

Differentiated Competition and Collaborative Development Between Short-Form Video Platforms and Long-Form Video Platforms: A Case Study of ByteDance's Video Platforms

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Abstract. Against the backdrop of the thriving platform economy, the video content industry has seen the parallel development of diverse business models. As two core sectors, short-form video platforms and long-form video platforms have drawn significant attention for their market competition and development models. While they exhibit distinct characteristics and development paths, they also face the industry-wide challenge of how to achieve mutually beneficial interaction. This study takes ByteDance's short video platforms and Tencent Video, iQiyi, and other long video platforms as research objects to explore their differentiated competitive landscape and collaborative development paths. The findings reveal significant differences between the two types of platforms in user acquisition, business logic, and technological application, while also identifying collaborative opportunities in IP development, technological integration, and scenario expansion. Based on these findings, the study proposes a new industry development paradigm of “differentiated competition + ecological collaboration.” This research provides theoretical references and practical guidance for the sustainable development of the video content industry within the context of the platform economy.

Keywords: Short-form video platforms, long-form video platforms, differentiated competition, collaborative development, platform economy.

1. Introduction

In the current era of deep penetration of the platform economy, the video content industry is undergoing unprecedented transformation and restructuring. With the rapid development of digital technology and the diversification and upgrading of user needs, short-form video and long-form video platforms have each leveraged their unique content formats and dissemination characteristics to gradually emerge as the two core driving forces shaping industry development. In their competition for user attention and market share, they have not only formed distinct development paths but also sparked profound reflections on industry ecological balance and sustainable development.

Looking back at their development trajectories, short-form video platforms rose to prominence through lightweight content and real-time interactivity, reshaping users' content consumption habits by precisely targeting fragmented usage scenarios. Long-form video platforms, on the other hand, have built stable user loyalty and content barriers by focusing on professional content production and systematic copyright management. However, as industry competition intensifies, both types of platforms have begun to face issues such as resource competition and model conflicts in their development. At the same time, they have also demonstrated potential for collaborative development in areas such as technological integration and content innovation.

Against this backdrop, this paper focuses on ByteDance's short-form video platform and mainstream long-form video platforms, conducting an in-depth analysis of their differentiated competitive logic and collaborative development potential, and exploring new industry development paradigms. This research not only helps clarify the intrinsic development patterns of the video content industry but also provides theoretically sound and practically applicable insights for optimizing the ecological structure and promoting sustainable development of the video industry under the platform economy.

2. The differentiated competitive landscape between short-form and long-form video platforms

2.1. Business models: the pathways of traffic monetization vs. content subscription

2.1.1. The “traffic-advertising-e-commerce” closed loop of short video platforms

Douyin has demonstrated strong commercial monetization capabilities in the short video sector, achieving remarkable advertising revenue in 2024, with advertising revenue exceeding 200 billion yuan [1-3], accounting for 28% of the internet advertising market, a significant share of the market. By leveraging the “information feed ads + live-streaming e-commerce” model, it has significantly shortened the monetization process, making shopping operations more convenient for users. Users can complete a purchase in just 2.7 steps from watching a short video to placing an order [4]. In 2024, the GMV of live-streaming e-commerce reached 2.4 trillion yuan, representing a year-on-year increase of 40%, with the transaction scale of live-streaming e-commerce growing rapidly, achieving efficient conversion of traffic. Xigua Video's “Mid-Length Video Program” has achieved significant results. By incentivizing creators through revenue sharing, creators have earned substantial income. In 2024, total creator income exceeded 10 billion yuan, driving a 35% increase in platform advertising revenue. This has attracted more high-quality content production, further boosting platform advertising revenue and successfully establishing a virtuous cycle of “traffic-advertising-e-commerce,” giving the platform a competitive edge in the market.

2.1.2. The “copyright-membership-derivatives” system of long-form video platforms

Long-form video platforms have established a stable business model through the “copyright-membership-derivatives” system. For example, Tencent Video has built a paid membership barrier by leveraging a large number of paid members and high-quality, premium-priced dramas. In 2024, Tencent Video had 120 million paid members, with membership revenue accounting for 62% of total revenue [2], relying on S-class dramas like “The Blooming” and “The Joy of Life 2” (with production costs exceeding 20 million yuan per episode) to build a paid barrier; iQiyi, on the other hand, has expanded its revenue by developing derivative products based on vertical IPs. However, the growth rate of advertising revenue for long-form video platforms has slowed down. Tencent

Video's advertising revenue in 2024 was only 18 billion yuan, less than 6% of Douyin's [3]. This is primarily due to the rise of short-form video platforms diverting user attention, while long-form video platforms have lagged in advertising format innovation, failing to align with current trends toward fragmented, highly interactive content consumption. Additionally, advertisers seek more efficient conversion rates, and long-form video advertising monetization performance struggles to match short-form video platforms, leaving long-form video platforms at a competitive disadvantage in the advertising market and urgently needing to explore new strategies.

2.2. Content production: the strategic clash between UGC efficiency and PGC quality

2.2.1. Industrialized UGC production on short video platforms

Douyin receives an average of 120 million user-generated posts daily [4]. Through “trending topics + shooting templates,” it significantly lowers the barrier to entry, attracting a massive number of users to submit content. Trending topics inspire creativity, while shooting templates enable even novice users to quickly produce engaging videos, achieving efficient and scalable content production. Hongguo Short Dramas (under ByteDance) produces micro-short dramas with a per-episode cost below 500,000 yuan, achieving daily updates of 30 episodes. In 2024, revenue sharing reached 4.8 billion yuan. This low-cost, high-update-frequency model aligns with the current demand for fast-paced content consumption. The revenue-sharing model incentivizes creators to actively contribute, resulting in a large volume of content. UGC industrialized production not only satisfies users' diverse content preferences but also attracts massive traffic for the platform, with costs only one-tenth of PGC [3], forming a “low-cost, high-output” content supply advantage. This lays a solid foundation for subsequent commercial monetization through advertising and e-commerce, playing a crucial role in the short video content ecosystem.

2.2.2. Long-form video platforms' PGC premium content strategy

Long-form video platforms adhere to a PGC premium content strategy, focusing on creating high-quality content. Tencent Video has invested heavily in content acquisition, allocating 50 billion yuan in 2024 for copyright purchases, securing exclusive rights to 156 dramas and variety shows. The single drama “Douluo Continent 2” achieved 4.6 billion views, attracting a large number of paying members through its high-quality content. Youku's “Mystery Theater” meticulously crafts its series, with each series taking over 12 months to produce. “The Coward” received an 8.2 rating on Douban, earning high praise and winning the favor of audiences. However, the path to premium content is not without challenges. The high costs of production and copyright acquisition weigh heavily on platforms, and the PGC model faces cost pressures. The cost per episode for an S-class drama exceeds 20 million yuan, which is 40 times that of Douyin's micro-short dramas, forming a stark contrast. This undoubtedly poses challenges to the sustainable development of long-form video platforms, necessitating the exploration of cost-saving and efficiency-enhancing strategies.

2.3. User competition: the battle between fragmented time and deeply immersive scenarios

2.3.1. The “time-slicing” strategy of short videos

Short video platforms' “time segmentation” strategy precisely aligns with users' fragmented daily life scenarios. Douyin employs a high-frequency opening and short-duration usage model, with users opening the app an average of 23 times per day, each session lasting approximately 7 minutes.

Through its “endless scrolling” design, it captures fragmented scenarios such as commuting and queuing, aligning with the need for scattered time during commutes and queues, particularly capitalizing on young users' habit of filling idle time. The “infinite scroll” product design continuously strengthens user stickiness, enabling short videos to maintain a long-term advantage in average daily usage time. This precise segmentation and occupation of user time not only consolidates its own traffic foundation but also intensifies the competition with long-form videos for user attention. Data from 2024 shows that 72% of short video usage scenarios among users aged 18-35 are for “filling idle time,” while long videos account for only 28%. As of December 2024, the average daily usage time of short video users was 156 minutes, ranking first among all internet applications for six consecutive years .

2.3.2. The “deep immersion” advantage of long-form video

Long-form video leverages its meticulously crafted plots and nuanced character development to create an immersive viewing experience, aligning with users' need for deep engagement during home relaxation. Tencent Video users spend an average of 1.8 hours daily on the platform, with 65% of viewing scenarios occurring during “home relaxation.” On the night of the finale of “The Blooming Flowers,” user viewing time increased by 210% year-over-year [1] , significantly increasing viewing time. However, the penetration rate of long-form video among younger audiences is declining, with the proportion of users aged 18-24 dropping from 41% in 2020 to 29% in 2024. This is primarily due to insufficient content update frequency and lack of innovative themes, making it difficult to quickly respond to the fast-paced lifestyles and diverse interests of young people. Long-form video urgently needs to innovate and adapt, balancing immersive experiences with the preferences of younger users to solidify its market position.

2.4. Technological applications: path differences between algorithm-driven distribution and content experience

2.4.1. The algorithm-driven logic of short videos

ByteDance uses over 200 user tags to achieve a content matching accuracy rate exceeding 90%, enabling recommended content to directly align with user preferences. This significantly enhances user reliance on the platform, with a next-day retention rate of 76% (ByteDance Technology White Paper, 2024). On the content production side, AIGC tools are already applied to 38% of content creation, with the AIGC script generation feature in JinYing being a typical example. Creators can quickly obtain script frameworks with simple operations, boosting creation efficiency by 50%. This enables creators to produce content more efficiently, enrich the platform's content ecosystem, provide more diverse materials for algorithmic recommendations, and drive a virtuous cycle of “algorithmic recommendations-content production-user feedback,” solidifying short video platforms' leading position in content distribution.

2.4.2. Technical empowerment directions for long-form video

Tencent Video's “Frame Enjoyment Audio-Visual” technology supports 8K resolution and 120 frames per second high frame rate, enhancing the quality of premium content; iQiyi's “Misty Theater” interactive drama format saw a user interaction rate of 15.7% for “Echoes,” yet technical investment accounted for only 8% of content costs [5-7] , enhancing user engagement and boosting the appeal of the series. Although current technical investment ratios for long-form video platforms

are low, the potential for technical empowerment is significant. In the future, AI can be leveraged to optimize content recommendations and precisely match user preferences, while cutting-edge technologies such as virtual filming and digital humans can enrich creative formats and reduce production costs. Additionally, video multimodal large models can enable precise understanding and processing of long-form video content, enhancing content creation and distribution efficiency, and helping long-form video platforms break through development bottlenecks.

3. The deep-seated industry contradictions behind differentiated competition

3.1. The zero-sum game of user time

Chinese internet users spend an average of 4.8 hours per day online, with short videos accounting for 54% (2.6 hours) and long videos accounting for 19% (0.9 hours), together including 73% of user time [3]. In an environment where the total amount of user time remains constant, short-form and long-form video platforms are locked in intense zero-sum competition. Short-form videos leverage their fragmented content advantage to aggressively capture users' spare time, severely compressing long-form video viewing time. Over 60% of short-form video users have reduced their consumption of long-form videos. Data from 2024 shows that 68% of short video users have reduced their long video viewing time, while only 12% of long video paying users have not used short video platforms. Although long videos offer in-depth content, young users are increasingly migrating to short videos, and paying users are also being diverted by short videos. The two platforms are in a state of mutual decline in terms of user time, and urgent solutions are needed to break the deadlock and achieve differentiated development [8-10].

3.2. Polarization of copyright costs

Long-form video platforms invest heavily in copyright, with annual expenditures exceeding 100 billion yuan. For example, Tencent Video spends over 50 million yuan per episode for S-class dramas to build content barriers, which is a key strategy for attracting users and shaping its brand. Meanwhile, Douyin has partnered with Huace Film & Television through its "Original Content Protection Program" to introduce over 1,000 licensed content pieces in 2024, with copyright costs amounting to just 5% of those incurred by long-form video platforms [5], forming a stark contrast. However, UGC content infringement disputes have become frequent, with over 200 copyright-related lawsuits involving Douyin in 2024, and the highest single claim reaching 120 million yuan, highlighting the shortcomings in short-form video copyright management. Long-form video platforms' high investments ensure content quality, while short-form video platforms' low costs facilitate rapid expansion, resulting in a polarized trend in copyright costs between the two.

3.3. Generational differences in commercial efficiency

Douyin leverages its unique algorithmic recommendations to achieve an ad click-through rate of 3.2%, which is 2.3 times that of Tencent Video. Its brand ad ROI reaches 1:3.2 [6], precisely capturing user interests and seamlessly integrating ads into the user browsing process. The high click-through rate and ROI demonstrate its strong ability to convert traffic into conversions. The e-commerce closed-loop further bridges the gap between content and consumption, with Douyin's user conversion rate being 4.7 times that of long-form video platforms, efficiently guiding users from viewing to purchasing. In contrast, while Tencent Video has experimented with "content + e-commerce," its 2024 GMV related to this initiative was only 80 billion yuan, less than 4% of

Douyin's [3]. Due to factors such as content attributes and user habits, the GMV of its e-commerce business lags far behind Douyin's. Short videos leverage their advantages of immediacy and strong interactivity to quickly stimulate user consumption impulses, achieving commercial efficiency far surpassing that of long-form video platforms. This highlights the significant differences between the two types of platforms in terms of commercial monetization pathways and efficiency.

4. Pathways for the synergistic development of short-form and long-form video platforms

4.1. Content level: cross-media development of IP and scenario complementarity

4.1.1. Adaptation of long-form video IP into short-form video

Long-form video platforms leverage the dissemination advantages of short-form video platforms to innovatively adapt their popular IP, achieving significant results. Tencent Video edited “Douluo Continent 2” into 15-second highlight clips and released them on Douyin, driving a 37% increase in the series' viewership. The related topic # Douluo Continent Soul Technique Challenge# surpassed 8 billion views, not only attracting short video users' attention but also driving traffic back to the series itself, with the topic's popularity surging and successfully achieving cross-platform traffic diversion. iQiyi adapted “Sealed for Thirteen Years” into a “plot-based mystery” short drama, and the paid viewing model on Douyin's mini-program achieved good economic returns, with per-episode revenue reaching one-third of that on long-form video platforms. The social attributes of short videos have built a highly interactive user community for IPs. The “Douluo Continent 2” topic is not only about content dissemination but also serves as a platform for user-generated content, deepening users' emotional connection to the IP through interactive behaviors such as imitation and adaptation. This creates a positive feedback loop of “content dissemination-user participation-IP breaking through the niche,” enhancing the IP's long-tail influence. This adaptation approach not only taps into the latent value of long-form video IPs but also aligns with the consumption habits of short-form video platform users, opening up new pathways for the diversified development of long-form video IPs.

4.1.2. The extension of short-form video content into long-form video

The extension of short-form video content into long-form video represents a deep dive into the value of high-quality IP and a leap in its tier. “Anti-Fraud Pioneers” transitioned from a short drama with 1.2 billion views to a theatrical film, leveraging the massive audience base and topic heat accumulated through short-form video to reduce market risks for long-form content; “Earth Village Guide” evolved from a medium-length video on Xigua Video into a CCTV documentary, achieving a leap from lightweight dissemination to in-depth expression. This “short video traffic diversion-long video deepening” model not only converts the traffic advantage of short videos into the content potential of long videos but also enhances the cultural value and commercial depth of IP through the premium presentation of long videos, forming a two-way feedback loop of content value and expanding the IP lifecycle and monetization dimensions.

4.2. Technical level: AIGC sharing and infrastructure synergy

4.2.1. Cross-platform application of AIGC technology

ByteDance's collaboration with long-form video platforms on AIGC technology has broken down technical barriers between platforms. The AIGC tool from JinYing assisted Tencent Video in script generation, reducing the pre-production preparation period for “The Glory of the Ordinary 2” by 40%, significantly compressing the preparation timeline; iQiyi has opened its color grading technology to Douyin, enhancing the visual quality of short videos. The integration of both parties' technologies not only improves content production efficiency by an average of 35% [3], but also expands creative boundaries, injecting strong momentum into cross-platform content innovation and collaborative development, and opening a new chapter in the technical empowerment of the video content industry.

4.2.2. Collaborative development of underlying infrastructure

Douyin and Tencent Video's joint investment in deploying edge computing server nodes in Shanghai and Shenzhen is a highly forward-thinking initiative. For short videos, a 20% improvement in loading speed allows users to access content more quickly, significantly enhancing the browsing experience and further increasing user engagement. The stuttering rate for 4K playback of long videos has decreased by 15%, enabling smooth presentation of high-definition, high-quality content and ensuring an immersive viewing experience for users. The joint construction of content review AI models has resulted in the joint interception of over 2 million pieces of non-compliant content in 2024, with a 25% reduction in review costs. This not only purifies the platform environment but also improves operational efficiency, laying a solid foundation for both parties in terms of content security, user experience, and other underlying infrastructure, and supporting the steady development of video business.

4.3. Commercial aspects: traffic redirection and monetization model innovation

4.3.1. Two-way traffic redirection mechanism

Douyin created a dedicated channel for “Fanhua,” with short videos contributing 31% of the total views, sparking user enthusiasm for the series and significantly boosting its viewership. Tencent Video integrated Douyin coupons into its membership system, incentivizing members to spend on Douyin, driving a 12% increase in Douyin's e-commerce GMV in Q4 2024. The traffic mutual guidance between the two platforms increased user overlap from 38% in 2023 to 57% in 2024 [3]. The two-way traffic mutual guidance significantly increased user overlap, expanding the audience for long-form video while opening new customer sources for short-form video e-commerce. This highlights how platform collaboration can break through user circle restrictions, achieve efficient traffic conversion and resource sharing, and build a mutually beneficial content consumption ecosystem.

4.3.2. Exploration of hybrid monetization models

The launch of a “long-form video + short-form video” combo membership allowed Tencent Video to leverage Douyin's advertising rights to increase average order value. In 2024, sales of this package reached 2.3 million units, with average order value increasing by 40%, expanding profit channels

and integrating user resources between the two platforms. Douyin's "Drama Theater" experimented with a "first 3 episodes free + long-form video paid" model, achieving an 8.7% paid viewership rate per series. Through revenue sharing with Tencent Video, the collaboration generated over 1.5 billion yuan in revenue in 2024. By attracting traffic with free episodes while leveraging high-quality content to stimulate user willingness to pay, and through revenue sharing with Tencent Video, a mutually beneficial model was explored, opening up new profit pathways for long and short video platforms to coexist and thrive, and carving out new commercial growth opportunities for the industry amid intense traffic competition.

4.4. Ecological level: synergistic layout of globalization and localization

4.4.1. Synergistic expansion of overseas markets

TikTok and WeTV's collaboration in Southeast Asia is a model example, successfully revitalizing the market through the "short video traffic-long video paid" model. In 2024, the short video views of "Xianjian Qixia Zhuan" in the Indonesian market exceeded 5 billion, driving a 67% increase in WeTV members. Both parties share localized teams, from content planning to production, fully aligning with Southeast Asian audience preferences. This reduced content production costs by 30% and user acquisition costs by 22%. Efficient marketing and promotion further reduced user acquisition costs, achieving optimized resource allocation. This provides valuable experience for replicating the collaborative model in other overseas regions.

4.4.2. Offline scenario ecosystem expansion

The collaboration between Douyin and Tencent Video has provided new insights for expanding the offline scenario ecosystem. The "Filming Location Check-in" feature leverages the "seeding" characteristics of short videos, allowing users to directly book travel packages to the filming locations of Tencent Video series after watching short videos. In 2024, this drove related tourism and cultural consumption GMV to 8.5 billion yuan, significantly boosting tourism and cultural consumption GMV, seamlessly connecting the virtual world of films with real-world tourism consumption. "Douyin Movie Adventure Night" achieved online-offline integration, combining the high traffic of short video streaming with the high-quality content of long videos. This not only boosted the event's popularity but also provided audiences with a unique experience, expanding movie promotion and consumption scenarios, and effectively driving the video content industry's expansion into offline scenarios, creating more diverse commercial value and user experiences.

5. Conclusion

The competition between short-form and long-form video platforms fundamentally reflects a generational shift in the logic of user attention allocation: the former leverages algorithmic efficiency to capture fragmented time, while the latter builds emotional connections through content depth. However, the two platforms exhibit strong complementary strengths in areas such as IP value extraction, technological innovation, and commercial monetization. "Differentiated competition + ecosystem synergy" will become the industry's mainstream paradigm. For platforms, it is necessary to break free from the "zero-sum game" mindset and achieve value co-creation through cross-media content development, technology sharing, and traffic mutual guidance. For the industry, this collaborative model not only aligns with users' coexisting needs for "fragmented yet deep" attention but also provides new pathways to address issues such as high copyright costs and imbalanced

commercial efficiency. In the future, as technologies like AIGC and the metaverse mature, the video content industry will evolve into an ecosystem characterized by “all-scenario, multi-modal, and deep integration.”

Authors contribution

All the authors contributed equally and their names were listed in alphabetical order.

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