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A Study on the Film Production Industry in Chinese Mainland in 2024

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Abstract: *In 2024, the global Film industry underwent profound transformation amid the restructuring of the media ecosystem and the diversification of entertainment. Chinese mainland's Film market, while maintaining its position as the world's second largest with a box office of 42.502 billion yuan, showed a decline compared with 2023, revealing structural weakness. This shift stemmed not only from external pressures such as global market contraction, short-video diversion, and the rise of AIGC technologies, but also from internal issues like audience aging and the loss of younger viewers. Within a complex environment, this study adopts a framework of "industrial ecology–creative transformation–technological innovation" to explore the transitional path of China's Film industry. On the creative side, Films increasingly focus on social realism and youthful expression; on the production side, technologies such as virtual production, algorithmic creation, and intelligent marketing are reshaping workflows and promoting industrial upgrading. Consequently, the Chinese Film industry is shifting from scale expansion to quality improvement, pursuing sustainable development through technological integration and global narrative innovation, thereby offering valuable insights for the reconstruction of the global Film ecosystem.*

Keywords: *Chinese Mainland Film Industry; Schedule Differentiation; Thematic Expression; Technology-Driven Innovation; Sustainable Development*

1. Introduction

In 2024, as the global economy and cultural consumption entered a period of deep adjustment, the Film industry experienced a dual transformation in both media ecology and industrial models. That year, the Chinese mainland Film market recorded a total box office of 42.502 billion yuan and 1.01 billion admissions [1], marking a 23% decrease from 2023. Although this appears to be a regression, it was not an isolated phenomenon within the Chinese market. Globally, the total Film box office reached approximately 30 billion USD in 2024, down 11.5% from the previous year [2], indicating an overall contraction of the global Film market. On one hand, the rise of online and short-video platforms significantly diverted audiences away from physical theaters; on the other, the diversification of entertainment in the AI era and breakthroughs in virtual reality technologies reshaped audience behavior. More importantly, the emergence of text-to-video models such as Sora revolutionized Film production methods and brought unprecedented challenges to both Film theory and industrial ecology.

In 2024, there were 13,210 cinemas in Chinese mainland generating box office revenue, a net increase of 487 from the previous year, representing a growth rate of 3.9%. The total number of urban theater screens reached 90,968, with a net increase of 4,658 [3]. However, another set of data reveals that total urban theater admissions in 2024 were 1.01 billion, a year-on-year decrease of 22.25%. The average number of Film viewings per urban resident declined from 2.35 in 2023 to 2.17, while the average audience age continued to rise, approaching 30 years old. Female viewers accounted for as much as 58% of the total, whereas the number of adolescent and male audience members continued to decrease [4]. Collectively, these figures highlight a significant shift in the audience structure and viewing habits of the Chinese mainland Film market.

2. Structural Adjustment of the Industrial Ecology:Box Office Differentiation and the Breakthrough of Genre Films

In 2024, the Chinese mainland Film market exhibited distinct schedule-based characteristics. Certain

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major release periods, such as the Spring Festival season, achieved record-breaking box office results, while others, including the summer and National Day holidays, fell short of expectations. This pronounced disparity across release windows reflects the fluctuations of the Mainland market during different periods, revealing underlying structural issues and the uneven nature of audience consumption. Although the global Film market experienced an overall downturn in 2024, and Chinese mainland's total box office decreased by 23% year-on-year—returning to the scale of 2015—it still ranked second globally. Notably, during the first five months of 2024, Chinese mainland's box office performance surpassed that of North America, underscoring its continued significance in the global Film landscape.

In 2024, the Chinese domestic box office was led by a diverse array of films spanning multiple genres, reflecting both audience preferences and the evolving landscape of Chinese cinema[1]. The top-grossing film of the year was YOLO, which earned approximately $479.6 million, followed closely by Successor with $469.6 million and Pegasus 2 with $466.9 million, demonstrating strong performance in contemporary comedy and action genres. Mid-tier successes included Article 20 ($337.6 million), Boonie Bears: Time Twist ($277.1 million), and A Place Called Silence ($186.6 million), illustrating audience engagement with socially resonant narratives, animated features, and drama. The lower end of the top ten comprised The Volunteers: The Battle of Life and Death ($165.1 million), The Last Frenzy ($108.0 million), Her Story ($96.1 million), and Twilight of the Warriors: Walled In ($94.6 million), which, despite comparatively lower earnings, contributed to the overall diversity of the domestic market. Collectively, these figures highlight the robust performance of domestic productions in 2024, the audience's appetite for both mainstream and innovative storytelling, and the ongoing maturation of China's film industry. [5](Note: <Johnny Keep Walking! >was officially released in 2023, but since its release fell in the year-end–New Year period, it is counted in the 2024 box office rankings.)

A statistical analysis of the top ten films at the Chinese mainland box office in 2024 shows that eight were Chinese-language productions, with one each from the United States and Japan, indicating a significant structural shift: the presence of U.S. films continues to decline, while Chinese-language films steadily rise, reflecting evolving audience preferences and the weakening innovation capacity of the U.S. film industry amid stagnant global market growth. Japanese films have also frequently appeared in the top twenty, suggesting the potential for strong box office returns from imported content. Among the eight domestic films, five were released during the Spring Festival, occupying the top five positions, underscoring the period's critical importance. Excluding the Spring Festival releases, box office revenues show a steep decline, highlighting the current imbalance in release schedules and creating a market dominated by a single peak period—Spring Festival films accounted for 18.9% of total annual box office, while non-peak releases contributed only 31.4% [6], indicating growing market dependence on major release windows. During the 2024 Spring Festival, comedy dominated, with films such as <Yolo>, <Article 20>, and <Pegasus 2> effectively capturing audiences' festive emotional demands, securing substantial returns while mitigating investment risks. Overall, four of the top-ten films were comedies, reflecting strong audience demand, driven in part by urban economic pressures that generate anxiety and prompt viewers to seek emotional relief through cinema, making comedy films likely to provide stable investment returns.

The 2024 Spring Festival film market performed exceptionally well, surpassing the same period in 2023 in both box office and key indicators. However, structural contradictions in the post-festival market gradually emerged: during the transition from the May Day to summer release period, a supply gap in new films appeared, and the scarcity of high-profile titles exposed the fragility of release schedule continuity and weaknesses in market adjustment mechanisms. The summer season, targeting primarily young student audiences, continued the trend of youth-oriented content, exemplified by <A Place Called Silence> (directed by Boon-lip Quah), which addressed campus violence and revenge, using crime suspense to resonate with young viewers' emotions and values, and by <Successor> (directed by Yan Fei and Peng Damo, starring Shen Teng and Ma Li), which sustained high box office returns in the comedy genre. Notably, the summer period overlapped with the Paris Olympics, diverting audience attention from theaters and impacting admissions and screening structures, intensifying competition. The National Day release period, historically lucrative, saw diminished box office significance due to thematic repetitiveness and uniformity, despite offering diverse films such as <Bureau 749>, <Tiger Wolf Rabbit>, <The Hutong Cowboy>, and <Xin Da Tou Er Zi He Xiao Tou Ba Ba 6: Mi Ni Da Mao Xian> across mainstream, comedy, and sci-fi genres. While pre-release marketing drove a strong opening day of 494 million yuan, subsequent declines—24.4% the next day and only 154 million yuan by October 7—reflected weak sustained word-of-mouth and a gap between content quality and audience expectations, as nearly all releases received Douban scores below 7.

At the end of the year, the New Year release period has consistently been one of the most important

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windows in the Chinese mainland Film market. Traditionally concentrated in the week before Christmas, it gradually shifted to late November due to the market's popularity, now spanning Christmas, New Year's Day, Spring Festival, Lantern Festival, Valentine's Day, and winter vacation, making it the strongest box office window of the year [7]. While previously weakened by schedule overlaps and genre homogenization, the 2024 New Year period rebounded through in-depth content adjustments. Films such as <Herstory>, <I Am What I Am 2>, <Big World>, and <Octopus with Broken Arms> combined industrial-level production quality, engagement with social issues, and genre innovation to create differentiated market competitiveness. From an industrial ecology perspective, this recovery reflected a systematic response to audience aesthetic upgrading rather than isolated successes. <Big World>, a heartwarming Film focusing on marginalized groups, earned 765 million yuan , resonating across age groups through its exploration of life's value. Meanwhile, the suspense IP <Octopus with Broken Arms> used rapid montage and short-form narrative techniques akin to short-video platforms, with plot twists every few minutes, appealing strongly to young audiences. Together, these Films effectively reversed the recent downward trend of this key release period.

In 2024, the Chinese Film market closed the year with a total box office of 42.502 billion yuan—a figure supported structurally by the Spring Festival season and also reflecting the value reconstruction achieved by traditional release periods such as the New Year season through content innovation. This milestone signifies that the Chinese Film industry is transitioning from a phase of scale expansion to one of quality enhancement. Through a creative approach characterized by genre diversity, emotional resonance, and technological empowerment, the industry acts as a mirror of the times, sensing and capturing the fluctuations of social sentiment. Amid shifting lights and shadows, it depicts the complexities and ambiguities of the present, integrating its unique expressive forms into the construction of public discourse, projecting individual emotions onto the broader temporal scale [8], and providing a clear roadmap for sustainable industry development.

3. Multidimensional Exploration of Creative Transformation: The Dual Pursuit of Social Realism and Youth-Oriented Expression

From the perspective of core industry indicators, multiple key metrics in the Chinese Film market showed varying degrees of decline in 2024 compared with 2023. On the content side, the supply of high-quality Films contracted, with a structural shortage of leading titles. At the exhibition end, a differentiated screening pattern has yet to take shape; the "split-line distribution" system initiated in 2023 achieved limited results, and theater scheduling remains highly homogeneous. Regarding market competitiveness, domestic companies continue to lag behind international leading groups with full industry-chain capabilities in areas such as content development, IP management, and global expansion. The convergence of these structural challenges has slowed market growth, indicating that "the crisis has arrived, and change is imperative" [9]. Why is this necessary? Young audiences are the main consumer group of the Film market, yet data from 2024 indicate a decline in their proportion. According to the 2024 Trends in Chinese Film Audience Changes report published by the China Film Association and Lighthouse Research Institute, viewers aged 25–29 accounted for the largest share at 27%, followed by those aged 30–34 at 20% [10]. This underscores that advancing supply-side reform in content production and pursuing multidimensional creative transformation must focus on cultivating young audiences. In 2024, Film works demonstrated clear youth-oriented characteristics in their thematic choices, narrative strategies, and audiovisual language, establishing multiple channels for dialogue with the younger generation.

Zygmunt Bauman in Liquid Modernity, reveals a social condition that offers a unique lens for analyzing audience changes in the Chinese Film industry. Within the context of liquid modernity, the stability of social relationships is continuously eroded [11], and cultural consumption exhibits pronounced dynamic differentiation. The deep integration of social realism and youth-oriented expression essentially represents the Film industry's return to the "content is king" principle, reflecting a dynamic balance mechanism among creation, market, and audience. On one hand, the aesthetic upgrading of young audiences compels creators to enhance content quality. For example, <A Place Called Silence> focuses on campus bullying, packaging social issues within a suspense framework; its tight narrative pacing and visual impact attract young viewers, while the seriousness of its themes—addressing child abduction and class conflict—generates nearly overwhelming emotional resonance. On the other hand, the rise of realism-themed Films, such as <Article 20>, directed by Zhang Yimou, delicately portrays the lives of ordinary people, guiding audiences into their world and allowing them to experience struggles and choices amid legal and emotional conflicts. This transformation not only heightens the sense of realism in Films but also enables audiences to engage in deep reflection on social issues while

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experiencing emotional resonance[12], reshaping audience aesthetic expectations and fostering a virtuous cycle where high-quality content cultivates a mature viewership.

In terms of thematic positioning, with the continuous rise of female audiences, feminist Films such as <Herstory>, directed by Shao Yihui, and <Like A Rolling Stone>, directed by Yin Lichuan, have garnered widespread attention. These works transcend traditional narrative frameworks, placing women's personal growth and self-realization at the narrative core, revealing the arduous journey from silent endurance to the awakening of self-awareness, and conveying a renewed reflection on and pursuit of their own value [13], thereby constructing a more modern female subjectivity. This creative shift stems not only from the large-scale emergence of female creators but also reflects the evolution of gender concepts amid societal structural changes. The enhanced status of women is mirrored through the diversification of female on-screen representations, forming a two-way interaction between creative practice and social thought.

Another form of innovation in the youth market is reflected in the creative adaptation of popular culture elements. <Yolo>, directed by Jia Ling, integrates themes of body anxiety and self-identity in the short-video era within a comedy framework. Jia Ling breaks the boundary between on-screen and off-screen by physically losing weight, turning the individual process of self-fitness into a nationwide emotional ritual. The Film frequently utilizes short-video platforms for promotion, generating a strong sense of suspense while reflecting young audiences' familiarity with and recognition of visual consumption patterns. This approach, which embeds media characteristics into narrative structure, signifies the active adaptation of Film aesthetics to the communication norms of the digital age. Unlike other productions, it moves beyond binary gender positioning to focus on "humanity," emphasizing human emotion. This allows audiences to genuinely perceive that character development and psychological portrayal in the Film are both grounded in life and elevated above it [14].

4. Technology-Driven Industrial Transformation: Shifts in Media Ecology and Audience Behavior

Amid the accelerated iteration of media technologies, the Film industry is undergoing a systemic transformation spanning from creative authorship to distribution logic. As scholar Chen Xuguang observes, "Film directors have evolved from 'authors' to '(industrial) system-based authors' and now to a kind of 'algorithmic author' or 'human-machine integrated' 'algorithmic director,' with the 'director-author' repeatedly undergoing a complex process of adversity, constraint, and rebirth, akin to a phoenix rising from the ashes" [15]. This shift represents a contemporary upgrade: iterative filming technologies, digitally constructed twin sets through virtual production, algorithm-driven content distribution, and data-informed scriptwriting collectively mark technology not merely as an auxiliary tool but as an "implicit author" deeply involved in narrative construction. Such developments are transforming audiences from passive receivers into co-creators of meaning. The technology-driven evolution of media ecology and audience behavior is reshaping the ontological essence of Film itself while providing critical keys for industrial upgrading.

Film technology is evolving at a rapid pace. At the same time, the explosion of AIGC technologies has made virtual digital environments feasible. Thanks to the efforts of domestic visual effects companies such as MORE VFX (MoJing TianHe) and G-KA (JiKaTe Pai), Chinese Film technology has reached a new stage. <Pegasus 2>, directed by Han Han, creates a visual spectacle through a combination of drone-mounted high-speed cameras, live-action and virtual integration, and fast-paced editing [16], setting a technological benchmark for domestic automotive Films. The Film pioneers a deep integration of real and virtual shooting in scene construction: the crew shot on location at the Bayinbuluke Grassland in Xinjiang, while simultaneously building a 1:1 scale core racetrack at the Shanghai International Off-Road Circuit. Using "virtual shooting" technology, the dynamic movement of the cars was seamlessly merged with natural landscapes, achieving internationally competitive light quality and spatial depth in motion sequences. On the technical side, the team implemented synchronized high-speed filming from both ground and air, modifying multiple helicopters to match the cars' speed while using specialized ground tracks, enabling multi-dimensional perspectives from aerial overviews to low-angle tracking shots. The production of <Pegasus 2> marks the establishment of a comprehensive technical system in China for automotive-themed Films, covering scene construction, equipment development, and visual effects application. This not only provides a replicable technical model for domestic genre Films but also advances Chinese cinema along a professionalized and standardized path, showcasing the local industry's innovative capacity and technological confidence in aligning with international standards.

In 2024, algorithmic mechanisms exerted significant influence on both scriptwriting and promotion

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in the Chinese Film industry. <Upstream>, directed by Xu Zheng, exemplifies an "algorithmic realism" Film [17], in which the team modeled workplace anxiety data from short-video platforms, transforming phenomena such as the "35-year-old crisis" into the narrative core. Pre-release promotion leveraged Douyin to create customized "comeback" clips, triggering viral flows through tagging, achieving over 100 million views within 24 hours and laying a solid foundation for subsequent box office success. The Film's shift toward "algorithm-defined" production not only expands the dimensions of realism but also prompts reflection on the balance between art and technology in tech-driven creation, offering a fresh perspective on cinematic realism in the algorithmic era.

<I Am What I Am 2>, directed by Sun Haipeng, reshapes the standards of industrialized domestic animation through groundbreaking technological innovation, with its "hyper-realistic animation" practice providing a model for technical upgrading in the industry. The Film leverages Huawei Cloud's "Render Cloud" platform to revolutionize rendering technology, mobilizing 30,000 servers for concurrent rendering and ushering Chinese animation into the era of film-level rendering. By studying and capturing real-world scenes, the team imbues character movements with strength and authenticity. At the material and lighting level, the team developed a muscle simulation workflow based on procedural techniques combined with Vellum solver calculations, ensuring that each frame's muscle shape remains unaffected by preceding or subsequent frames while resolving issues such as muscle wobble and skin sliding over muscles [18]. This approach not only advances the industrialization of domestic animation but also empowers storytelling through technology, demonstrating that true innovation allows audiences to perceive the human spirit through technical mastery and providing a new dimension for balancing technological rationality with artistic warmth in the industry.

5. Conclusion and Reflection: From Phenomenal Breakthroughs to the Construction of a Sustainable Industry

From the vantage point of contemporary currents, the Chinese Film industry in 2024 underwent a profound transformation amid the interplay of challenges and opportunities. Throughout the year, fluctuations in market data, innovations in creative philosophy, and the impact of technological waves collectively sketched a grand vision of industrial transition. Despite facing the contraction of the global Film market and drastic shifts in media ecology, global aesthetics—transcending any single cultural framework—offers a more inclusive, overarching, and universally resonant lens for interpreting cinematic art [19]. Filmmakers worldwide, with fearless courage and exceptional ingenuity, have forged paths through obstacles toward the future, injecting robust momentum into sustainable industry development and composing a resounding ode to the luminous trajectory of Chinese and global cinema.

In 2024, although the Chinese film market experienced a decline in total box office revenue, it demonstrated remarkable resilience and vitality amid structural adjustments. The brilliance of the Spring Festival period and the recovery of the Year-End season showcased the market's strong consumption potential, while the dominant performance of domestic films on the box office charts highlighted the rise of local creativity and the enhancement of cultural confidence. The breakout success of genre films, the in-depth exploration of realistic themes, and innovative approaches to youth-oriented expression allowed Chinese cinema to meet diverse audience demands while continuously expanding the boundaries of artistic expression. This structural optimization not only reflects a profound understanding of market dynamics but also marks a critical step toward the maturation of the Chinese film industry, laying a solid foundation for sustainable development. Technological innovation has become the core engine driving the transformation and upgrading of the industry: from the spectacular visual achievements enabled by virtual production technology, to the profound creative and promotional empowerment of algorithmic mechanisms, and the production paradigm shifts brought by AIGC technology, Chinese cinema has continuously pushed the boundaries of technological application. The successful practices of films such as <Pegasus 2>, <Upstream>, and <I Am What I Am 2> demonstrate that technology not only enhances audiovisual quality but also sparks creative inspiration and expands narrative possibilities. This deep integration of technology and artistry allows Chinese films to showcase a distinctive appeal on the international stage while providing robust technical support for sustainable industry development, heralding a new era in film creation and dissemination. At the heart of sustainable development in Chinese cinema lies the multidimensional exploration of creative transformation: a steadfast commitment to social realities positions films as vital mediums for reflecting the spirit of the times and conveying positive societal values, while engagement with youth-oriented expression ensures close resonance with the aesthetic preferences of younger audiences, sustaining cultural vitality. From socially relevant narratives addressing pressing issues, to innovative genre masterpieces, and to diverse stories highlighting female empowerment, Chinese cinema tells compelling stories and shapes a

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multidimensional national image through rich content and distinctive perspectives. This shift in creative philosophy not only earns audience appreciation and recognition but also enhances the cultural depth and artistic value of Chinese films, injecting continuous energy into the long-term development of the industry.

In terms of genre content, locally rooted comedies dominate the Chinese mainland market, emphasizing witty dialogue and festival-season emotional resonance, as exemplified by Yolo and Successor, two of the 2024 top ten box office hits. These films rely on dialects, slang, and cultural in-jokes to generate humor, resonating strongly with domestic audiences, yet such highly localized expression limits their international reach. Conversely, Chinese martial arts and action films, which enjoy popularity abroad, have struggled at the domestic box office in recent years, reflecting a persistent obstacle for global expansion. American comedies typically drive narratives through satire and situational setups, whereas Chinese comedies have historically relied heavily on linguistic humor; to overcome this, creators should adopt a “situation-driven, action-propelled, culturally universal” hybrid model that shifts humor from purely language-based jokes to culturally contextualized scenarios, emphasizing character behavior, social emotions, and emotional dissonance to create universally comprehensible humor. Similarly, traditional genres such as martial arts, which perform well internationally but underperform domestically, require structural innovation. The 2025 Spring Festival release The Legend of the Condor Heroes: The Great Hero demonstrates that high production investment and strong IP influence cannot compensate for reliance on outdated source material and derivative adaptations, which lack originality in worldbuilding and character design, causing audience fatigue and failing to resonate with new generations. To revitalize the genre, creators should move from replicating classics to pioneering original content, extracting contemporary chivalric values, integrating futurism, realism, and urban allegory, and exploring a “new martial arts” narrative structure. Action choreography and editing should align with modern aesthetics, thematic cores should expand to include self-identity, female empowerment, and environmental ethics, and IPs should undergo systematic worldbuilding and cross-media development to construct a culturally rich and commercially extendable “Guofeng Universe” that fosters emotional connections and cultural memory internationally. Beyond genre and content, a fundamental barrier to high-quality filmmaking lies in the talent gap and inefficient mobility mechanisms. Mainland Chinese film education emphasizes theory over practice, with outdated creative-practice curricula and weak industry–academia integration, producing graduates with artistic literacy but limited industrial production experience. To address this, the talent system must integrate content incubation, career orientation, and cross-disciplinary collaboration. Universities should reform curricula, prioritize faculty with extensive on-set experience, and introduce practical courses such as screenwriting and directing workshops while partnering with leading film companies to enable student participation in real projects. Local governments should establish youth filmmaker development funds and director talent pools to support creators rooted in local communities, while cross-disciplinary mobility from animation, gaming, literature, and short-video sectors should be encouraged to infuse films with diverse cultural and innovative perspectives, forming a closed-loop content ecosystem from idea generation to project output. By restructuring the content production chain, the Chinese film industry can enhance originality, reduce reliance on major IPs and star power, and sustainably supply high-quality content, ensuring its long-term vitality and competitiveness both domestically and internationally.

Looking ahead, the Chinese film industry needs to further strengthen top-level planning, optimize industrial layout, improve market mechanisms, and increase policy support. To construct a cinematic community aesthetic, it is essential to employ internationalized narrative techniques while highlighting national and cultural characteristics, thereby creating storytelling spaces that are both distinctive and capable of eliciting audience empathy [20]. The industry should deepen international cooperation and actively expand overseas markets, while emphasizing talent cultivation to build a high-quality, professional workforce. Only through these measures can China’s film industry maintain a competitive edge, secure its position in the global market, and achieve the leap from a major film-producing nation to a truly strong cinematic power. In this context, the future of both the Chinese and global film industries is exceptionally bright. In China’s development trajectory, cinema serves as a vital vehicle for cultural communication, bearing the important mission of telling compelling Chinese stories, conveying Chinese voices, and presenting the Chinese image. With continuous technological advancements, ongoing market improvements, and increasingly flourishing creativity, Chinese cinema is destined to step onto the world stage with greater vigor, radiating even more brilliant brilliance and contributing Chinese wisdom and strength to the development of global film art.

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