

Export Trade of China's Film Industry in the Context of Global Value Chain: Positioning and Development Path*

Zongmin Liu
Pittsburgh Institute
Sichuan University
Chengdu, China

Luhao Liu
School of International Trade and Economics
Shandong University of Finance and Economics
Ji'nan, China

Xinzhuo Liu
School of International Trade and Economics
Shandong University of Finance and Economics
Ji'nan, China

Abstract—The export trade of film industry has become a crucial part of international trade competition nowadays. This paper first discusses the problems of Chinese film industry and film export trade on this basis, and finds that the export trade of Chinese film is facing great difficulties in the scale and operation of the industry, the creativity and production of the film content, and the management and support of the government policy, so as to make a positioning for Chinese film trade in the Context of global value chain. Finally, based on the four aspects of film content, operation mode, cultural foundation and policy environment, this paper puts forward the way to promote the rapid development of Chinese film industry and export trade.

Keywords—*global value chain; film industry; positioning; development path*

I. INTRODUCTION

The film industry, as a key part of the cultural industry, can best reflect China's national culture and value orientation. The development of film industry helps to enrich people's spiritual life, promote the Renaissance and cultural prosperity, and also drive the development of related industries (Sidian Luo, and Aihua Zhang, 2012). The export trade of the film industry has become a critical part in the competition of international trade. It can not only gain rich profits, improve the structure of foreign trade, but also output a country's values and culture, which plays a vital role in the shaping of the Chinese international image and the construction of a cultural power (Shuguang Rao, 2012).

In recent years, Chinese film industry has developed

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rapidly, and the domestic film market is booming. As of 2017, there were 474 films in 6439 theaters nationwide, including 376 domestic films and 98 imported films, with a total box office income of 55.9 billion yuan (State Administration of Press Publication, Radio, Film and Television of The People's Republic of China, 2017). However, it is undeniable that it is still the imported films that make a great contribution to the domestic film market. In 2017, the number of imported films accounted for only 1/4 of the number of domestic films, but contributed 46% of the total box office income of the year, reaching 25.714 billion yuan. Comparatively speaking, the domestic films are very weak in foreign markets. The total overseas box office income of domestic films in 2017 was only 4.2 billion yuan. Whether from the export quantity of films or box office performance, the overseas expansion rate of domestic films is slow.

Obviously, in the film industry, there is a clear gap between China and the developed countries such as the America, which is not commensurate with China's willingness to build a powerful cultural country. At present, the export of Chinese film products is still in the initial stage, with relatively backward film making and marketing, poor film content and quality, and small scale of film trade export (Yuanping Duan and Xinxin Wang, 2015). In this case, it is of great practical significance to explore the current situation of Chinese film export trade, to clarify its positioning on the global value chain, and to put forward a reasonable development model and suggestion for the expansion of the export trade of the Chinese film industry, the enhancement of overseas output ability of traditional culture and values in China, and the shaping of a new Chinese international image.

This article is divided into four parts from the structure. The first part combs the current situation of Chinese film industry and film export trade in detail. The second part explores the problems in the export trade of Chinese film

industry, and makes a positioning for the Chinese film industry from the perspective of global value chain. The third part builds a film industry development path rooted in the excellent culture with Chinese characteristics. The fourth part summarizes the content of the full text.

II. THE PROBLEM AND ORIENTATION OF CHINESE FILM INDUSTRY EXPORT TRADE

A. *The Problems of Chinese Film Trade*

1) *Film industry*

a) *Low concentration of industry*

Throughout the developed countries in the film industry such as Europe and America, the industrial concentration of film industry is generally high. The centralization of the industry can effectively gather the various elements needed for film manufacturing, which is conducive to the extension of its business, so as to attract talents and raise funds, save costs and achieve economies of scale (Xiaolin Dong and Shan Wu, 2011). At present, most China film companies are small in scale and extensive in operation. From the perspective of industrial scale, Chinese film industry has not yet formed its own industrial scale. On the one hand, the position of the state-owned film production companies, such as China Film Group Corporation, Shanghai Film Group and Changchun Film Group, is gradually decreasing, and the market share continues to decline. On the other hand, although the emerging private capital has injected new forces into the Chinese film market every year, such as Xiaomi and Ali, there is a general problem of small size and weak strength. In general, in term of the comprehensive strength, there is no production company that can compete with any of the six major production companies in America (Paramount Pictures, Inc; 20th Century Fox Film Corporation; Universal Picture; Warner Bros. Entertainment, Inc; The Walt Disney Company; Sony Pictures Entertainment). In addition, there are also some problems in the film industry, such as the repeated investment and repeated construction, resulting in waste of resources and impeding the improvement of the overall level of the industry. The products are inferior in quality, lack of market competitiveness and market competition consciousness. They only pay attention to the immediate interests, and cannot take a broad view of the world and expand the international market.

b) *The imperfection of the international marketing system*

A sound international marketing system is a magic weapon for the developed countries in the film industry. The international marketing consciousness of Chinese film enterprises is weak, the marketing method is single and backward and the marketing system is incomplete. They focus on the domestic country and ignore foreign countries, unable to attract the attention of foreign audiences, and cannot make local audiences resonate in values and attitudes towards life. At present, there are three main ways to export films in China: The first one is to hold a film trade fair, which is similar to the Canton Fair for goods trade in China, such as the film trade fair in China and South Korea. The

second one is to participate in international film festivals, such as Cannes, Venice, Berlin and Pusan International Film Festivals, so as to enhance the popularity of domestic films. The third one is the Chinese and foreign co-operation work, such as the "Resident Evil 5" made by China and America in 2012, "The Thieves" made by China and South Korea in 2012, and the "Cloud Atlas" and "Iron Man 3" made in China and America. Admittedly, the three channels have promoted the overseas marketing of Chinese films to varying degrees, however, the cost of holding a film fair is too high and the effect is very slight. The number of domestic films in the International Film Festival is relatively small and the content is not creative, therefore, the number of winners is limited. Although the co-productions are conducive to the use of foreign local marketing channels for publicity, and increase the exposure rate of Chinese actors to a certain extent, China is difficult to contact the core part of film production and operation, and can only play an auxiliary role.

c) *Lack of funds and financing difficulties*

As we all know, films belong to high-risk industries. Only when financial capital is guaranteed by a sound and perfect investment and financing system, will people have the courage to enter the film industry. In the film capital market, as the hegemony of the world's film industry, the America has the most sound investment and financing service system—completion guarantee system. This system not only fully mobilized banks and venture capital institutions, but also succeeded in attracting individual investors to join, which became an important guarantee for the normal operation and prosperity of the film industry in America (Kong, 2005). Not only that, the insurance system penetrates every part of the American film industry. From actor to property, from the opening to the issue, every link has the participation of commercial insurance, which solves the worries about the financial capital investment. Chinese film trade starts late and its investment and financing system is imperfect. In the investment funds of Chinese film industry, the own funds account for more than 90%, the government funds account for 7%, while only 2% come from social capital. Due to the lack of the system and the professional institutions, the state support fund, financial capital and private capital lack correct guidance, and meet great obstacles when entering the film industry (Pan Liu and Xingxing Pan, 2014). At the same time, because of the unsound insurance system, the films with a loss of investment are not in the minority, and the investors' enthusiasm and confidence have been dealt a blow.

B. *Film content*

a) *Content lacks new ideas*

Innovation is a key component of the export competitiveness of film products. If the content of the film remains unchanged and lacks originality, it will be eliminated by the fierce international competition and diverse audiences. In recent years, many Chinese film products have not been based on reality, the filming technique is too single, and the manifestation lacks of aesthetic value and artistic value, resulting in low quality of the content of film products. Several decades ago, Chinese

action films, with their fierce fighting scenes and thrilling plots, won the love of foreign audiences. Since then, Chinese Kungfu films have become the main play of Chinese film exports. Dull content and monotonous themes make Chinese film products difficult to export. If Chinese films want to win the favor of the overseas audiences, it is necessary to realize that the impact of the picture alone is not enough. It is necessary to innovate from the content and to pursue the shock of the heart. At present, there are homogeneity, imitation and other common problems in the development of Chinese films (Jia Guo, 2013). The most prominent feature is the mass release of films, such as spoof films and comedy films. It is undeniable that, thanks to the majority of the young people in the small town, the comedy films represented by the "Lost in Hong Kong" have been a huge success in China, but it has bombed at the box office abroad, unable to compete with international films of the same kind. In addition, the total quality of Chinese films has been lowered by the emergence of fans films and variety films that are completely for the box office. The film industry is ultimately a creative industry. The theme of films is derived from life and higher than life. If we want to change the current situation of film trade deficit, we must be original in content.

b) Backwardness of production level

Chinese films do not make full use of IP at present. The so-called IP refers to the results of intellectual creation, which can be transformed into the intellectual property of property. In short, for a film, an IP is a good literary creation or script, such as "Journey to the West". There is no shortage of good IP in China, however, there is no development and utilization of the existing IP. To make an IP ultimately successful, great efforts must be made in production, distribution, publicity, screening and related product development. Among them, the production link is the key factor that restricts the transformation of IP into good film works. If Chinese film products want to be invincible in the fierce international competition, they need to keep pace with the times, innovate boldly, and have advanced production technology as a support. The technological level and technical level of domestic film production are quite different from those of Hollywood. Although, in recent years, there has also been the "Monster Hunt" and other excellent special fantasy films made in China, however, compared to "Avatar" and other masterpieces, the production level of China is slightly tender, mainly because of the late development of China's digitalization, the weak basis of information technology and the lack of high-end core technology. In addition, the lack of sophisticated talents in the field of production is also an important reason for the backwardness of production. In order to fundamentally improve the level of production, talent and technology are indispensable.

c) Neglect of cultural differences

In the current film trade, there is a common phenomenon caused by cultural differences: a film may get a high box office and good evaluation at home, but after exporting to foreign countries, the overseas audiences will be very indifferent. Chinese film production has always been on the

way of copying and replicating Hollywood films. Many films put the routines of Hollywood films into Chinese stories, making the film content neither absorb the essence of western culture nor break away from the excellent traditional culture of China, so that it cannot be recognized by the international film. At the same time, there are also some films that are too prominent, such as the "The Assassin". Although it has won numerous awards, its lines are classical Chinese, which are obscure and difficult to understand, and the plot is too vague, so the domestic audiences cannot understand the plot, not to mention the overseas audience. Therefore, they cannot resonate, and the domestic and foreign box office is not satisfactory. Most of the film products exported by China are full of national color. In the early days, this kind of work might be effective, however, when the freshness was over, the problem followed. Not only did foreign audiences suffer from aesthetic fatigue, but the quality of films exported was not good as before. In addition, the foothold of Chinese film production is different from that of the European and American films: European and American films are based on western mainstream culture. Their openness, tolerance and humanism are easy to be accepted by the world market. Chinese film production is mainly to meet the domestic market, and sold overseas on this basis. Therefore, it is very difficult for domestic films to open the overseas market.

2) Government policy

a) Weak support for the "going out" of homemade films

Compared with the strong power of the world film industry, the Chinese government's support for the film industry is still insufficient. The policy of the existing film industry has the macroscopic view, but it is relatively broad. Facing the increasing film trade deficit, at present the country does not have effective and specific policy arrangements to support the domestic films "going out", and even the relevant policies are later than the animation and TV play industry. For example, the Film Bureau of the State Administration of Radio, Film and Television began implementing the "Interim Procedures for the Export Awards of Domestic Films" in 2009. Starting from the end of that year, for the first time, the domestic or co-produced export films that met the criteria were awarded according to box office revenue or contract sales volume. The state not only rarely supports the work of exporting films in a market-oriented way, but also supports domestic films overseas in a single way. Overall, the government's support is not enough, the support mechanism is not perfect, and the support mode needs to be further optimized.

b) There is no resolution of the film rating system

Most of the developed countries of the film industry have abolished the system of censorship and review of films, and set up a film rating system that is in line with the international standards, thus ensuring the development of the film industry with the help of law and system. In contrast, China's policies focus on policy support and financial support, such as capital subsidies and tax preferences. As the fastest growing film market in the world, the categorization

and segmentation of China's film market is bound to be one of the trends in the future. However, at present, a strict censorship system is still in place for Chinese film distribution, which leaves the creator at a loss. They can only swarm to shoot historical themes or subjects that reflect the mainstream values of society, but are deterred from the deep realistic theme works that reflect the dark side of society and humanity, which greatly strangles the enthusiasm of the creator and hinders the diversification and differentiation of the film industry. Without rating system, there is no finely differentiated market and it is difficult to achieve the true prosperity of Chinese films in commerce and art, so it is difficult to realize the internationalization of Chinese films.

c) Paying attention to administrative management and dispise the spontaneous market

Most of the developed countries of the film industry have unofficial industry organizations such as industry associations, which are mainly responsible for policy formulation, revitalization of industry, talent cultivation, educational research and sales promotion at home and abroad, in order to promote the flourishing development of the film industry. It is not only a main body of market economy, but also a self-disciplined organization supervised by all sectors of society. At the same time, its funding comes from the film taxes and film assistance money collected by the government, and it realizes its own market operation through government support. As for China, the development of the film industry is mainly based on the "Film Industry Promotion Law (Draft)", however, it should also comply with the policy guidance of the State Administration of Radio, Film and Television and other administrative departments. Policies are from different departments and are divided. Multiple management and restrictions reduce the degree of freedom of the development of the film industry. The role of non-governmental organizations has not been exploited and played, and the leading role of the market in resource allocation has not been highlighted.

C. The Positioning of Chinese Film Industry Under the Global Value Chain

"Fig. 1" is the value added curve of film trade under the global value chain. The so-called global value chain refers to the range of activities that create value in the whole process of product design, utilization and scrapping on a global scale, including product design, production, marketing, distribution, and support and service to end-users (Smith et al.2002). As shown in the "Fig. 1", for the developed countries of the film industry, in the global value chain of film production, the selection of subject matter of films, the shooting of the external scene, and the production of derivative products are at the low end of the value chain. The film production, marketing and distribution, brand operation, screenings and other value links are in the middle of the value chain. The creativity and script creation of films, as well as the development of related derivatives, are at the high end of the value chain with high added value. Developed countries mainly carry out script creation and derivatives development with high added value and high profits. In contrast, in the Chinese film trade, the creativity and script of films, as well

as the film production, have the same high value added. The production of the film intermediate products is also at the low end of the value chain, however, the value creation ability of the global marketing distribution and the derivative product development of films in the second half of the value chain is very low, which is far from the developed countries. It must be noted that although creativity and production have achieved relatively high added value, the creation of most of the added value is based on the domestic market because of the films' shortcomings and the lack of professional international marketing capabilities. Generally speaking, the location of the added value curve of the film industry trade in developed countries is relatively high, which indicates that the whole film industry chain trade has high added value. The developed countries are located in the high-end position of global film trade. However, the film industry of our country is at the beginning stage, the various links of the film industry chain are not perfect, the level of industrialization, specialization and technology of film production is low, the film trade marketing is weak, the profit mode is single, the development of derivative products is weak, the ability of creating value in core value chain links is low, and the value chain lacks horizontal and vertical expansion capability, so the value added curve of the whole film trade is at the bottom, which indicates that the trade added value of the whole film industry chain is not high, the level is low, and the film trade is located at the low end.

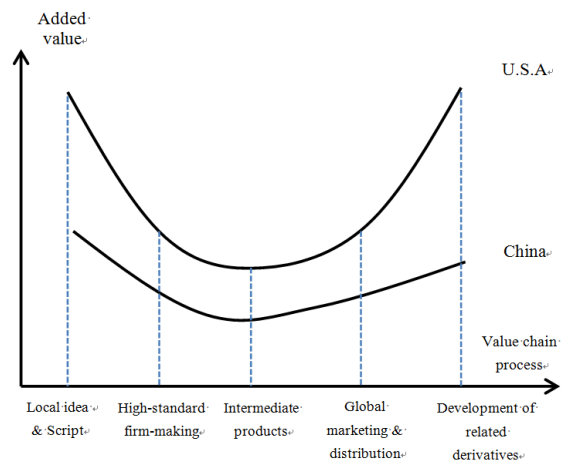


Fig. 1. Film trade added value curve under global value chain.

III. WAYS TO PROMOTE THE DEVELOPMENT OF THE EXPORT TRADE OF CHINESE FILM INDUSTRY

In order to solve the problems of Chinese film industry in the aspects of production, distribution, marketing, derivatives development and film content, change the status of Chinese film industry in the low end of the global value chain of the film and improve the state of the continuous deficit of Chinese film trade, Chinese film industry must upgrade its industry, and develop from the low end of the film industry chain to the high end to go out of a unique development path. As shown in "Fig. 2", the content of the film must match audience's focus and rooted in China's excellent culture. The film industry innovates and upgrades with the operation

mode and industrial technology as the pillar, and the government's policy support provides the external environment for its protection and development.

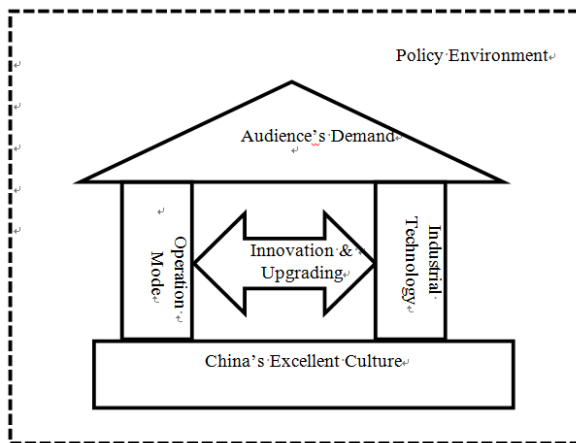


Fig. 2. The path chart of Chinese film trade development.

A. The Content of the Film Comes from the Audience's Demand

Film content is the core factor of the film, and is also a key factor for its popularity. A good film content is derived from the audience's needs and does not need to do a lot of publicity. The content itself is the best publicity. Therefore, if Chinese films want to go abroad and win overseas markets, they must fully understand the needs of overseas audiences. It is necessary for Chinese enterprises to strengthen the communication with other foreign industry peers, to penetrate into the local market, to observe the audience's response to the film, to further analyze the needs and preferences of foreign audiences on the content of the film based on this, and to innovate and reform accordingly. In addition, through the cooperation of government and civil organizations, the "China Film Festival" held overseas is also the main way for Chinese film to communicate with foreign audiences for overseas promotion in recent years. Moreover, in order to make film content conform to the needs of foreign audiences, we need to deal with cultural differences correctly. In order to reduce the cultural differences between the European and American countries and China, we should combine the western culture with the excellent Chinese culture, excavate the common point of human emotion, and use advanced production technology to achieve the best visual effect, so as to realize the double shock of the audience's vision and mind and win the high box office. For other countries in Asia similar to Chinese culture and history, we should focus on local characteristics and increase the volume of culture trade.

B. Rooted in China's Excellent Culture, Boldly Carrying out Film Innovation

Film innovation is another important factor in changing China's film trade deficit. There is no doubt that the most profitable film type in China's film industry is comedy at present. The market is dominated by comedies, and many

people turn to shoot the comedy. However, it is undeniable that the quality of the present comedy in China is uneven. Some comedy plots are vulgar and superficial. They blindly follow the network, only focus on the box office, lose the aesthetic and artistic value, and even abandon the excellent traditional culture of China. Therefore, there is no market at all abroad. Not only that, China, known for its Kungfu films, has few such masterpieces in the last two years. The type of export film is single and the overall quality is not high, which is also one of the reasons for the recent expansion of the trade deficit of the film industry. Therefore, we should brook no delay in innovating movie content and theme. China is now in urgent need of the existence of new films like the "Three Body", which are rooted in Chinese excellent culture and break the thinking pattern of film creation, to stimulate the enthusiasm of the literary creators and the vitality of the film workers. At the same time, the state should also take incentive measures to provide impetus for film innovation and continuously inject vitality into Chinese films. Film innovation includes not only content but also film production and shooting. At present, China urgently needs filmmakers with professional skills, great boldness of vision, great feelings and innovative consciousness to develop and flourish our film industry. Only by making film creation on the basis of national culture and grasping the common feelings of human beings can we fundamentally change the backwardness of the film industry in China and reverse the trade deficit of the film.

C. Promoting the Innovation and Upgrading of Film Industry's Operation Mode

At present, the Chinese film industry has not yet formed its own industrial scale advantages, and there are still many problems in the industry operation, and the industrial technology is still behind the developed countries. The innovation and upgrading of industrial technology and the innovation and upgrading and innovation of industrial operation mode should be integrated with each other. Firstly, we should reform the industrial system of the film industry. We should merge a large number of film production enterprises with a small scale to form a large enterprise with large scale and benefit, and then make full use of various resources and save the cost to form a big brand with international influence, so as to open the overseas market. Secondly, we should actively improve the film capital market, further improve the quality and technical content of the film capital in China, promote the transformation and upgrading of the film industry, accelerate the completion of the vertical integration and horizontal extension of the film industry chain, expand the scale of the film industry and realize the scale economy of the film industry. Thirdly, we should increase the research and development investment, strengthen the training of professional talents, make full use of international resources, not only introduce advanced foreign technology and talent, but also go out to learn advanced foreign experience, improve industrial technology, and then improve the film production level to form a competitive film production industry. Fourthly, we should enhance the overseas marketing capabilities, establish a sound distribution network, and constantly develop new

strategies for Chinese films to enter the international market and open up new channels. For example, in the past two years, Wanda Group has acquired the second largest cinema line in the United States AMC and American Legendary Entertainment Company, used their existing distribution network to increase the export of domestic film products, and made full use of international resources to facilitate the marketing of Chinese films abroad. Fifthly, we should innovate the way of propaganda and marketing. We should subdivide the market on the basis of accurate market survey, carry out strategic promotion according to the films types and the box office situation of different types of Chinese films in foreign countries, and meanwhile, improve the existing ways of promoting films through the International Film Festival and film fair, and combine the publicity and promotion of the film with the Internet and high technology, so as to increase the breadth and depth of the promotion.

D. Strengthening the Government's Policy Support to the Film Industry Trade

On the one hand, the government should strengthen the formulation of special policies, effectively manage the introduction of foreign films, and protect the national film industry. At present, the international common practice is: The first is to limit the amount of trade in film services—stipulating the proportion of domestic films in total hours of projection or limiting the proportion of foreign films in total time of projection. The second is the licensing management of imported film products, so as to regulate the type and structure of imported film products. The third is to stabilize the different taxes in the domestic market—levying higher taxes on foreign film works, or stipulating that the taxes and dues of film products vary with country or region. On the other hand, the government should increase its policy support for the export of its own films and make roads for its own film industry well. The scientific way should be: First, the state should increase the export subsidies, tax rebates and incentives for domestic enterprises that have successfully exported films in the film export trade, encourage enterprises to export films in a market-oriented way and cultivate the overseas distribution and marketing ability of enterprises overseas. Second, the state should set up a special fund to provide financing services for film activities and improvement of film infrastructure, and give priority to financial services for overseas promotion of domestic films in order to solve the problem of financing difficulties in the film industry. Third, the government and non-governmental organizations should work together to promote the promotion of domestic films overseas. China currently owns overseas promotion companies of Chinese films for the development of overseas market. The government should strengthen its cooperation with the company, give the company more support in negotiating exchanges with foreign governments, and strive for greater interests for Chinese films abroad. It should be noted that both the restrictions on the import of foreign films and the support policies for the export of domestic films should be in line with international practice to avoid unnecessary trade frictions.

IV. CONCLUSION

Based on the analysis of the problems existing in the trade of Chinese film industry, this paper makes a positioning of the Chinese film trade in the global value chain, and provides a corresponding development path to solve the problem according to the current situation of Chinese film trade. However, due to the limitation of resources and experience, this paper may be relatively rough on the positioning of China's film industry trade, and may not be comprehensive in the way of providing the development path. In the follow-up study, on the one hand, we need to continue to explore the precise positioning of the film trade and improve the path, on the other hand, we should deeply discuss the production of film derivatives with high value-added. I believe that with the support of government policy, the change of the industry system, under the constant innovation of the content of the film and with the help of more and more talents from the film industry, Chinese film will be more and more recognized by the world, and go out of its own road with both national characteristics and international trends.

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