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Development Paths for Anime and Manga Publishing in the Digital Age: Post-print

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Abstract

Proceeding from the developmental characteristics of China's animation industry, this paper analyzes the developmental pathways for animation publishing in the digital era through an examination of the constraints hindering the industry's growth. Empirical evidence demonstrates that the development of animation publishing must conform to contemporary requirements, possess originality, and entail increased capital investment.

Full Text

Abstract

This paper analyzes the development pathways for animation publishing in the digital era, starting from the characteristics of China's animation industry and examining its existing constraints. Practice demonstrates that the development of animation publishing must meet the demands of the times, emphasize originality, and increase capital investment.

Keywords: digital era; animation publishing; development pathways

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Introduction

The animation industry represents a new form of cultural innovation industry that relies on creativity and animation culture as its foundation. Through copyright management and diverse platforms including film, television, books, and periodicals, it extends to products such as clothing and toys to achieve economic

benefits, representing both a driver and an influential force in social development. China's animation industry began its gradual development in the 1990s and has since become a key focus of national development. The industry maintains direct connections with other cultural industries and interactive relationships with publishing, film, and television, making it dependent on these sectors for growth. Within the animation industry chain, publishing serves as both the foundational condition and critical dissemination pathway, while the rapid development of animation has significantly propelled the publishing industry forward.

According to data from the State Administration of Press and Publication, by the end of 2017, China's digital industry had exceeded 1.825 billion actual users. That year, digital publishing revenue reached 707.193 billion yuan, with the online gaming sector generating 18.38 billion yuan—a 76.6% increase since 2010, accounting for 34.7% of the digital publishing industry. New media-based sectors including mobile games, mobile animation, and web animation have also experienced remarkable growth [1]. However, compared to Japan, where animation comprises over 80% of the digital publishing market, China's animation publishing sector remains proportionally small. While China's animation industry is large in scale, its quality is comparatively low: high-quality animated films represent only about 1% of total output, whereas Japan's share reaches 40% or higher. Consequently, China must prioritize the development of high-quality animation that reflects Chinese cultural characteristics, achieve multi-dimensional growth, conduct effective resource integration, and actively promote industry advancement [3]. Enhancing the importance of animation within China's publishing sector has become a primary challenge.

1. Current Development Characteristics of China's Animation Industry

Animation industry is a new type of cultural innovation industry that primarily relies on creativity, uses animation culture as its foundation, and employs animation and comics as expressive forms. Through copyright management and dissemination via film, television, books, newspapers, and other channels, it extends to products like clothing and toys to achieve economic benefits. It represents both a driver of social development and an influential cultural industry. China's animation industry began developing gradually in the 1990s and has become one of China's key industries. Animation maintains direct connections with other cultural industries and interactive relationships with publishing, film, and television, making it dependent on these sectors for growth. Within the animation industry chain, publishing serves as the foundational condition and important dissemination pathway, while the rapid development of animation has significantly promoted the publishing industry's growth.

2. Constraints on China' s Animation Industry Development

Comparative analysis reveals significant gaps between China' s animation industry and those of the United States, Japan, and South Korea, with major deficiencies in market environment and operational models that prevent it from forming an independent industrial economy. Comprehensive analysis identifies the following causes:

2.1 Lack of Coordinated Industrial Chain

The primary reason for China' s slow animation industry development is the absence of a coordinated industrial chain. Animation production involves a lengthy process from character creation and content development to market promotion and product distribution. International experience demonstrates that over 80% of animation industry profits derive from book and audio-visual product sales, yet China' s profits rely predominantly on derivatives.

2.2 Imbalance Between Input and Output

China' s animation industry focuses primarily on animation production and television broadcasting, with insufficient investment in related product development and promotion. Enterprises rely mainly on television broadcast revenue for profit, which represents a low proportion of invested capital and often fails to cover costs. This situation slows industrial chain development and creates severe input-output imbalances.

2.3 Insufficient Professional Talent Supply

Since animation education began, debates have persisted regarding talent cultivation objectives. Animation is a highly aesthetic industry requiring visual element development and application. Focusing solely on technical execution while neglecting artistic visual experience produces graduates proficient in software operation but weak in artistic foundation, resulting in poor artistic quality and emotional impact. Conversely, emphasizing art over technology yields strong aesthetics but poor presentation quality that negatively affects audience experience. Official surveys reveal that China' s animation education primarily emphasizes computer 2D/3D software, producing students with strong technical skills but weak hand-drawn animation and creative abilities. The animation industry requires compound talent proficient in both art and technology.

2.4 Lack of Creativity in Animation Industry

Recent survey data reveals that among teenagers' 20 favorite animation characters, 19 originate from foreign animation, with only China' s "Sun Wukong" making the list. Despite China' s rich historical traditions and abundant cultural resources, few have been utilized in animation production, leading to two

extreme tendencies: either excessively emphasizing educational functions while neglecting storytelling and entertainment value, or simply imitating American, Japanese, and Korean animation models without innovation.

3. Development Models and Countermeasures

3.1 Development Models for China' s Animation Industry

3.1.1 Reverse Thinking Construction Model Under this model, animation derivative product manufacturers communicate directly with designers, using comic creation to develop animation characters. Manufacturers invest in animation companies and create derivative products during the promotion and broadcasting phases. This direct manufacturer involvement in derivative development and sales significantly shortens production cycles and enhances economic benefits.

3.1.2 Large Group Monopoly Original Development Model Large animation groups possess substantial capital and strong comprehensive capabilities, investing heavily in animation production and establishing 完善的 (complete) on-line marketing channels. They generate sufficient profits through movie ticket sales, audio-visual product distribution, and derivative sales. This development model requires sound market systems, rapid economic development, technological advancement, and legal environment improvement, representing the primary model for many Chinese animation enterprises.

3.1.3 Industrial Cluster Development Model China' s animation industry development model remains based on learning from and applying foreign successful experiences. China should establish 完善的 (complete) original animation alliances, unite all animation enterprises, achieve industry-enterprise coordinated development, and ultimately form an independent development model that enables effective resource integration across the entire industry.

3.2 Countermeasures for Developing China' s Animation Industry

3.2.1 Building a Diversified Animation Industry Chain Animation is also known as the image industry, where animation characters represent the soul of any work and embody core competitiveness. Therefore, developing the animation industry requires brand awareness and the creation of compelling characters. Second, integrated industrial development should be achieved while intensifying derivative product development as the primary means for enterprises to enhance economic benefits. Finally, the downstream animation industry must form industrial clusters to improve overall competitiveness by integrating advantages across enterprises and demonstrating cluster benefits. Additionally, strengthening cooperation between modern animation industries and mobile communications, online gaming, and internet sectors can expand influence and provide

strong support for China's animation industry development while showcasing new media advantages.

3.2.2 Increasing Capital Investment in the Animation Industry Unlike other industries, animation requires substantial capital investment and advanced technology, making it an intensive cultural creative industry that cannot complete preliminary creation without strong financial support. This necessitates policy 倾斜 (inclination) from government agencies to formulate industry-appropriate measures while organizing multi-channel investment to achieve diversified development in investment methods and 主体结构 (subject structure), actively innovating development mechanisms. Specifically: first, the government should increase investment and attract diversified capital to promote industry development; second, enterprises must increase investment in animation design and creation; third, enterprises should actively cooperate with advanced foreign animation companies to co-produce era-appropriate products and 借鉴 (draw on) foreign operational and production models; fourth, government and enterprises should strengthen cooperation to provide foundational conditions for successful animation promotion and favorable support for derivative product development.

3.2.3 Accelerating Talent Cultivation and Market Development According to current statistics, while China's cartoon animation education institutions have multiplied, annual animation graduates number only about 300. Including other social training institutions, the total annual talent supply reaches approximately 1,000—far from meeting the industry's enormous talent gap. Therefore, China's vocational colleges should comprehensively establish animation training programs to provide strong talent support for industry development, offering incentives such as government funding and national scholarships while organizing personnel for overseas training. Talent cultivation strategies must continuously nurture creative animation talent alongside management professionals to ensure adequate talent across all industry aspects. Government management departments should establish animation associations or other coordinating organizations to promote industry development from a national strategic perspective. This requires rapidly establishing integrated development pathways for talent, capital, information, technology, and innovation to effectively connect all segments, break away from traditional derivative product models, form larger industrial chains, and strengthen comprehensive 立体化 (three-dimensional) development to achieve leapfrog industry progress. Furthermore, China's traditional culture should be fully expressed to promote the great Chinese spirit and effectively resist foreign cultural invasion.

3.3 Learning from Foreign Animation Industry Development Experience

First, purchasing foreign animation copyrights: Japan's Ministry of Foreign Affairs, through its "government development assistance" program, uses 2.4 billion yen in "cultural 无偿援助 (non-reimbursable aid)" funds to purchase animation

broadcasting rights directly from producers and provide these animation products free to television stations in developing countries that lack the financial capacity to purchase them. However, this free access is not permanent; after these countries develop dependence on Japanese animation products, normal pricing resumes to generate economic benefits. Second, intellectual property protection must be strengthened. Only by protecting cultural creativity can sound economic return mechanisms be established to ensure normal industry operation. Third, clearly defining the animation industry's nature in legal provisions provides strong legal guarantees for healthy development and effectively constrains behavior to prevent social harm. Fourth, industrial guidance should be enhanced through official or semi-official institutions that provide guidance across the entire industrial chain from comic creation to production, distribution, and sales to ensure smooth implementation of all segments. Fifth, comprehensive animation industry strength should be enhanced by integrating enterprise service 渗透 (penetration) functions with industrial resources. Establishing 完善的 (complete) design platforms can provide opportunities for rapid industry development. Increased capital investment, 完善的基础设施 (complete infrastructure), and high-level training institutions provide favorable support for industry development. Under market economy influence, providing favorable support for animation industry talent education to enhance comprehensive industrial competitiveness constitutes important government management responsibility. For example, *One Piece* by Japanese manga artist Eiichiro Oda, serialized in *Weekly Shōnen Jump* since 1997 and adapted into a television animation broadcast on Fuji Television since October 20, 1999, offers valuable experience for China's comic development. By absorbing Oda's creative inspiration and learning from advanced foreign animation industry development experiences, China can achieve innovation in its own animation industry and promote its development.

3.4 Emphasizing Originality and Cultivating Local Animation Stars

Originality represents the primary means of manifesting animation value and constitutes an important measure for China's animation industry to achieve long-term development, determining whether the entire industry can develop normally. Therefore, national supervision must emphasize originality management by training and developing animation talent with advanced qualities and professional technical skills who possess innovation capabilities—the foundation of China's animation industry development and a focus requiring national investment. Taking the widely broadcast *Pleasant Goat and Big Big Wolf* as an example, merchants have recognized its enormous economic benefits, providing motivation for original creation. Within three years of the animation's release, the original production company established strategic partnerships with multiple merchants to develop numerous derivative products including audio-visual books, plush toys, clothing, food, and other children's development-related products. Current market responses indicate that derivative product income has far exceeded broadcast revenue, demonstrating substantial economic benefits.

Animation industry constitutes an important form of cultural industry. Promoting industrial development requires full emphasis on innovation and development to actively facilitate China's animation industry progress. However, given current realities including insufficient originality and incomplete industrial chain development, achieving industry growth necessitates resource integration, establishing 完善的 (complete) talent training systems, gradually enhancing animation product brand value, achieving deep derivative product development, and creating uniquely Chinese animation industry development to contribute to Chinese cultural promotion.

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