

Research on the Development Status and Strategies of Micro Web Series in China

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Abstract

In the era of "micro", the popularity of short video platforms provides a reasonable basis for developing micro web series, and the fast-paced life makes users more inclined to receive the piecemeal audio-visual experience. Along with the complement of network audio-visual industry developing planning and policies, the improvement of content audit system, the maturity of streaming technology, and the drive for content innovation, China's micro web series market has shown vigorous development. The short video platforms have provided distribution channels for micro web series, the comprehensive video platforms have joined to make the micro web series boutique, and the theatrical operation and support programs of platforms have provided a standardized and orderly market environment for micro web series. However, there are still shortcomings in the quality of episodes, policy regulation, cashing mode, content depth, and marketing channels. Micro web series is still relatively new, and little research has been conducted in this field. Therefore, it is necessary and innovative to study the development status of the micro web series. Meanwhile, this study puts forward development strategies such as branding and quality construction of micro web series to promote the healthy development of China's micro web series industry.

Keywords: micro web series, development status, dilemma, development strategy

1. Introduction

As the public audio-visual experience has gradually shifted from traditional to emerging media platforms in recent years, users' demand for piecemeal, fast-paced, and fiercely entertaining content has become increasingly intense. As of December 2021, the size of Chinese short video users has reached 934 million, accounting for 90.5% of the overall Internet users in China. Currently, the per capita single-day usage time of Chinese short video users has reached 125 minutes, occupying the top of the list of network audio-visual products. The short video platforms have become the main channel for information dissemination, showing a diversified development trend.

With the innovation of communication technology, network audio-visual products are developing rapidly. In order to adapt to the fast-paced life habits of today's users and the multi-speed viewing experience scene, short video platforms have changed from the single function to multiple composite functions and started to explore new areas, such as e-commerce, live streaming, and web series. As a result, a new category of web-based content—"micro web series", which is highly characteristic of Internet content distribution, has been spawned.

Micro web series is a kind of web series with a single episode length of 10 minutes or less, using the mobile terminal as the leading distribution channel. As a product of the integration of short video and web series fusion, the micro web series is light, interactive, widely distributed, fast-paced, and can bring users instant visual pleasure and a high concentration of emotional experience in a piecemeal time.

At present, the promulgation of the relevant policies of the SARFT and the entry of the industry's leading platforms have created a suitable space for developing micro-short dramas in terms of quality and volume. With the arrival of the era of micro web series, how to improve the platform policy, optimizing the cash model, and improving the quality of episodes are important for promoting the transformation of Chinese micro web series into the mainstream by removing the brown and extracting the essence.

2. The Characteristics and Classification of Online Micro Web Series

2.1 Two-Way Integration: The Main Features of Online Micro Web Series

Micro web series is a lighter expression of web series in the field of short videos, so it combines the strengths of short videos and online TV dramas. It not only meets the piecemeal communication and entertainment characteristics of short videos, with shorter single episode length, lower production cost and more compact narrative rhythm, but also has the integrated structure and professional qualities of web series, with more professional filming methods, more prominent episode themes and stronger visual perception. It meets the diversified needs of users watching web series on mobile. The characteristics of two-way integration are reflected in the following five aspects:

- The single episode length of the micro web series is shorter than other web series, and many types of topics can meet the diversified needs of users watching web series on mobile.
- Micro web series have distinct themes, dense emotional points, refined narratives, and rich camera language. So it usually brings users a strong visual experience through fast-paced episodes.
- Micro web series are highly interactive and have a wide distribution range. Users can interact with the episodes through likes, pop-ups, comments, and repost. The small-scene camera language closes the visual distance between users and the main characters, bringing users a strong visual impact and an immersive drama viewing experience. Because of the free operation and multiple channels of sharing and reposting, micro web series can achieve instantaneous secondary dissemination and realize the fission of dissemination range under the social network of mobile Internet. Therefore, micro web series have a wide space for dissemination and have become the new trend of light media consumption.
- The low entry threshold and short production cycle of micro web series reduce the pressure on creative teams. This low investment and quick return feature attract many investors and quality content creators to join the production of micro web series, bringing users more diverse choices. The competition among micro web series also helps promote the quality of its content. Because of the low production cost, the micro web series is rapidly updated. So it is easier to match the current hot spots and users' preferences during the production process, which is conducive to producing high-quality micro web series and the birth of popular hit web series.
- Micro web series has the characteristics of high quality. The entry of long-form video platforms has brought benign competition to the micro web series industry. Nowadays, the professional filming team and long-standing rich production experience have enabled micro web series to shift from UGC's rough production to PGC's refined production, from script creativity and shooting environment to actor makeup creation, editing and dubbing are increasingly becoming high-quality, catering to the aesthetic needs of users.

2.2 The Classification of Micro Web Series

Micro web series can be divided into ten types according to their contents: romance, lifestyle, family, suspense, comedy, workplace, fantasy, friendship, anime, and family fun. Among them, the romantic TV series is the mainstream micro web series on video platforms, mostly adapted from web fiction IPs or scripted according to the narrative mode of web fiction. According to the differences in presentation, micro web series can be divided into three categories. One is to start the main storyline with the same protagonist, which usually has the same theme and the independent content in the consistent episodes. One is to have a consistent theme, but each episode has different protagonists and independent plots. Generally, there is a theme in a single episode or a complete story within two or three episodes. Another one is that the protagonist of the series are consistent, and the plot is continuous, similar to the presentation of movies and TV series. This kind of content is mainly adapted from web fiction.

3. The Current Situation of the Development of Chinese Micro Web Series

Comedy as the core, independent plot and strong stage sense are the main style of the early Chinese micro web series. Its origin can be traced back to as early as 2012, when China's first influential web talk show, "Dapeng Show" launched its derivative sitcom "Diors Man" on the "Sohu" video platform, and each episode is about 15 minutes. With the traffic base, since its premiere has gained wide attention. In August of the following year, "Youku" launched a 5-minute episode of "Surprise", which also chose exaggerated and humorous comedy themes but optimized the content and length with a faster pace, smaller volume and more intensive stems. It received tens of millions of plays in a single day and over 100 million hits in 24 days. Currently, most of the micro web series is produced by professional teams, broadcast through comprehensive video platforms, and promoted to PC users.

With the advent of the mobile Internet era, short videos that highly meet the needs of users' daily habits and interests are developing rapidly, which brings new opportunities for the large-scale development of micro web series. In 2018, a micro web series called "The Legend of White Fatty", starring comedian Yue Yunpeng and Sun Yue, was featured on short video platforms such as "Tik Tok" and "Kwai", which made a preliminary exploration of the production model of star effect with professional teams to produce high-quality micro web series. Subsequently, comprehensive video platforms, leading specialized Film & TV production companies and MCN teams all began to lay out micro web series. A micro web series "Tong Ling Fei" produced by "Wesee" at the end of 2019 quickly broke 100 million online, while "Wonderful Museum" on the Tik Tok harvested more than 10 million fans after two months of updating. These marked the complete entry of micro web series into the ranks of popular web audio-visual products. Since then, micro web series have shown unprecedented development momentum.

3.1 The Leading Short Video Platforms: Seize the Preemptive Opportunity to Take Shape

"Kwai" has a certain foresight for the layout of the micro web series. As early as 2019, Kwai launched the "Light Cooperation Plan" and "Kwai Micro Theatre", cooperated with "Midu" for web fiction IP adaptation, and vigorously supported the content production and incubation of micro web series. In April 2021, the total play volume of Kwai's micro web series reached 79.4 billion, and the average daily total viewing time of micro web series exceeded 35 million hours in a single month. The average daily active users of micro web series exceeded 210 million, increasing by 8.0% in six months. At present, Kwai's platform is rich in episode subjects, and its users show the characteristics of high immersion and strong commercialization realization ability.

"Tik Tok" entered the micro web series industry for a short time but caught up quickly. In early 2021, Tik Tok started cooperating with celebrities and professional Film & TV companies to produce self-produced micro web series "1 vs 100 Dreamboys" and "Nanxiang School". As of April 2022, the cumulative plays had reached 100 million and 84.595 million respectively. Subsequently, Tik Tok launched the "New Episodes Project", which cooperates with Tomato Novel to shorten the IP of online literature. Compared to the micro web series of Kwai, which win by quantity, Tik Tok focuses more on the creation of high-quality episode. They use popular IPs, celebrity effects and large-scale publicity to make hot episodes, focusing on the quality of content, shooting environment, actors' performances, and professional post-production of episodes.

3.2 The Leading Integrated Video Platforms: Increase the Layout and Well-Produced

The leading integrated video platforms, "WeTV", "Youku", "MangoTV", "iQIYI" and "bilibili", occupy 88.3% of the Chinese market share. They have a strong voice and a high concentration of users. Unlike the short video platform to account for the primary purpose of fixed powder diversion, the comprehensive video platform is more inclined to do an excellent job of quality episodes. They plow in the depth of content and production excellence, so the industry layout is complete and there are more masterpieces.

"WeTV" launched the "yoo" video platform for vertical screen content distribution as early as 2018 and released the "Mars Plan" in 2020, which provides incentives, traffic support and popular web fiction IP rights for creators to bid on. In December 2021, the micro web series brand "Ten Minute Theatre" will be divided into different themes, such as comedy, national style and suspense. Moreover, the "Ten Minute Theatre" will be broadcasted in seasons.

"Youku" released the "Youku Micro Web Series Cooperation White Paper" in February 2020, which launched a whole chain of services from promotion and marketing to commercialization and realization for Film & TV companies, production organizations and individual creators. In August 2021, Youku optimized its sharing model and partnered with "Alibaba Pictures", "Shuqi Fiction" and "Kuaikan Comics" to further promote commercialization and attract high-quality content creation teams to join. Now the top 10 episodes in Youku's hot micro web series list are all romance genre episodes, most of which are adaptations and re-creations realized through popular web fiction IPs.

"MangoTV" has launched the "Big Mango Short Play" theater for micro web series, and they also created the "table episodes" section, which fits users' habits, edits the existing high-quality popular web series on the platform, selects the main episodes and famous scenes, and shortens the length of the single episode. In addition, it realizes the interaction and win-win situation between the micro web series and the existing web series of the platform. In addition, MangoTV also opened the "MangoTV Short Play" account on YouTube to lay out the cross-cultural dissemination process of micro web series, and "The Killer is also Romantic" has already gained 320,000 views on the platform.

In addition, "iQIYI" still focuses on mini-series, while "bilibili" has launched a "Light Theater" with suspense and fantasy micro web series to increase its industrial layout. Both platforms have experience producing and

broadcasting high-scoring mini-series, so they have specific development potential and competitive advantages in producing micro web series.

3.3 Other New Media Platforms: Based on Characteristics and Layout on Demand

In addition to short and integrated video platforms, other types of new media platforms have also ventured into the micro web series market one after another. Weibo has cooperated with short video platforms such as Kwai. Through the platform's existing user traffic base and big data algorithm recommendation technology, Weibo pushes infomercials of micro web series to potential users, bringing traffic gains to the video platform and achieving a win-win situation for both platforms. Zhihu, on the other hand, combined the platform's user preferences to create micro web series on science fiction and suspense themes.

4. The Development Dilemma of the Chinese Micro Web Series

In the case of the video platforms that have launched the micro web series industry layout, the production of micro web series began to face the difficulties of low access threshold for creators, uneven quality of episodes, and serious homogenization of the subject matter and content. Meanwhile, the commercial realization system within the platforms and the marketing promotion model outside the platforms also need to be improved urgently.

4.1 The Quality of the Content Is Uneven and Can't Meet the Aesthetic Needs of Users

The presentation of the micro web series is currently limited to vertical screens. Due to the limitations of vertical screen shooting scenes and episode length, the micro web series' narrative techniques and camera language are relatively homogeneous. In order to attract users' attention, micro web series creators must frequently add plot reversals in short and fast-paced episodes, making the creation of micro web series more difficult. Some micro web series are characterized by fast food, and some famous and high-quality original plots are copied and imitated by other creators, limiting the diversified and innovative development of micro web series content. What's worse, the low access threshold also makes the quality of episodes uneven. The micro web series produced by UGC spontaneously show labeled characters, routine plots, homogeneous content and rough production. Without the support of content depth, this kind of micro web series can only bring an instant entertainment experience for users and cannot meet the aesthetic pursuit of the public.

Therefore, the micro web series industry urgently needs creators and professional production teams with independent thinking and personalized expression, those who can convey the deep values behind the narrative with beautiful camera language, trigger users' empathy and reflection, and bring meaningful and valuable TV series viewing experience.

4.2 The Urgent Need for Policies to Constrain Potential Risk Factors

The eye-catching economy has given birth to a group of fanatics only interested in "hotness". They plagiarize, erase, and set up eye-catching plots to attract traffic. Some romance episodes are full of forced, objectified women, violence and soft pornography, which affects the overall appearance of the micro web series. There is still a lack of a standardized quality assessment system for micro web series within the industry and corresponding legal restrictions on the creative compliance of episode producers. Therefore, there are a lot of significant risks in terms of copyright and values.

4.3 The Conversion Effect of the Paid Model Is Poor and the Revenue Source Is Still Mainly Split

At present, the business model of the micro web series industry includes platform sharing, advertising, episode customizing and pay-per-view, of which platform sharing is the primary source of revenue for most micro web series. The pay-per-view model is still not mature. In 2021, Kwai launched the internal test of the pay-per-view function of the micro web series. Some popular episodes have suffered a significant drop in the number of VODs since the start of pay-per-view because of their low-cost performance. Meanwhile, Quibi, which relied on paid subscriptions for most of its revenue, also suffered significant losses due to the difference between the actual number of subscribers and expectations and was eventually delisted.

4.4 The Marketing Dissonance of Micro Web Series and the Over-Marketing of Advertising Implantation

Micro web series are not well promoted in the communication channels other than short video platforms, and the marketing method is relatively single. Therefore, the development of the derivatives market is not perfect. With the popularity of micro web series, many brands began to follow the trend of investing in advertising implantation blindly. Due to the incompatibility between brand characteristics and the types of episodes, blind advertising implantation will cause frequent scene skipping, cut the user's viewing experience and cause users to resent.

5. The Development Strategies of the Chinese Micro Web Series

5.1 Improve Quality and Efficiency: Joint Development and Theater-Based Operation to Build High-Quality Episodes

The branding of micro web series is crucial. At present, "Kwai Little Theater", bilibili "Light Theater" and WeTV "Ten Minute Theater" have explored new directions for theater operation of micro web series, and this kind of branded theater operation mode can ensure the quality of episodes and promote the production of high-quality original micro web series.

In order to boost the scale production of micro web series, the leading companies of each industry should strengthen joint development, with IP rights provided by web fiction platforms, quality actors delivered by MCN agencies and micro web series platforms, and professional production by Film & TV companies. In content production, producers should expand the depth of episodes through deep plowing of vertical categories and make technical innovations in filming techniques to create a high-quality visual presentation model.

In addition, video platforms can also classify and rate micro web series based on their episode reserves. To meet the diversified selection needs of users, they can promote S-grade and A-grade micro web series of the same subject matter in a single-season theater, and put B-grade micro web series of other subjects at the bottom of the selected channel page, which can reduce competitive pressure among episodes of the same subject matter and achieve sustainable development.

5.2 Policy Protection: Raising the Threshold of Access and Producing Compliant Micro Web Series

In order to standardize the micro web series industry, the government and relevant regulatory departments should promptly establish industry standards, raise entry thresholds, and screen high-quality content creators for entry. By carrying out relevant support programs, the government can provide valuable leadership for the content planning of episodes and effectively improve the episodes' quality.

At the same time, They can actively introduce relevant policies to regulate the production process, strengthen content supervision, establish distribution order, implement comprehensive governance, set up a classification rating system for episodes, and provide a suitable environment for the development of micro web series through the improvement of regulatory policies and rating system.

5.3 Upgrading of Realization: Improving the Platform Sharing System and Short Drama Payment Model

In order to achieve paid transformation for micro web series, on the one hand, the platform needs to improve the sharing system and give creators more financial support for traffic. By building an IP copyright pool of web fiction, the benefits of copyright, production and promotion can be shared by three parties.

On the other hand, it is necessary to improve the quality and artistic value of episodes and enhance user attractiveness. They can analyze user preferences through big data and explore profit models based on matching quality with price. Meanwhile, they can cultivate user payment habits through big finale pay-per-view and find new paths for pay-per-view transformation.

5.4 Professional Production: Enhance Artistic Value and Focus on Realistic Narrative

In order to meet the aesthetic pursuit of users, the creative team should always pay attention to users' needs. They should adopt the synchronization mode of editing and broadcasting, and adjust or improve the subsequent plot design according to users' feedback. At the same time, they should increase cooperation with IP copyright holders to improve the quality of content. Furthermore, they can also realize high-quality visual presentation through professional filming scenes, equipment and production teams to meet users' aesthetic needs and enhance the artistic value of the episodes. Through digital technology, we promote the professionalization of micro web series filming, bring users a sense of immersion and "presence", and arouse their emotional resonance.

5.5 Linkage Marketing: Implementing the Cross-Platform Interactive Communication and Optimizing the Advertising Implantation Specifications

The micro web series platforms can realize cross-platform interactive communication through cooperation with social media platforms such as Weibo and "RED". They can open up the promotion and marketing channels outside the platform by placing infomercials. In contrast, the episode CP interacts and carries out offline derivative activities to form a close connection with fans can enhance the popularity of actors and episodes, thus achieving a win-win situation in both directions.

In addition, the platform can provide customized services for advertisers and screen out content creators who match the needs of the product. By optimizing the advertisement placement specification, the advertisement can serve the plot and realize the commercial conversion without affecting the users' experience of watching the episodes.

6. Conclusion

With the popularization of 5G technology, micro web series, which feature short videos and web series, will undoubtedly occupy a more important position in the mobile video field. With the popularity of smart mobile terminals and VR & AR technologies, the re-innovation of communication technology will also promote changes in the media consumption habits of mobile users, thus giving rise to a new model of the performance of micro web series and creating a more convenient and interactive immersive audio-visual experience for users.

Because research on micro web series is still in its infancy in China and abroad, and most studies are specialized case studies, there are few existing papers to refer to and analyze for this paper, and there are many gaps in the research. At the same time, this study is primarily based on a macro perspective, but on a micro level, it only focuses on the perspectives of users and creators and lacks the perspective of interviews with industry insiders, so the final development strategy provided is still incomplete and imperfect.

From the perspective of the entire network audio-visual industry, the birth of micro web series has provided new ideas and directions for developing the network audio-visual industry. The future development of the network micro-drama industry still faces many challenges: how to better develop and theatrically operate the micro-drama brand by video platforms, copyright holders and film companies; how to optimize the cash model according to user needs and provide users with high-quality episodes with both depth and breadth of content to enhance artistic value; and how to find a balance between multi-platform linkage and standardization of advertising implantation to create a closed-loop of short drama content ecology and realize the extension of industry chain value will be the topics that people need to focus on forever.

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