

The Development Status of China's Comic Industry Platforms in the Context of New Media

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ABSTRACT

In the 21st century, the development of the Internet has provided new ideas for China's comic industry and the progress of new media has created noticeable impact on the comic publishing industry. The coverage, audience, production and many other aspects of the comic industry have been greatly changed. According to the current status, this paper analyses the development status of China's comic industry platforms in the context of new media.

Keywords: *new media, the development of comic industry, industry chain, industry research*

1. INTRODUCTION

Comics go through a way of combining pictures into sequential or nonsequential stationary frames to realize narration with descriptive text such as dialogues or narration. Comic has a lofty position in the history of French literature. As a literary form, it is regarded as the "ninth art" to a certain degree. China's comic industry has seized the opportunities and entered an era of rapid development in the context of the Internet.

2. OVERVIEW OF COMIC INDUSTRY DEVELOPMENT

The term "animation" usually refers to the collective name of animated cartoons and comics and the animation industry is a industry focusing on the production of animation. According to the four stages of the industry development, China's Animation Industry has passed the forming stage and entered growth stage.

Compared with animation, comic has a smaller audience and a higher threshold. But relying on the superior context that has good communicability, short creation cycle, complete stories and strong extensibility, the IP of comics has higher developing value. As a content form being read most, profit of the comic industry mainly consists of payment for the content and the authorization of IP. From the perspective of gross industrial output value increase, the animation industry still shows great potential. The development of comics will help develop the market of derivatives more effectively. The performance of the comic industry's entering the growth stage is like that the scale of comic platforms expands, the number of users increase, types of comics are subdivided and the technology is innovated.

2.1. Comic Enterprise Development

The number of comic enterprises has increased. According to the data from the professional version of Tianyancha, in China, there are more than 540,000 companies whose names or business scopes contain "animation and comics" and status is in operation, continuation, immigration or emigration. As for registered capital, nearly 60% of them have registered capital less than 2 million yuan. According to the commercial registration, in the first three quarters of 2020, more than 154,000 animation-related enterprises has been established, soaring 67.5% year on year [1].

2.2. The increase in output value of the comic industry

The output of the comic industry has made up a larger part of national economy. According to the 2020 China's Animation Industry Development Report, the overall output value of China's animation industry has been increasing year by year from 2013 to 2019. In 2019, the gross output value of China's animation industry reached 194.1 billion yuan, increasing by 13.4% year on year [2].

Compared with nations powerful in comic industry such as Japan and the United States, comic industry in China is facing practical problems such as small market, high cost, and long time. As a result, China's comic has a relatively small return on investment in the realization zone chain dominated by popularity. However, in the context of new media, comic is gradually becoming another mainstream content form following after text and short video. The willingness of mobile reading users to pay for contents is gradually increasing. 54% of comic audience are paying subscribers, and 58% have purchased genuine comic derivatives in the past year. The sales of related products have become an important part of the realization of

animation IP, and users are gradually getting accustomed to paying for contents.

According to the data report released by JRJC on their website, the 2020 epidemic has made the animation and game industry that characterized by online, digit and interaction to rise against the trend. This year, the growth rate of the animation and game industry in Beijing has reached 30%. The output value in the first half of 2020 has exceeded 50 billion yuan. It is expected that the gross output value of China's animation industry will reach 221.2 billion yuan in 2020 and the online comic 3.35 billion yuan.

3. OVERVIEW OF ONLINE COMIC PLATFORMS DEVELOPMENT

Since 2013, intelligent terminals have been rapidly popularizing and online medias have developed at top speed. The sales volume of the old comic magazine giant COMIC GUESTS suffered a vertiginous decline in 2014 [3]. Coupled with the poor follow-up management, its market share has gradually been carved up by other platforms. At this point, the mobile comic platforms quickly occupied the market, and mobile comic rose to become the main part of the comic industry instead of paper comic.

The mobile terminal meets users' needs anytime and anywhere. Now, it is being promoted as extensive entertainment, and the number of online comics audience is also constantly increasing. Meanwhile, compared to web fictions, mobile comics have unique advantages in terms of their display forms, content production and operation. Internet firms like NetEase and Tencent have entered into the comic business in succession and played an active role, which stands for the positive development of the comics industry in the context of new media.

3.1. The development of Internet cartoon platform

China's online comics has experienced more than ten years of development. Up to now, the number and types of online comics platforms in China have been very rich.

3.1.1. Dongmanzhijia

Dongmanzhijia (It means home of animation in Chinese with its website address as "https://manhua.dmzj.com"), established in 2005, developed on the basis of carrying comics and light novels, animation information and online social activity based on forums as well. It is now the oldest integrated animation platform in China.

At the initial development stage of the Internet, with few competitors, Dongmanzhijia developed rapidly. For a long time, Dongmanzhijia has offered its contents to users for free, which won itself a large number of users. But such operation mechanism makes its profit too low to support its subsequent development.

In the era of copyright, Dongmanzhijia attracts users by the newest comic strips, fan works and the sinicization of niche cosmic. Among them, the main part of contents is a large number of sinicized comics translated by hobbyists not for profit, which makes Dongmanzhijia a comic platform with the largest number and most types of comics but in a gray zone of the copyright as well. Therefore, it usually happens that the sinicization group of Dongmanzhijia suspends serializing an excellent niche comic since its copyright was purchased by platforms with large capitals such as "Tencent Animation" and "Bilibili Comic".

3.1.2. Youyaoqi Comic

In April 2006, Youyaoqi was launched as a platform for communication on animation. In June 2009, with the funding of Cludary, Youyaoqi began to be operated commercially. In October, "China's Youyaoqi Original Comics Factory" was officially launched. Currently in China, "Youyaoqi Comic" is the only and largest website purely for original comics, and has accumulated original fans for the development of China's online comic industry. As the first batch of online platforms for comics, Dongmanzhijia has always been in the gray area of copyright while Youyaoqi Comic is known as the starting point of China's original web comics.

However, as those late comers like "Tencent Comic" and "Bilibili Comic" developed, Chinese original comic cartoonists working for Youyaoqi Comic have declined. Different from Dongmanzhijia which has a large number of copyright-free comics, Youyaoqi Comic is facing a serious shortage of comics. At the same time, the "VIP+Chapter Payment" implemented by Youyaoqi Comic is at a disadvantage compared with the "wait and get it free" model of late platforms such as "Tencent Comics". It cannot attract new user to pay for the content and the old users also decline because of the shortage of comics.

3.1.3. Tencent Animation&Comics

In 2012, Tencent Animation&Comics was launched under Tencent public entertainment strategy. At the beginning of 2013, Tencent Animation & Comics has reached a large-scale cooperation with Shueisha on copyrights and become the first comic platform authorized by Shueisha in China. It also declared the arrival of the copyright era in China's comic industry. In the context of it, Manga-Group, Aimanhua, Lightnovel have been shut down one after another because of the copyright issues since the second half of 2015.

At the end of July 2017, Tencent Animation&Comics APP reached a strategic cooperation with Kakaopage, a subordinate mobile content platform of South Korea's Kakao. On August 3rd, it officially formed the model of "wait and get it free", further upgrading the payment model for online comics. This is the first case of officially introducing the business model of a Korean content

platform into China. At the same time, Tencent Animation&Comics targeted at the Korean comic market, which is also maturing. It started to gradually seize market share of Korea's comic platform Webtoon in China.

3.1.4. Kuaikan Comic

Kuaikan Comic was established in September 2014, with Chen Anni, a cyber celebrity as its CEO. Different from traditional paper comic, Kuaikan Comic focuses on Vertical(Transverse)comics with streamlined content, which meets the current fragmented and fast-paced reading needs and then becomes a rising star in the comic industry. In terms of readers targeting, Kuaikan Comic accurately occupied the female market and formed a difference with Tencent Animation&Comics whose domain is the male readers. Besides, apart from the novel reading pattern, Kuaikan has built a multifunctional online comic community which includes the interactive community of readers and cartoonists, the community of users and the live broadcast square, combining reading and community attributes. This feature has also become a highlight of the Kuaikan Comic.

At the beginning of 2017, due to the broken capital chain of the ACG(Animation, Comics, Games) Alliance and the ceased operations of the Pudding Animation Company, the entire animation industry entered a short-term adjustment period in the first quarter. However, with the elimination of negative sentiment and with the abundant market momentum, the frequency of financing disclosures in the animation industry has returned to the right track. In 2017, the comic industry received a total of 1.84 billion yuan in financing, accounting for 46% of capital inflows and rarely exceeding 34% of animation companies. Kuaikan Comic received \$177 million in financing, accounting for 60% of the entire comic industry and taking the leading position in the financing of that year.

So far, China's domestic comic industry platforms have completed the first industrial upgrade, and has soon entered the second stage of industrial development, presenting an industrial structure which features the first-class platforms. At the same time, Kuaikan Comic continues to sign contracts with comic companies and individual cartoonists so as to obtain copyrights and seize China's domestic original market during the development process. Simultaneously, the contracts have a certain degree of monopoly on the cartoonists. As of October 2018, the industry exclusivity rate of Kuaikan Comic reached 53.5%, more than twice that of the Tencent Animation&Comics which ranked the second. This makes Kuaikan become a well-deserved leading platform in the comic industry.

3.1.5. Netease Comic and Bilibili Comic

Netease Comic was established in August 2015. It has collected more than 20,000 comic works, more than 600 exclusive comic artists from China and other countries, and

nearly 40 million registered mobile users. In addition, Netease has cooperated on overseas copyrights with Shueisha, Kodannsha, Kadokawa, and SQUARE ENIX. The types of comics are greatly abundant on this platform. There are more than 1,000 overseas comic works, and the platform is competing with Tencent Animation&Comics in the China's domestic comic copyright market.

However, in the latter half of 2017, the fierce competition between small and medium platforms in the form of weak-weak alliance also continued to a certain degree till 2018. In August 2018, Big Hornworm Comic was accused of owing millions of dollars in payment fees to the cartoonists. In December 2018, Bilibili acquired Netease Comic and completed the "comic" section of the bilibili ACG (Animation, Comics, Games) content ecosystem. In November 2019, Netease Comic announced the suspension of service, and its assets gradually completed the transfer to Bilibili Comic. So far, Bilibili Comic has been involved in Tencent's copyright competition, competing with Kuaikan Comic for the right to sign contracts with outstanding domestic cartoonists, and has become one of the three leading comic companies in China's comic industry.

3.1.6. Yiben Comic

Yiben Comic is an original comic platform owned by COLORROOM PICTURES, focusing on young readers. Its platform cooperates with many professional colleges, such as the Animation School of Communication University of China. Compared with other comic platforms, it has strong characteristics of academism, experimentation and artistry. At the same time, from the consideration of the film and television of comics, and the reflection on the chaos of the snackable comic market, Yiben Comic abandons the relatively saturated "domineering president" and love themes in the market, and focuses on the three themes of myth, reality, and science fiction. Thus, it offers comics for the adult reader group. To a certain extent, this company has filled the gap in the China's comic industry. However, this platform has a relatively small number of comic works and faced an extremely serious problem, that is, the source of domestic original cartoonists being insufficient.

As the leading company in China's animation film industry that has gradually risen, COLORROOM PICTURES has produced a number of high-grossing domestic animation films from 2016 to 2019. Yiben Comic has created "Comic+Movie" model for the first time. In the following five years, Yiben Comic will aim at turning comic works into animations. And through the new model of "Comic+Movie", in cooperation with COLORROOM PICTURES, it will try to produce films and television productions originated from 10 comic works. In the future, Yiben Comic may become a typical case of the IP-based industry of China's comic industry.

3.2. Analysis of users on the comic industry platform

3.2.1. Increase in the number of users on the comic platform

From 2013 to 2014, the number of Internet comics users in China gradually increased, mainly consisting of users preferring Japanese comics. These users mainly focused on reading pirated Japanese comics reposted by individuals on forums or Baidu Tieba. From 2014 to 2015, major corporate platforms began to deploy online comic platforms, and many comic applications sprung up. Subsequently, the comic applications adapt to the scattered time in modern life, and take the advantage of not being limited to time and location. As a result, using comic applications have become a major developing trend, leading to a sudden increase in the number of Internet comic users in China. In 2016, the content of comics became more and more abundant, and the scale of users continued to expand. The growth rate reached 76.22%.

After entering 2018, the Internet traffic dividend no longer exists. However, due to the emergence of high-quality animation works in China and other countries, the scale of two-dimensional users has entered a period of steady growth. In 2019, ACG cultural audience reached 390 million, and it is expected to exceed 400 million by 2020.

3.2.2. User Portraits of Comic Platforms

Although the audience group of the comic content market is relatively small, users are highly core and loyal, which keeps the products active. Among them, the post-90s and post-00s respectively account for 94.30%, an absolute advantage, the post-95s accounted for 57.6%, and users under 25 accounted for more than 61%. Post-80s and post-90s users from 25 to 40 years old with a certain spending strength account for 31.67%, which is also considerable [4]. In the golden age of online literature development, users were mainly the post-80s. As this mainstream group enters middle age, new content formats such as comics and short videos have attracted the attention of a new generation of young users. At the same time, compared with those born in the 1980s, comic users born after 1995 have a higher intention to pay for comic-related industries. Regardless of platform activity or payment rate, comics are catching up with online texts. The new generation gradually gains the right to speak in the market, and the reading consumption behaviours are gradually changing.

4. CONCLUSION

With the continuous output of the two-dimensional culture, audience has changed their previous inherent impressions of the inferiority of the animation market, and mature themes and contents have begun to emerge in large numbers. Non-

low-child content provides a wider market and user circle, a large payment space, and a complete industrial chain, which are the necessary conditions for the horizontal development of the industry.

Based on the two-dimensional culture's emotional recognition of users, China's domestic animation IP will be more in line with the spiritual world of local consumers than overseas IP. At the same time, China domestic animation IP with better controllability will also have better ways of interacting with brands and project parties, and more relaxed cooperation plans. The cooperation will not be limited to simple forms such as content placement and IP authorization, but will gradually develop in depth. IP development of Chinese comic industry will become a popular trend in the future.

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