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A Brief Analysis of the Current State of Chinese Musicals: Based on an Analysis of the Collaborative Networks Among Chinese Musical Producers

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Abstract: After over four decades, China's musical theater industry has seen rising original productions and market enthusiasm, yet still faces structural pressures, notably the lack of an efficient producer collaborative network. Using data crawled from platforms like Rednote, this study applies social network analysis (SNA) with Ucinet to examine overall network traits and key nodes. It reviews producer types, development status, and network evolution.Traditional leaders such as Beijing Poly Theatre Management Co., Ltd. still dominate the market, and emerging players such as Yahua Lake Cinema Line, MSK, Damai | Mailive, and China Oriental Performing Arts Group are on the rise. The collaboration is becoming more diverse and cross-regional. However the network is still loosely connected, unstable and poorly supported with talent. The paper proposes to enhance the capacity of producers, optimise the content and theatre operations, establish a hierarchical talent system, improve market positioning, and improve policies to improve the ecosystem and enhance the quality and influence of original production.

Keywords: Chinese Musicals; Producers; Collaborative Networks; Social Network Analysis

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1. Introduction

As a stage art rooted in drama, with music as its soul and dance as a key means, the musical originated in the late 19th-century Europe and US and spread globally due to its accessibility and commercial appeal[1]. The US and UK developed mature market-oriented systems via a "producer-centered" model and specialized division of labor[2]; Germany and Japan combined nonprofit theaters with commercial operations to reduce uncertainty[3]. These show musical theater relies on industrial collaboration.

China's localization began in the early 1980s. Over 40 years, over 300 original Chinese musicals have been staged[4]. Since the 21st century, original productions have grown but with weak market performance[5]. Recently, driven by variety shows and new formats, the market has grown. The 2025 annual report shows 19,700 performances (up 15.04%), box office of 1.807 billion yuan (up 7.55%), and attendance of 8.1859 million. Original productions accounted for 88.3%. Yet the industry faces "surface prosperity, but underlying pressure"[6]. A key bottleneck is the lack of coordination among industry chain links. Producers, including production companies, investment institutions and theatre operators, are the key node linking creation, capital and market. However, China's industry is hampered by "fragmented" collaboration: design, production, promotion

are disconnected, lacking stable partnerships[7]; most productions are funded by government grants or project funding, with decisions guided by expert opinion rather than market demand; there is a shortage of talent with high turnover[8]. This under-developed network makes scaling and professionalisation difficult. The essence of the problem is that the collective networks of producers have not been brought to the ideal. In exploring this, it can bring out structural barriers and provide references for an industrialised path suitable for China.

This paper focuses on the collaborative networks of Chinese musical theater producers. It identifies what is trending, classifies the type of producers and observes the state of development. Using social network analysis, it investigates the collaboration patterns and structural features of the network. Finally, it proposes recommendations for promoting coordinated development to improve the industrial ecosystem, production quality and market influence, and provide references for cultural market diversification.

2. Research Methodology

2.1 Idea of Model

A modelling strategy is the general structure and logic of building and using models in the course of a research project. It discusses essential points such the model's aims, how it was developed, data it uses, assumptions, validation techniques, and how the model is resolving the research questions. The modelling approach is an integral part of the research design of a thesis, which sets the path of the study, the methodologies used and the validity of the results. The aim is to create a model to measure the collaborative ties between musical theatre producers and to explore the peculiarities of their network.

Models such as social network analysis and co-occurrence matrix models can be selected for the study of the collaboration network of Chinese musical theatre producers. The system is trained on the data from musical theatre producers' collaboration. The processing phase is to generate the co-occurrence matrix. The output is the co-occurrence matrix and the analysis findings of the matrix. The data are gathered from official sources, and information on works with no collaborations documented and duplicate collaboration records are eliminated to assure data accuracy and completeness. The data of the cooperation is transformed into a format of a co-occurrence matrix. The findings of the output of the model are deeply analysed. The collaborative network structure of musical theatre producers is analysed through the co-occurrence matrix and metrics like node degree and centrality are calculated. The model findings are used to make research conclusions and explain implications for practical difficulties, including an analysis of which producers occupy important positions in the collaborative network and the influence of this cooperation model on the musical theatre industry.

2.2 Methods and Instruments

Social Network Analysis (SNA) is a technique for investigating the structural links between social entities, for example countries and organisations. Born in the subject of sociology in the 1930's, it steadily spread from sociology to other disciplines in the 1970's and 1980's, becoming a research paradigm through the interdisciplinary integration of anthropology, psychology, sociology, mathematics, and statistics. At the heart of this approach is the quantitative examination of interactions between social actors, via graphical and mathematical methods, to expose the structural qualities underlying these relationships[9].

Analytically, social networks are made up of two basic components: "nodes" and "ties." The basic idea is to represent social entities as nodes in a network and links between social entities as edges in the network, so that by analysing the structure of the network we can understand the pattern, dynamics and effects of social relationships. Changes in the structural qualities of persons are explored by use of metrics that include degree centrality, point strength and betweenness centrality. The most often used approach is centrality analysis, which measures an actor's power position in a network from three perspectives: degree centrality, betweenness centrality, and proximity centrality[10]. Degree centrality is the number of direct ties to other actors and is an indicator of local influence, betweenness centrality is the extent to which an actor controls the flow of resources, and closeness centrality is the independence of an actor from the control of others[11].

Regarding tools, there are a range of mature software applications that assist social network analysis. The three most generally used tools are Ucinet, Pajek and NetMiner. Ucinet is very complete and computationally powerful, appropriate for processing medium to large scale datasets with many connections. The development of these technologies has substantially

facilitated the use of social network analysis in numerous domains.

2.3 Data Source

The data of musical theatre production firms used in this study were derived from the Chinese Musical Theatre Performance Information Network, which is now the most complete and largest information platform for musical theatre in China. This website is intended to aid musical theatre fans and audiences by gathering information on musical theatre performances throughout the country to make it easier for viewers to organize their theater-going calendars. The key elements include show descriptions, performance schedules, venues, cast schedules and theatre profiles. For the author's research on Chinese musical theatre producers, a total of 365 Chinese musicals from 1997 to 2024 were documented. After removing 16 entries without producer information, a total of 349 records of Chinese musical theatre producers are retrieved and a network of cooperation among musical theatre producers in China is established.

3. Visualization of Trending Topics Related to "Chinese Musicals"

3.1 Assists

Social media platforms are become crucial places for information sharing and cultural interaction. Rednote is a prominent social sharing website in China, where a large volume of material created by users (UGC) about hot subjects in many cultural disciplines is collected.

In this study, the researcher searched the phrase "Chinese musicals" on Rednote. The Octopus crawler was used to capture a significant number of relevant trending post titles and particular content, which established the basis for later analysis. Data collection was finished and the text data were analysed in depth using Nvivo software. In an effort to make the research results more comprehensible, our study further employed the Weiciyun tool to draw a word cloud as shown in Figure 1.

Figure 1: Word cloud of recent hot topics related to "Chinese musicals"



As seen in the word cloud, words like "musical," "China," "actor," "theater," "auditorium," "audience," "stage," "performance," "SD," and "character" appeared frequently, demonstrating that user interactions were mostly centred on the musicals themselves, the actors, character interpretations, performance locations, and audience experiences and opinions. The Orphan of Zhao, Fan Letter, Smash The Wall, The Long Night, Blade&Blossom and other works have been widely discussed and popular with audiences. Actors like "Zheng Qiyuan," "Xu Junshuo," "Ayunga" and "Zheng Yunlong" were often referenced, indicating their leading position and strong popularity in the conversation. The producers "JuHuo Music", "Shanghai Media Group"," "Poly" also attracted a lot of attention. The terms "original", "production", "quality", "script", "music", "lyrics", "premiere", "tour", etc. are also very prominent, reflecting the overall evaluation and expectations of the audience for the quality, production and current development status of the works.

To summarise, Chinese musical conversations on Rednote address performers, performance activities, audience response, the creative process, and quality control concerns. Users are not only interested in the creative merit of the works, but also in their market performance and societal influence. The frequent reference to well-known performers, prominent productions and production firms shows that charm and professional ability are important in user comments. This information provides a valuable reference for the creation and promotion of Chinese musical productions, enabling production companies to better

understand audience demands, improve production quality, and enhance market competitiveness.

4. Measuring the Structural Features of Typical Collaborative Networks among Chinese Musical Producers

4.1 Degree Centrality

Degree centrality is the number of edges directly connected to a node and is the most basic and intuitive measure of centrality in social network analysis[11]. The higher the degree centrality of a node means the more links it has with other nodes, which shows the node is in a central position in the network and has more "power". Degree centrality is employed here as a measure of the activity level and direct influence of different musical theatre producers within the collaboration network. Figure 2. Top 20 companies and organisations ranked by degree centrality in China's musical theatre producer collaboration network.

Figure 2: Degree centrality of the top 20 production companies in the Chinese musical production collaboration network

Rank	Producer	Degree Centrality
1	Yahua Lake Cinema Line	70.000
2	Beijing Poly Theatre Management Co., Ltd.	28.000
3	Damai | Mailive	19.000
4	MSK	16.000
5	China Oriental Performing Arts Group	12.000
6	Shanghai Juhuo Music Culture Co., Ltd.	12.000
7	Shanghai Shangxi Culture Communication Co., Ltd.	11.000
8	One Good Show Culture Media Co., Ltd.	10.000
9	Shanghai Media Group (SMG) LIVE	10.000
10	MOriginal	9.000
11	Sifan Fansi	9.000
12	Shanghai Tribute Culture Communication Co., Ltd.	9.000
13	Jucheng Musical	9.000
14	Dongcheng Sub-district Office, Dongguan City	9.000
15	Shanghai Xingzai Culture Communication Co., Ltd.	8.000
16	Dongguan Municipal Bureau of Culture, Radio, Television, Press and Publication	8.000
17	Publicity Department of the CPC Dongguan Municipal Committee	8.000
18	Shenzhen Jucheng Network Technology Co., Ltd.	8.000
19	Show World · Shanghai Musical Theatre Arts Center	7.000
20	Nanjing Haixiao Culture Communication Co., Ltd.	6.000

Yahua Lake Cinema Line has the highest centrality score of 70.000, indicating that it has the most direct connections within the network of musical production partnerships, possibly due to its extensive partner network and strong resource integration capabilities. Beijing Poly Theatre Management Co., Ltd. (28,000) and Damai | Mailive (19,000) rated second and third respectively, which also reflects their huge immediate impact on the network. MSK and China Oriental Performing Arts Group followed closely with centrality ratings of 16.000 and 12.000 respectively, which means that they have prominent positions within the network. The centrality score was gradually reduced from the 6th to the 20th place, which means that these corporations and organizations had less direct links in the network but still played important roles.

4.2 Closeness Centrality

Closeness centrality is defined as the average distance from a node to all other nodes in the network, i.e., the extent to which a

node is close to the rest of the network. It is calculated as the reciprocal of the sum of the shortest path distances between the node and each of the other nodes[11]. The greater the closeness centrality the shorter the distance between that node and other nodes and the closer to the center of the network. This means that the network information resources can arrive at that node faster and it can connect to other nodes more easily. This also means that the node is able to reach other network members in less steps, thus has more independence and efficiency of information dissemination and resource acquisition[12]. Closeness centrality measures the actor's ability to act without being "controlled" by others. The closer the actor is to the other, the less the actor is dependent on others for information dissemination, and the more the actor can acquire and transmit resources in an autonomous manner[10]. Closeness centrality can be applied to measure the efficiency of information transmission and the ease of resource acquisition among musical theatre producers in the collaborative network. High closeness centrality allows producers to access other producers faster and with less dependence on others, thus gaining access to industry information and collaboration opportunities. Figure 3 illustrates the top 20 production companies and organizations by closeness centrality.

Figure 3: Closeness centrality of the top 20 production companies in the Chinese musical production collaboration network

Rank	Producer	Closeness Centrality
1	Yahua Lake Cinema Line	0.372
2	Damai | Mailive	0.372
3	Beijing Poly Theatre Management Co., Ltd.	0.372
4	Hongyang International	0.372
5	Haohao Youxi	0.372
6	MSK	0.372
7	Shanghai Xujun Culture and Arts Co., Ltd.	0.372
8	Shanghai Culture Square Theatre Management Co., Ltd.	0.372
9	Shanghai Xingzai Culture Communication Co., Ltd.	0.372
10	Hanjin Culture	0.371
11	Changyang Culture	0.371
12	Lemon Film & Television	0.371
13	One Good Show Culture Media Co., Ltd.	0.371
14	MOriginal	0.371
15	Zunxin Culture	0.371
16	Shanghai Tribute Culture Communication Co., Ltd.	0.371
17	Shanghai Juhuo Music Culture Co., Ltd.	0.371
18	Beijing Yitong Legend Film & Television Culture Co., Ltd.	0.371
19	Shanghai Meijing Culture Co., Ltd.	0.371
20	Shanghai Shangxi Culture Communication Co., Ltd.	0.371

Yahua Lake Cinema Line and Damai|Mailive are the closest to all other nodes with an average path length of 0.372, thus they can reach other nodes quickly and efficiently, reflecting their effective information dissemination ability in the network. Beijing Poly Theater Management Co., Ltd., Hongyang International, Hao Hao You Xi and MSK also have a high closeness centrality, indicating their effective connectivity in the network. The closeness centrality is gradually reduced from the 10th to the 20th place, but the value is still about 0.371, which shows that these companies and organizations also have good accessibility and information dissemination efficiency in the network.

4.3 Betweenness Centrality

Freeman established betweenness centrality as a measure of the degree to which an actor is a "mediator" or "intermediary" between other players. The measure is generated by counting the number of times a node lies on the shortest path between any two nodes in a network. The larger the betweenness centrality of a node, the more intermediate functions it plays in the network, the stronger its capacity to regulate the flow of information and the exchange of resources[13]. These nodes have a crucial impact on the transfer of information and, consequently, they affect the overall efficiency of the network. In this study, the betweenness centrality finds important organisations as "bridges" in the cooperation network of musical theatre producers, connecting different producers and achieving the integration of industry resources and collaborative development. Figure 4 shows the betweenness centrality ratings for the top 20 production firms and organisations.

Figure 4: Betweenness centrality of the top 20 production companies in the Chinese musical production collaboration network

Rank	Producer	Betweenness Centrality
1	Yahua Lake Theatre Circuit	11989.553
2	Damai | Mailive	8137.057
3	Beijing Poly Theatre Management Co., Ltd.	7332.414
4	Shanghai Culture Square Theatre Management Co., Ltd.	4516.943
5	China Oriental Performing Arts Group	4203.381
6	MSK	3925.667
7	Hongyang International	3265.252
8	Beijing Xiken Piya International Culture Development Co., Ltd.	2366.000
9	China Performing Arts Circuit Development Co., Ltd.	2233.500
10	Nanjing Haixiao Culture Communication Co., Ltd.	2221.167
11	Shanghai Media Group (SMG) LIVE	1144.000
12	Beijing Mahua FunAge Performing Arts Agency Co., Ltd.	1142.000
13	Shanghai Hehe Culture Communication Co., Ltd.	1017.000
14	One Good Show Culture Media Co., Ltd.	1005.767
15	Beijing Yitong Legend Film & Television Culture Co., Ltd.	855.567
16	Show World · Shanghai Musical Theatre Arts Center	797.300
17	Beijing Performing Arts Group	776.940
18	Lemon Film & Television	773.933
19	Shanghai Juhuo Music Culture Co., Ltd.	764.500
20	Beijing Tianqiao Shengshi Investment Group Co., Ltd.	764.000

The intermediate centrality value of Yahua Lake Cinema Line was the highest at 11,989.553, indicating that it plays a significant intermediary function in the network and may effectively enhance the flow of information and resources. The second and the third were Damai | Mailive and Beijing Poly Theatre Management Co., Ltd., with the intermediate centralities of 8,137.057 and 7,332.414, respectively, which also indicates their key roles of intermediaries in the network. Shanghai Culture Square Theatre Management Co., Ltd. and China Oriental Performing Arts Group were the second and third most significant intermediaries in the network with intermediate centralities of 4,516.943 and 4,203.381, respectively. The intermediate centrality between 6th and 20th rank decays progressively, yet the firms and organizations display varied degrees of intermediary roles in the network, which efficiently adds to the overall efficiency of the network[14].

5. Conclusion and Recommendations

5.1 Concluding Remarks

As the scale and diversity of collaborative networks grow, the development trends of the musical theatre industry in China are becoming increasingly diverse, with more themes and formats. Important companies such as Beijing Poly Theatre Management Co., Ltd. have become the leading forces in the network of musical theatre producers, effectively promoting the standardisation and scale of the industry. Meanwhile, new production companies like Yahua Lake Cinema Line, Shenzhen JuCheng Network Technology Co., Ltd., MSK, Damai | Mailive, and China Oriental Performing Arts Group have gradually taken a foothold in the collaborative network and brought some new vitality and innovation to the industry. The collaborative network has evolved from centralisation to expansion and then to increased complexity, emphasising the continued intensification and expansion of cooperation among Chinese musical theatre producers, which has facilitated the optimal allocation of resources and the coordinated development of the industry. The diversification of collaboration forms and scope and the expansion of cross-regional cooperation show the openness and inclusiveness of China's musical theatre production collaboration network, which is conducive to the diversified development of the industry. The trend of integration between the musical theatre industry and other industries, such as related industries, cultural and creative industries, tourism, and China's excellent traditional culture, is significant, giving new growth opportunities for the development of the industry.

5.2 Recommendations

The Chinaese musical theatre industry needs to change its "going it alone" mode to a mode of "collaboration and mutual benefit". To do this, the core competencies of production companies should be enhanced and a collaborative network covering all links of the process from creation and production to performance and marketing should be established. The international experience shows that Broadway's success is due largely to its highly specialised system of division of labour and collaboration. By contrast, there are stark divisions between state-owned theatre companies and private institutions in China; there are few in-depth collaborations between theatres and performing troupes; and the links between creative and production teams are weak. There are two areas on which efforts should be concentrated to solve this problem.

First, implement a producer-centered system and cultivate professional production teams. As representatives of investors, producers are fully responsible for the creative planning, organizational management, and execution of productions, serving as the central hub connecting investment, creation, performance, and the market. Currently, the Chinese musical theater industry suffers from a severe shortage of true professional producers, with a large number of projects managed by directors, composers, or administrative heads of performing arts groups who take on these roles in addition to their primary duties. A producer training mechanism should be established, and incentive measures such as royalty systems and composite remuneration systems should be implemented to closely link creative output with overall profitability. Second, a three-tiered collaborative network should be established: a vertically integrated network that consolidates upstream and downstream resources around strong production companies to form an integrated "concept, production, performance, derivative development" operational model; a horizontally collaborative network that promotes the establishment of alliance mechanisms among theater circuits in different regions to achieve resource sharing and mutual connectivity in touring networks; and a cross-sector convergence network, which encourages producers to engage in in-depth cooperation with industries such as tourism, hospitality, commercial real estate, and film and television media to expand the industry boundaries and value potential of musicals.

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