

Competition and Cooperation: A Scope Study on the Development Path and Competition Strategy of Film Industry in China

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ABSTRACT

The Chinese film industry is currently undergoing a rapid developmental phase. During this period, it is influenced not only by Hollywood but also by other global film markets. Moreover, domestic cross-border investments are showing a trend of diversification, and the competition within the film industry is particularly fierce. For the Chinese film sector to prosper in this environment, it is crucial to enhance its core competitiveness. This can be achieved through rigorous competitive strategies. This article provides a brief overview of the industry's development from a competitive strategy perspective, aiming to promote the sustainable growth of the Chinese film landscape. Special emphasis is placed on how to learn from international experiences, compete with them, and draw from these encounters. Additionally, the article delves into managing competitive relations within the industry to ensure the long-term healthy development of the film sector.

Keywords: *Film Industry, Communication Science, Film Market, Development Trajectory, Competitive Strategy.*

INTRODUCTION

Over recent decades, China's business landscape has undergone profound transformations, and Hollywood hasn't been immune to this shift. The Chinese film industry, in particular, has seen exponential growth in the last twenty years. Before diving deep into the nuances of this evolution, it's critical to begin with a panoramic view of the contemporary state of China's film sector.

Currently, China's film business holds significance on international, regional, and national scales (Wang and Lobato, 2019).

In 2018, with a growth of 9 percent to \$8.9 billion, China's box office trailed only North America's \$11.38 billion. Impressively, the Chinese film sector efficiently caters to its domestic audience, while Hollywood primarily focuses on the U.S. local market. Producers and directors from 'Greater China' (predominantly Hong Kong and Taiwan) and South Korea are eager to collaborate with the burgeoning mainland Chinese film industry. However, Chinese films often face challenges in achieving international recognition. Although these movies find promotion through festivals, independent filmmakers are increasingly grappling with stricter regulations due to recent shifts in government policies. Yet, in this flourishing scene, private Chinese corporations like Wanda have reaped substantial benefits. In a relatively short span, Wanda diversified its portfolio by acquiring the American AMC theatre network, Legendary Pictures, the British Odeon and UCI theatres, and the Australian cinema chain Hoyts, positioning itself as the world's top-grossing film company.

The monumental progress in internet technology and the expansive growth of network connections have revolutionized the film and television sectors, making content accessible to a vastly broader audience (Salvador et al., 2019). While online film critique thrives, traditional film criticism methods have seen diminished popularity. Digital platforms have overshadowed print mediums such as newspapers, magazines, and academic journals as the primary conduits for film analysis. After an embryonic phase on blogs and forums, digital film criticism saw rapid proliferation on portal sites like Douban.com. It then transitioned into an interactive era on blogs and microblogging platforms like WeChat (Luo et al., 2019). Mirroring global trends, the Chinese film industry celebrated unprecedented successes in 2020.

Your paragraph provides a comprehensive overview of the film industry's resilience in China during the COVID-19 pandemic. Here's a revised version for clarity and to reflect a native English writing style: The unexpected eruption of the COVID-19 pandemic in 2020 brought the bustling film industry to a standstill during the peak Spring Festival period. Consequently, cinemas remained shuttered for a staggering 178 days. The entire film sector languished in anticipation of recovery as a significant portion of production staff halted operations. In response, governmental bodies at national, provincial, and local levels orchestrated strategies to mitigate the pandemic's adverse impacts. Starting July 20th, theaters were cautiously greenlit to resume operations, albeit under stringent safety protocols. By August, the resurgence of the Chinese film industry was unmistakably signalled by the box office triumph of "The Eight Hundred" (Woodcock and Johnson, 2021), raking in an impressive 3 billion RMB.

The subsequent National Day holiday further bolstered the industry's confidence, with box office collections approximating 4 billion RMB. The soaring success of this film underscored the undiminished public appetite for cinema-going, pandemic notwithstanding. The production of "Sacrifice", accomplished in under two months, further bolstered faith in the resilience of Chinese

cinema. Remarkably, despite only 187 operational days, the box office for 2020 registered earnings of 20.4 billion RMB. This anomaly year witnessed the Chinese film industry's meteoric rise to global prominence. Such data corroborates that China's film ecosystem was the world's pioneer in experiencing a cinematic renaissance amidst the pandemic (Lizbetinova et al., 2019).

This paper uses a modified Ohlson model as a benchmark against which to compare an alternative valuation model featuring the disclosed components of exploration and evaluation expenditures. A sample comprising 430 firm-year observations between 2003 and 2009 is utilised.

Historical Development of China's Film Industry

The Chinese government has advocated for the commercialization of the film sector as a means to amplify domestic production, investment, and audience engagement. The overarching objective remains to uphold party control while elevating the nation's cinematic output to international benchmarks. While China hasn't made sweeping concessions, it has shown nuanced flexibility (Mody and Bhoosreddy, 1995). Anything perceived as challenging the party's ideology or market position is met with unequivocal intolerance.

Over the past two decades, China has strategically liberalized its film sector, mirroring liberalization trends in other segments of its economy. This engagement with the global market has been characterized more by deliberate calibration than by abrupt shifts. The underlying rationale is the belief that a vigilant governmental oversight can optimize the performance of film industries. By maintaining authority and making incremental adjustments to power dynamics, the government aims to guide the film industry in a direction that serves national interests, rather than being susceptible to external influences.

Past research anticipates that expenditure on cinema and related entertainment will increase in congruence with rising income brackets. As domestic consumption swells, the proportion of box office revenues accrued by domestic studios is expected to climb proportionally. A robust foundation for the film industry within domestic confines will inevitably strengthen its position on international frontiers. It's apparent that extrinsic factors, beyond China's immediate control, have implications for the industry. Both the individual financial health of Chinese households and the broader national economic landscape will significantly influence the industry's vitality. Unlike some other industries, it is imperative for China's film industry to transition towards self-reliance, as opposed to remaining predominantly import-oriented (Budzinshi and Kuchinke, 2018).

FINDINGS

The Competition Strategy

Prior to the 1980s, the notion of competition was largely understood in isolation from other

concepts. The ultimate aim was to bolster overall efficiency, with victorious entities outperforming their adversaries to secure maximum rewards. It wasn't until 1989 that Raymond Noorda introduced the term "co-opetition," sparking a broader discourse. Noorda posited that co-opetition transcends traditional competitive frameworks, functioning instead as a strategy that melds the benefits of collaboration with the dynamics of competition.

The 1996 publication, "Cooperative Competition," anchors the genesis of co-opetition theory. Here, it is argued that rivalry and co-opetition are intertwined, symbolizing a fresh paradigm of inter-firm relations. Moreover, game theory has emerged as the foundational mechanism for sculpting co-opetition strategies (Kubler et al., 2021). For industries like film, enterprises must judiciously choose their consumers, upstream and downstream entities, competitors, and complements. This strategic selection aids in dismantling barriers, fostering value creation, demarcating industry segments, optimizing profit distribution, and advancing into uncharted territories.

This framework of co-opetition has evolved as a contemporary paradigm, standing in tandem with earlier models. Chinese scholars in the 21st century have carved out a niche, dedicating rigorous study to this form of rivalry. They expound on the merits of co-opetition, emphasizing its role in strategic decision-making within enterprises. Business co-opetition isn't merely a transient phenomenon; it's integral to an entity's trajectory, facilitating optimal resource distribution, risk mitigation, cost efficiency, and innovation. It amplifies both product-focused and holistic competitive prowess.

Kweon (2021) provides a perspective through the lens of game theory. He underscores that businesses can thrive in a co-opetition-driven environment. The approach resonates as a non-zero-sum collaborative game, capable of achieving a Pareto-optimal solution that benefits all stakeholders.

In essence, "co-opetition" encapsulates a growth-centric interrelation, transcending the confines of zero-sum dynamics. It pivots from a sheer adversarial contest to a model that intertwines competition with cooperation, ensuring both entities can potentially achieve mutual benefits.

The Situation of the Chinese Film Industry

The growth of the Chinese film industry in recent years has been remarkable. In 2016, while the American box office saw a rise of 2.2 percent, the Chinese film market expanded by an impressive 3.76 percent. Between 2013 and 2016, China's box office revenues surged, more than doubling from \$3.13 billion to \$7.1 billion, maintaining an average annual growth rate of around 30 percent. This strong momentum augurs well for the continued rise of China's cinematic landscape.

Meeting the burgeoning demand, construction of new theaters has surged nationwide. To illustrate, while China had only 1923 screens in 2003, this figure rocketed to 4.12 million by 2006. In 2016 alone, the industry added another 9552 venues. This proliferation of theaters and screens has significantly facilitated the industry's expansion.

However, it's essential to recognize that despite its meteoric growth over the past decade, China's film industry still trails the world's leading producers in several areas, including investment in the film value chain, production quality, distribution, exhibition, and the development of derivatives. In comparison to industries in developed countries, China's cinematic realm has room for growth and strengthening. Adopting a competitive strategy might offer avenues for transformation and enhancement (Stefanone, 2019).

As highlighted by Garg and Harita (2020), the film production in 2020 not only continued its downward trajectory from the preceding two years but also grappled with the pervasive impacts of the pandemic. Throughout the year, 531 full-length films were produced. Factoring in animations, scientific and educational films, documentaries, and specials, a total of 650 films from the United States received public screening permits—a reduction of 37.5% compared to the previous year. Given the increasing trend towards online-exclusive releases, the decline in theatrical film production seems poised to persist, as visualized in Figure 1.

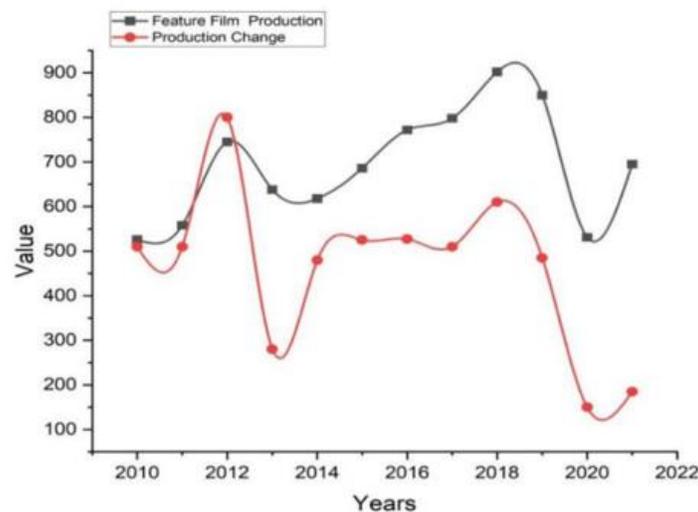


Fig 1 Change in mainland feature film production from 2010 to 2021

Multi-level Communication Science Strengthens the Communication Effect

The advent of the Internet has revolutionized communication norms and methods, transitioning from a linear pathway to a multifaceted one. There's been a marked evolution from centralized, one-way communication to a decentralized, multi-tiered system (Gilbert, 2021). The

practice of reviewing films on Weibo signifies the onset of the "Everyone is we-media" era. Weibo enables dynamic interactions between movie industry stakeholders and the general audience. As film criticism transforms from a one-sided narrative to a layered dialogue, audience impressions are shaped more by peer discussions than media outlets. Furthermore, the active Weibo audience facilitates a cascading effect in disseminating movie reviews. For instance, when a user comments on a critic's post, it spawns additional dialogues, leading to even deeper levels of discourse. Thanks to its inherently interactive nature, Weibo enables a layered communication model for film reviews, constantly reshaping perspectives and amplifying the communicative impact (Kokas, 2018).

The Threat to the Chinese Film Industry During the Development

The rapid growth of the Chinese film industry is accompanied by several challenges. While competition from European and American films intensifies in China, local movie enterprises often fall short in areas like innovation, industrial proficiency, and the development of spin-off products. At the same time, the Chinese market has seen an influx of international resources. For the Chinese film industry to elevate its competitiveness, these gaps must be addressed (Craig et al., 2021). Figure 2 provides a detailed visualization of the challenges facing the Chinese film industry.



Fig 2 Threads of the Chinese film industry

a) Film industry internationalization led foreign films to seize the domestic market

The US film industry sits comfortably in its maturity, with domestic box office revenues accounting for only 20-30% of its total earnings. Instead, it largely profits from extended windows and credit default swaps, ensuring its global leadership (Eilstrup, 2019). Hollywood's reach extends internationally, with a particular emphasis on emerging markets like China. Following a

WTO-related resolution, China agreed in 2012 to increase the number of 14-part budgets above the 20 sales quota for 3D or IMAX films, raising its box office revenue share from 13% to 25%. This agreement could boost the US film industry's earnings by billions annually. As this Memorandum of Understanding (MOU) takes effect, Hollywood's influence on the Chinese market is set to grow.

China's film industry, though burgeoning, is in a transition phase similar to Hollywood's transformation in the mid-20th century (Ahmed et al., 2020). A challenge it faces is its heavy reliance on box office revenues, as its derivative industry chain remains underdeveloped. For now, China is primarily on the defensive against Hollywood's dominance. The strategy is twofold: learning from Hollywood's advancements while enhancing China's own industry chain.

Many Chinese film studios prefer collaboration over competition with Hollywood, seeking advanced insights (Ozcan and Hannah, 2020). Hollywood, recognizing China's enormous potential, is eager to penetrate its market. However, local regulations limit Hollywood's direct access, necessitating collaboration with Chinese studios. Still, it's evident that Hollywood remains more competitive than its Chinese counterpart (Tafesse, 2021).

Each observation measures one or more properties (such as weight, location, colour) of observable bodies distinguished as independent objects or individuals. In survey sampling, weights can be applied to the data to adjust for the sample design, particularly stratified sampling. Results from probability theory and statistical theory are employed to guide the practice. In business and medical research, sampling is widely used for gathering information about a population. Acceptance sampling is used to determine if a production lot of material meets the governing specifications. The use of the lot acceptance sampling plan (LASP) represents a good practice in quality control because "it enables undoubted conclusion on the lot's disposition based on counting the number of defectives in a sample picked from a lot randomly."

b) Industrial extensive development led to weak domestic enterprises' competitiveness

The Chinese film industry, although growing, still lags its U.S. counterpart. With a plethora of businesses vying for attention, major players often find themselves in fierce competition with smaller and medium-sized entities. Presently, film enterprises in China can be categorized into three groups based on their roles in the industry: full-function, multi-function, and single-function. A "full-function" enterprise handles production, distribution, and screening, while "multi-function" businesses manage two of these tasks, and "single-function" ones focus solely on one (Shahabaz and Afzal, 2021). This classification paints a vivid picture of the industry's intricate dynamics.

Multifunctional companies tend to have an edge over single-function ones, primarily due to their broader scope of operations. However, both can leverage specific improvements to up their game.

The market sees more competition than collaboration, given the dominance of full-function enterprises. These comprehensive companies, thanks to their vast resources, can seamlessly navigate the industry, securing a larger market share. It's crucial for both single and multi-function entities to pinpoint and solidify their unique strengths to thrive in this competitive landscape (Dastidar and Elliott, 2020).

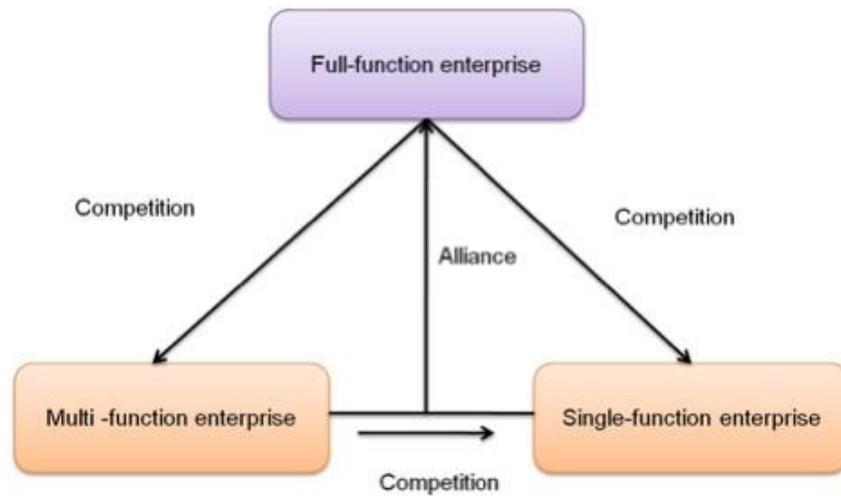


Fig 3 Relationship of 3 types of enterprise

The Chinese film industry faces stiff competition from other industries, including those that provide more traditional business services. Competition exists between multi- and single-function businesses because the former must find advantages in the latter to fill in the gaps in the industry chain and counteract the film industry pressure exerted by the latter. The latter must also keep up some level of competition to prevent the single-function business from expanding and seizing film industry share as shown in figure 3 (Herbert et al., 2019).

c) The decline in barriers led to more intense cross-border competition

The rapid evolution of the film industry has seen an influx of companies from diverse sectors trying their hand at film production. Notably, tech behemoths like Tencent have ventured into the Chinese film landscape. While the entry of these foreign entities enriches the industry's diversity and broadens its horizons, it also amplifies competition, necessitating businesses to be more innovative and strategic to remain competitive (Church et al., 2018).

These newcomers, primarily seasoned leaders in their original domains, do not merely transition into film for expansion or profit. They also aim to enhance their brand's prestige. Their entry presents a significant challenge to traditional movie studios. They bring along expertise and state-

of-the-art technologies from their primary sectors, giving them an edge. Internet-centric firms, in particular, harness the power of online distribution channels more efficiently than their conventional counterparts.

Consequently, traditional film entities face an uphill battle. To stay relevant, they must capitalize on their longstanding experience in the industry, bolster their capabilities, and commit to continuous learning and innovation. A rising trend points toward collaborations between these global businesses and existing production studios, suggesting a more inclusive future for the film sector (Li and Zihan, 2022).

How to Realize Competition in China's Film Industry

For the Chinese film industry to realize its maximum potential, enhancing core competitiveness is crucial. One effective strategy is to adopt a 'co-opetition' approach, a blend of cooperation and competition. Figure 4 illustrates the competitive dynamics within China's cinematic landscape.

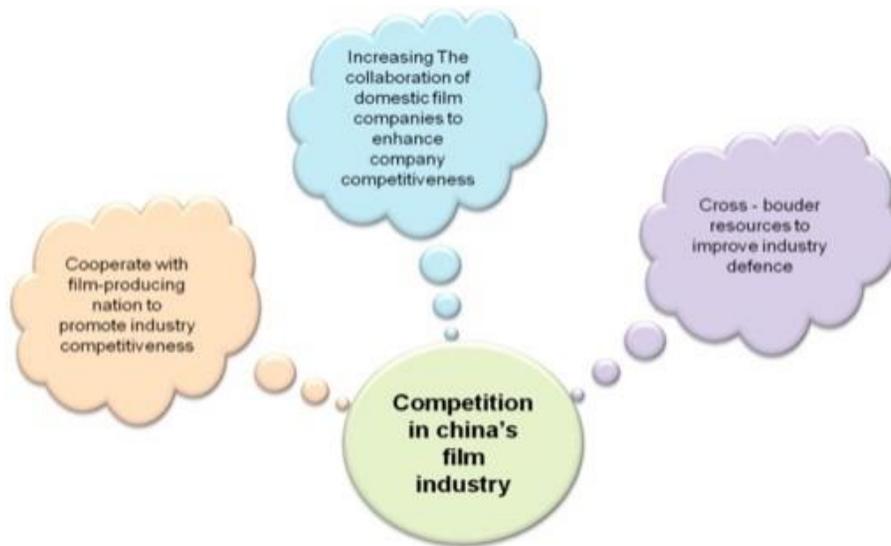


Fig 4 Competition in China's film industry

a) Deepen cooperation with the film developed countries to improve the competitiveness of the industry.

In the evolving global cinematic landscape, the Chinese film sector is confronted with the imperative of enhancing its competitive edge vis-à-vis established film industries of the West. This necessitates not only the assimilation of avant-garde methodologies and technological advancements but also a strategic positioning within the international cinematic milieu. Presently, the locus of competition predominantly emanates from capital influxes of domestic corporate

entities, which, while invigorating the industry, concurrently introduce multifaceted challenges. These encompass lacunae in project oversight, a rudimentary comprehension of foundational cinematic elements, and an accentuated learning gradient (Harris, 2018).

Particularly in realms marked by a paucity of collaborative endeavors, such as derivatives development, there is an exigency for amplifying competitive stimuli. Contrastingly, when positioned against cinematic powerhouses like Hollywood, the interconnections of the Chinese film industry within the global cinema matrix appear to be in embryonic stages. An intriguing proposition for nations aiming to counteract Hollywood's cinematic hegemony might be the formulation of synergistic coalitions. Such competitive frameworks, while ostensibly antagonistic, hold the potential to engender transnational dialogues and foster intercultural reciprocity via the filmic medium. Thus, within the broader schema of the Chinese film sector and its international peers, the paradigm of cooperative engagement might be more salient than sheer competition (Garro, 2020).

b) Deepening the cooperation of domestic film companies to enhance the competitiveness of enterprises.

To enhance the global competitiveness of China's film industry, it is imperative to bolster the capacities of domestic production entities. Notably, there exists a conspicuous disparity in the industry's power dynamics: major corporations wield considerable influence, shaping cinematic trajectories, while nascent enterprises grapple with restrictive growth opportunities (Burroughs, 2019).

While behemoth entities can capitalize on strategic mergers and acquisitions, the smaller and mid-tier firms might find value in forging pragmatic business alliances amidst this cutthroat environment. Large enterprises possess the potential to counterbalance Hollywood's cinematic hegemony by fostering robust competition and synergizing resources.

In a strategic move to mitigate industry volatilities, alliances amongst Small to Medium-sized Enterprises (SMEs) consolidate entities with aligned objectives, empowering them to present a unified front against colossal adversaries in the cinematic arena (Salihu and Zayyanu, 2022).

Illustratively, a notable "Universal Film Distribution Alliance" has been recently inaugurated by stalwarts like Jiangsu Happy Blue Sea Cinema Line, Henan Oscar Cinema, and Sichuan Film Company. This collaborative endeavor, precipitated by the escalating requisites of distribution and cinematic production sectors, embodies the industry's collective aspiration to adeptly navigate competition, capture market share, and fortify their institutional foothold (Hadida et al., 2021).

c) Integration of cross-border resources to enhance the industry's defensive ability.

The film industry faces challenges not only from internal competitors but also from newcomers to the cinematic landscape. Recent ventures by major tech companies serve as a testament to this trend. Tencent, for instance, has inaugurated Tencent Film Co., Ltd. and Penguin Film Co., Ltd., while Alibaba has established Ali Film Co., Ltd. These internet behemoths are strategically deploying their vast resources to cast a significant imprint on the film industry.

In response to such disruptions, traditional film enterprises are advocating for aggressive cross-border collaborations. They aim to exploit their industry expertise by partnering with international counterparts, fostering co-productions, and averting direct confrontations with these formidable new entrants. Such strategies are envisioned to not only counterbalance the influence of these tech giants but also to secure a dominant position in the evolving cinematic ecosystem. A salient example of this approach is the Time Network's collaboration in the film derivatives, cinematic production, and theatre convergence sectors, with the overarching goal of fostering mutual benefits for all stakeholders.

Shifting focus to theatrical releases, 2020 witnessed a total of 280 films gracing cinema screens. A staggering 200 of these were domestically produced, commanding an impressive 84% market share and accumulating box office earnings of 17.150 billion RMB. The year also observed a notable decline in foreign film imports, attributed primarily to the curtailed global film supply amidst unprecedented challenges. Only 64 international releases materialized, contributing 3.26 billion RMB to the box office, which constitutes a mere 16% of the total revenue. This data underscores the fact that 2020 marked an epochal moment for domestic films, with their market share reaching unprecedented heights (Bhimani et al., 2019). Figure 5 elucidates the contrasting market share dynamics between domestic and imported films.

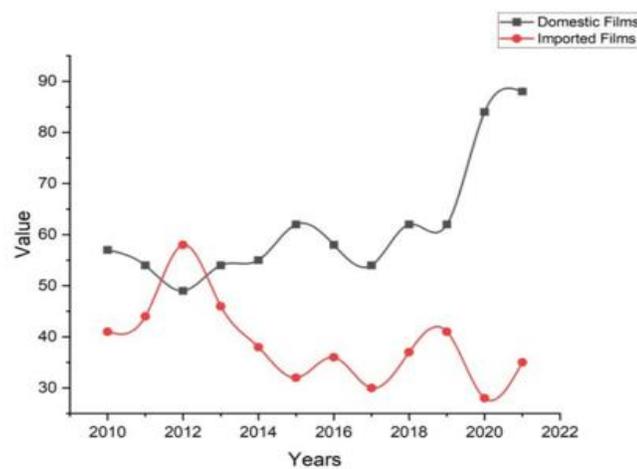


Fig 5 Market share of domestic and imported films, 2010–2022.

CONCLUSION

In the dynamic and complex realm of the film industry, the nexus between strategic collaboration and competition has emerged as a pivotal fulcrum. Embracing a win-win development philosophy offers industry stakeholders an innovative strategy to neutralize the potentially deleterious ramifications of rivalry. This is exemplified by the principle, as articulated by Pace, Noemi, et al. (2018), that "one plus one is greater than two." Implementing this philosophy has the potential to not only catalyze synergistic alliances but also empower individual entities. Furthermore, this approach could serve as a blueprint for judicious resource allocation, ensuring both diversity and balance within the industry.

While the Chinese film industry has made significant strides, it remains in the shadows when compared to the well-entrenched edifice of Hollywood. To illustrate, in 2020, domestic films in China dominated with an 84% market share, generating 17.150 billion RMB, a testament to the industry's burgeoning capability. However, the limited number of international releases underscores the need for enhanced global collaboration and competition. Rather than perceiving this disparity as a mere shortcoming, it should be construed as a unique opportunity. The challenges and gaps present an invaluable learning curve for Chinese filmmakers and entrepreneurs. By dissecting and internalizing strategies from global counterparts, especially from dominant players like Hollywood, the Chinese film sector can recalibrate and refine its modus operandi. Such iterative learning can galvanize the industry's overarching competitiveness, setting it on a path of sustained, robust growth.

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