more creative and culturally deep expressions within the confines of legal and regulatory compliance, to attract audiences while avoiding policy risks.

Simultaneously, the Zhejiang Radio and Television Administration has actively promoted the development of the short play industry in 2023, hosting the Hangzhou Short Play Conference to solidify the industry's foundational ecosystem (The National Radio and Television Administration, Zhejiang Branch, 2023). Through collaborations with the NRTA Network Division, the Writers Association Online Literature Center, and other institutions, it launched the "Young Online Screenwriters Incentive and Support Plan" and released a series of policies. By actively connecting with leading corporate resources such as Wasu, Youku, and Kuaishou, the "Lin Drama" short play alliance was established, issuing industry initiatives aimed at steering short plays away from homogeneity, vulgarity, and excessive commercialization.

3.3. High Risk and Limited Profitability

Despite the rapid development of the short play industry, it is plagued by high risks and limited profitability, primarily reflected in investment models, production costs, and market uncertainties.

3.3.1. High-Risk Nature of Short Play Investments

The business model of short plays is highly dependent on traffic, making their revenue streams more unstable compared to traditional film and television productions (Wang, 2024). The profitability of these projects hinges on the number of views and the level of user engagement

on short video platforms, which directly impacts advertising revenues and pay-per-view earnings (Wang, 2024). Given the highly unpredictable nature of traffic, the investment risks associated with short plays are substantial. Additionally, the continual changes in platform algorithm recommendations make it difficult for investors to predict exposure, complicating the estimation of potential returns.

Moreover, as audience preferences and consumption habits evolve rapidly, a previously popular theme can quickly lose its appeal, leading to potential investment losses. For small and medium-sized production companies, this high level of risk imposes significant financial pressures when entering the short play market.

3.3.2. Increasing Production and Promotion Costs Compress Profit Margins

As competition in the short play market intensifies, production and promotional costs are steadily climbing. Even though short plays generally incur lower costs compared to traditional films and television series, producers often need to invest significantly in areas like special effects, costumes, and sets to enhance the overall quality of their productions. Additionally, expenses related to platform placement and marketing promotions are continually increasing (Wang, 2024), ensuring that productions stand out amongst numerous competitors. These increasing costs directly squeeze the profit margins of short plays.

In this context, production companies and investors need to strike a balance between ensuring high-quality content and managing costs. However, due to the uncertain market environment and fierce competition, many companies face the challenge of maintaining financial balance (Zhu & Wen, 2021).

4. Solutions

4.1. Innovation as the Core Driver of Development:

4.1.1. Content Innovation

Innovation is the core driving force for the development of the short play industry. To encourage screenwriters and directors to create original scripts, the industry needs to explore diverse themes such as science fiction, mystery, and history to meet the varying needs of audiences (Wang, 2024). Creators should focus on exploring themes rich in cultural and social value, enhancing the artistic quality and appeal of short plays through innovative storytelling and expressive techniques.

Establishing a strict content review mechanism is crucial to ensure the quality and diversity of original content. Industry associations could set up content review committees to professionally evaluate short plays, ensuring their legality and innovation. Additionally, fostering an internal innovation and creativity award system within the industry can recognize outstanding original works and creators, stimulating creativity and motivation among professionals (Zhu & Wen, 2021).

Through these measures, the short play industry can create a healthy content production environment, fostering continuous creativity and enhancing the overall quality and market competitiveness of the productions.

4.1.2. Copyright Protection

While promoting content innovation, copyright protection is vital to ensuring creators' rights and the sustainable development of the industry. As the short play market rapidly expands, issues of plagiarism and infringement have become increasingly prevalent, not only harming the interests of original creators but also hindering industry innovation. To address this, multiple measures should be taken regarding copyright protection.

Firstly, improving copyright laws and regulations and establishing a comprehensive copyright protection system is essential to provide legal safeguards for creators. Governments should

strengthen the enforcement of copyright laws, set up dedicated copyright protection agencies, and provide convenient mechanisms for reporting and handling infringements, ensuring timely and effective protection for original works.

Secondly, industry associations and platforms could enhance copyright education and awareness among professionals and users. By organizing copyright protection training, seminars, and lectures, they can elevate the copyright awareness and legal understanding of industry personnel, emphasizing the importance and significance of protecting copyright.

Finally, technological tools should be utilized to enhance the efficiency and effectiveness of copyright protection. Technologies like video fingerprinting can be applied to short video copyright protection. While hash values and video fingerprints are effective auxiliary technologies for copyright protection, they currently suit simple, direct cases of copying and plagiarism. Short plays, being small and flexible in volume, often involve more covert forms of plagiarism, such as copying main plot points and core expressions, which might not be fully addressable by current technologies.

4.2. Technology and Production Enhancement

Utilizing new technologies to enhance the production quality and viewing experience of short plays is key to advancing industry development. Technologies such as AI and VR can bring more creativity and possibilities to short play production, enhancing visual effects and the immersive experience for viewers. For instance, AI can be used for intelligent editing and special effects production, reducing costs and improving efficiency; VR technology can provide an immersive viewing experience, increasing the attractiveness of the productions.

Reducing production costs through technological means is also a crucial strategy. Production companies can adopt new filming and post-production technologies to improve efficiency and content quality, reducing unnecessary expenditures (You, 2022). Additionally, integrating advanced filming equipment and software tools can enhance the technical level and visual effects of the productions, ensuring short plays maintain a competitive edge in the market.

4.3. Policy Recommendations

Strengthening content regulation, particularly strict control over violent and pornographic content, while also considering the limitations imposed on creators' freedom. To promote the healthy development of the short play industry, the government needs to establish a policy framework that supports the innovation of short plays, aligning with regulatory requirements (Guo & Tong, 2024). First, the definitions and standards for short plays should be clarified, formulating appropriate policy standards to guide creators. Secondly, encouraging collaboration between the government and industry associations to establish development funds and provide tax incentives can alleviate financial pressures on production companies, fostering healthy competition within the industry (Zhu & Wen, 2021). The government could also support the creation of short plays by organizing competitions and supporting original projects, discovering and nurturing emerging creators, and enhancing the overall creative level of short plays (You, 2022).

Furthermore, the government should intensify the regulation and guidance of short plays, setting up specialized review agencies to ensure content aligns with mainstream social values. By combining policy support with market regulation, the government can promote the standardized, professional development of the short play industry, safeguarding creators' legitimate rights and encouraging the industry's healthy and sustained growth.

Regulatory Strengthening: With the rapid development of the short play industry, regulatory bodies have intensified scrutiny of content, particularly concerning the control of vulgar, violent, and pornographic material. This trend has significantly impacted the development of

short plays, not only enhancing the quality of industry content but also imposing higher demands on creators' freedom of expression.

4.4. Business Model Innovation

The short play industry needs to explore diversified profit models to achieve sustainable development. Beyond traditional advertising, the industry could increase revenue streams through membership models, content derivatives, and IP development. A membership model can offer high-quality, ad-free viewing experiences, attracting more subscribers (Wang, 2024). Content derivatives and IP development can expand the influence and commercial value of productions by developing related merchandise and extended content.

Additionally, developing interactive content and games related to short plays can increase user engagement and interactivity, an important means to enhance user retention. Through diversified business models, the short play industry can effectively increase revenue, ensuring the sustainability of content creation and production.

5. Conclusion

This paper has summarized the current development, challenges, and solutions for short plays in China. In the section on current status, we discussed the definition of short plays, market size, and main distribution platforms, emphasizing their rapid rise on short video platforms and their innovative impact on the film and television industry. Despite their brief and engaging format and flexible business model rapidly attracting a large young audience, making them an important part of the entertainment industry, the development of short plays still faces numerous challenges. Currently, the short play industry is experiencing a downturn primarily due to issues such as content homogenization, vulgarity, and the high risk associated with limited profitability. Content homogeneity leads to a decrease in audience novelty, while the proliferation of vulgar content has triggered widespread societal concern and strict regulatory control. The problems of high risk and limited profitability mainly reflect in the uncertainty of investment models and the rising costs of production and promotion, which collectively hinder the healthy development of the short play industry. In response to these challenges, this paper proposes multiple solutions, including content innovation and copyright protection, technological and production enhancements, policy recommendations, and business model innovation. By encouraging original content, improving production technology, establishing supportive policies, and exploring diversified profit models, the short play industry is poised for sustainable development in the future.

Looking ahead, although the short play industry is currently in a slump, its prospects remain hopeful. As mobile internet and smartphones continue to proliferate, the demand for bite-sized content will keep growing, potentially allowing short plays to further expand their market share. Future research directions could include exploring the adaptability of short plays in different cultural contexts and their promotion strategies in international markets. Moreover, as technology advances, how to use new technologies such as artificial intelligence and virtual reality to enhance the production level and viewing experience of short plays is also a worthwhile topic for exploration. Through these studies, more theoretical support and practical guidance can be provided for the development of the short play industry.

We believe that short plays hold a significant position in China's cultural industry as an emerging form of entertainment. They not only fill a gap left by traditional dramas in the fragmented entertainment market but also drive the diversification and innovation of film and television content. Although the short play industry currently faces many challenges, by implementing the solutions proposed in this paper, including content innovation, technological

enhancement, and improved policy support, short plays are expected to achieve higher-quality development in the future.

In summary, the rapid development of short plays in China demonstrates their vast potential and broad market prospects. By continually exploring and improving, short plays can further solidify their position in the cultural industry, becoming an integral part of film and television entertainment, and providing audiences with more high-quality content and experiences. As long as the industry actively addresses current challenges and adopts effective measures for improvement, the future of short plays will be increasingly bright.

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