

Analysis and Thinking of the Summer Film Market in 2024

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Abstract: Whether a film can provide emotional value to meet the emotional needs of the audience has become an important criterion for the audience to choose and judge the film. This is the distinctive feature of the 2024 Film Summer Festival, which also reflects the profound structural changes that are taking place in the Chinese film market. China has accumulated useful experience in the distribution of films by different lines, and the continuous emergence of new directors has brought vitality and impetus to the high-quality and sustainable prosperity of the film industry. Many film creators are striving to step out of their creative comfort zone and bring more possibilities to domestic films with the expansion of subject matter types. New themes and new ways of expression have brought a new look to the development and upgrading of China's film industry, and will also shape and influence the pattern of audiences.

Keywords: Summer festival; Film market; Analysis and thinking

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1. The new characteristics of the 2024 summer film market

More than 80 films were released in the Summer of 2024 in a variety of genres, covering realism, love, youth, crime and other themes, among which there are many highly discussed works such as "Successor," "Upstream" and "A Place Called Silence." Successor, in particular, has earned more than 3.2 billion yuan at the box office, becoming a "dark horse" in the market. Its box office success lies in its profound reflection on family education and social anxiety, which caters to the audience's emotional needs and raises realistic issues. This structure allows us to see that films are not only entertainment products but also a reflection of social phenomena.

1.1. Emotional value is an important index of film-watching

According to Jeffrey Bailey, a professor at the University of Idaho in the US, emotional value consists of the contrast between the positive emotions viewers get and the negative emotions they encounter during the viewing process^[1]. In this regard, through the protagonist's educational anxiety and family difficulties, Grab has successfully aroused the audience's inner resonance and achieved positive feedback of emotional value.

Films like “Life on the Wrong Side of the Road,” by showing the difficulties of the bottom workers, have triggered a broader social resonance, allowing the audience to have a more profound thinking about real life.

1.2. The comedy element is prominent in the film

Comedy is not only a superficial effect, but also a deep reflection on social issues ^[2]. From the lighthearted humor of “I’m Not Going to Be Friends with You” to the tragicomic plot setup of Life on the “Wrong Side of the Road,” comedy is presented in a way that helps the audience think about the hardships of life amid laughter. In particular, “Life on the Wrong Side,” with its true portrayal of the bottom life and occasional humorous treatment, makes the film interwoven with laughter and tears, so that the audience will not feel depressed.

1.3. Films are catering to the needs of young people with Eighth-Grader Syndrome

This phenomenon is particularly evident in the high participation of “Evacuate from the 21st Century” and “The Traveller.” The youthful dreams, friendships and growth depicted in the films are highlights that resonate with young audiences ^[3]. Through vivid characters and intense plots, these films not only show the rebellious spirit of young people but also subtly break the dimensional wall, allowing people to enjoy a relaxing laugh while reflecting on their belonging and identity in society.

2. The current situation of the summer holiday film market in 2024

2.1. Box office revenue and number of filmgoers

China’s film market has experienced ups and downs in recent years, according to the Analysis Report on the Status Quo and Future Development Trend of the Film Industry 2024–2029 by China Research Industry Research Net (ChinaIRN) ^[4]. In 2023, the domestic film market began to improve, with the box office reaching 54.915 billion yuan, which increased by 82.6% from 2022. The box office also showed a steady growth trend in the first few months of 2024, showing a sustained recovery in the film market. In terms of attendance, the average number of filmgoers in 2023 reached 10.1, an increase of 3.1 from 2022, reflecting the gradual recovery of audiences’ enthusiasm for films.

2.2. Market competition pattern

China’s film industry has formed several competitive echelons, among which Wanda Pictures is in the first echelon of leading industries, with a box office of more than 5 billion yuan; Hengdian, CGV and Dadi are in the second tier; Broadway Cinematography, etc., are in the third tier.

In terms of theaters, theaters such as Shenzhen CINESKY New Sky Cinema Double IMAX, Shenzhen Broadway Cinematheque (IMAX in the MIXC mall) and Beijing Capital Cinema (Xidan LED giant screen) topped the box office rankings.

2.3. Policy support and industrial development

The Chinese government exerts great importance on the development of the film industry and has introduced a series of policies and measures to support its development. For example, the 14th Five-Year Plan for China’s Film Development issued by the State Film Administration calls for promoting the high-quality development of Chinese films and enhancing the voice and influence of Chinese films in the global film landscape. Local

governments have also actively introduced relevant policies to promote the development of the local film industry ^[5]. For example, Guangdong, Jiangsu and Zhejiang provinces have promoted the construction of local film and television bases or film academies, providing strong support for the development of the film industry.

2.4. Market challenges and opportunities

Although China's film market has made remarkable achievements, it still faces some challenges. For example, the trend of younger films is slowing down, and the growth of young audiences is lagging ^[6]. Factors such as the insufficient supply of head films and changes in audience consumption concepts following changes in the socioeconomic environment may affect the future development of the film market. However, with the rise of new media such as short video platforms, film promotion channels have been expanded. At the same time, audiences' demand for high-quality films is also increasing, providing new opportunities for the development of the film industry ^[7]. The market development status of China's film industry is characterized by a steady recovery, the dominance of domestic films, a diversified competitive landscape and policy support. In the future, China's film industry will continue to face both challenges and opportunities.

3. The reasons for the factually depressed film market in 2024

From 2011 to 2024, China's film box office has experienced a steady rise, decline and recovery. According to IIMedia Research, from 2011 to 2019, the domestic box office rose from 11.79 billion yuan to 64.27 billion yuan year by year; However, due to the impact of the social and economic environment, the domestic film box office from 2020 to 2022 will only be 20.42 billion yuan, 47.26 billion yuan and 30.07 billion yuan respectively, and the film market has been in a downturn ^[8]. In 2023, the domestic film market recovered its vitality. According to the statistics of the China Film Administration, the total box office of domestic films in 2023 was about 54.9 billion yuan, an increase of about 83%. By the first half of 2024, the country's total box office stood at 23.773 billion yuan, a decrease by 9.51%. This year's summer box office is far lower than the same period in 2023, even decreasing by 34.51% compared with the same period in 2019.

3.1. Lack of blockbuster domestic films

Although 26 films grossed more than 100 million yuan during the release period, except for "Successor," which grossed more than 3.2 billion yuan, the box office of other films failed to break the 1.5 billion mark. In the summer of 2023, the top 5 films are: "No More Bets" 3.526 billion yuan, "Lost In The Stars" 3.523 billion yuan, "Creation of The Gods I: Kingdom of Storms" 2.481 billion yuan, "Never Say Never" 2.204 billion yuan, "Chang An" 1.799 billion yuan. A sufficient supply of head films is the necessary condition for the full play of the effect of the summer festival.

3.2. The diversion of short plays and short videos and the rise of cinema viewing costs

Short videos, with their short, concise, and diverse contents, have quickly attracted the attention of a large number of users and also affected the audience's fragmented habits in information reception and processing to a certain extent. Therefore, the rise of short videos may reduce the audience's time and willingness to go to the theater to watch long films. On the other hand, rising ticket prices have discouraged audiences from going to the cinema. Lighthouse data shows that the average ticket price for this summer season reached 40.9 yuan, compared with 40.8 yuan in 2023, 37.8 yuan from 2021 to 2022 and 35 yuan from 2017 to 2019. On the one

hand, it takes time and money to enter the theater, and on the other hand, it is rich and diverse film resources and explanatory videos on various video platforms, and many consumers have become more cautious about entering the theater to watch films.

It can be seen that at a time when short videos dominate users' attention and audiences' demands for films are getting higher and higher, the key for China's film market to recover vitality and achieve sustainable development is to improve the quality of films. According to data from iiMedia Research, 48.63% of Chinese netizens chose Story and Plot as the most concerned aspects of watching film and television works in 2024. In the summer of 2023, the realist films "All Or Nothing" and "She Is Gone" are favored. According to the analysts of IIMedia Research, films with practical significance, relevant social topics and emotional value are breaking circles and becoming the mainstream aesthetic in the current film market.

4. Thoughts on the 2024 summer film market

4.1. Try your best to meet diversified film-watching demands

Many films released this summer provide positive emotional value to audiences by stimulating different emotional points. By telling the story of Rong Jinzhen, who has a talent for mathematics and dedicates her life to code-breaking, the film "Decoded" conveys overall national interest^[9]. The film vividly depicts Rong Jinzhen, Lao Zheng, Xiao Li Li and other characters, reflecting their dedication to the country, and expressing high respect for many heroes who silently contribute to the country. The delicate presentation of different levels of emotion, such as family, affection, friendship and love, is an important focus point of this summer's films. The dialectical relationship between the emotional value and aesthetic value of the film needs to be carefully grasped by the creators. Paying too much attention to the emotional value of the film and diluting the aesthetic value of the film itself will not only change the film-watching trend but also fundamentally affect the relationship between the film and the audience from the perspective of long-term development^[10].

4.2. Viewing reality and reflecting public life through works

According to the results of the ninth National Survey on the status of the workforce, the number of newly employed workers in the country reached 84 million, and these workers have become an important part of the workforce. New employment workers are mainly truck drivers, online car drivers, couriers, takeout delivery workers and other groups, and their stories deserve to be written by the creators. The film "Upstream" takes takeout delivery workers as the main body of the film performance^[11]. In the film, the protagonist Gao Zhilei, faced with a series of sudden changes, chooses to become a delivery man, to change his choice and the starting point of his retrograde life. The film also shapes the personality images of different take-out workers such as Zhu webmaster, Order-king Dahei, and Lao Kou, which reflects the various aspects of life. Through the group images of take-out delivery workers shaped by the film, the audience can see the human feelings in daily life and the ordinary people struggling to move forward in life. The film "A Place Called Silence" is shown in the way of a direct attack on the scene and a cause-and-effect closed-loop narrative, reflecting the harm caused by campus bullying. The film "Gold or Shit" tells the story of a young screenwriter's homecoming situation in the way of life flow. The film "Evacuate from the 21st Century" uses the shell of science fiction to wrap up the blood and responsibility of three teenagers.

Audiences' demands for watching films are increasingly diverse, which is reflected in this year's summer film season. In this era of rich and varied choices, the audience's aesthetic level and needs have become

more refined. Films immersed in past cognition make it difficult to achieve effective communication and two-way interaction with the current audience. New themes and new ways of expression bring a new look to the development of Chinese films and industrial upgrading, and will also shape and influence the pattern of audiences.

4.3. Attach importance to finding new growth in the market

The traditional film distribution model is usually large-scale simultaneous release, which often fails to meet the diverse needs of different regions, different theaters and different audience groups. Splintered distribution releases films in a targeted manner according to the different characteristics of different regions and the preferences of the audience, so that some niche films that might otherwise be overlooked have more opportunities to meet the audience ^[12]. This summer, the revolutionary historical theme film “The Beginning”, the dance drama film “The Eternal Wave,” the drama film “Madam Xian,” the children’s film “Chocolate and Butter Sculpture” and so on, through the distribution of the way, “find” the audience more accurately. The multi-dimensional presentation of the reality of the summer film represents the efforts and development of the film creators in the pursuit of realism. Realism creation has no relatively fixed mode, and the complicated reality should also be presented by multiple realism styles. The field of expressing reality should be broad, and the artistic means of expressing reality should be diverse. The creator should get rid of the shoe-scratching performance, and let the audience see multiple aspects of reality through the film, at the same time, get emotional healing, and obtain the power of positive life ^[13].

5. Conclusion

Statistics show that the average age of filmgoers in the film market is rising. For the summer season, when young audiences are an important consumer group, how to attract more audiences with better quality films deserves further consideration and research ^[14]. Micro short plays and short videos not only shape the audience’s aesthetic preferences but also divert high-quality film resources to a certain extent. These new changes are affecting the development of films. New technologies, including artificial intelligence, will bring great changes to film creation, which is worth our continuous exploration and research ^[15]. Since China’s film industrialization reform, it has experienced more than 20 years of high-speed and stable development. Chinese films have confidence and resilience. In the face of new changes and challenges, filmmakers should continue to give full play to their creativity and imagination, take the initiative to explore the artistic space of films, enrich the expression ability of film language, enhance the appeal of film works, and enable Chinese films to form a more benign interaction with the audience.

Disclosure statement

The author declares no conflict of interest.

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