

Demand for Anime Content



Agenda

- What is demand & why does it matter
- The rise in demand for anime content
- Travelability of anime
- The anime audience
- Audience segmentation



What is Demand & Why Does it Matter?





WELCOME TO

THE ATTENTION ECONOMY

WE BUILT THE ANSWER TO THE QUESTION

What content do people want around the world?

1

Capture over 2 billion people interacting with content online



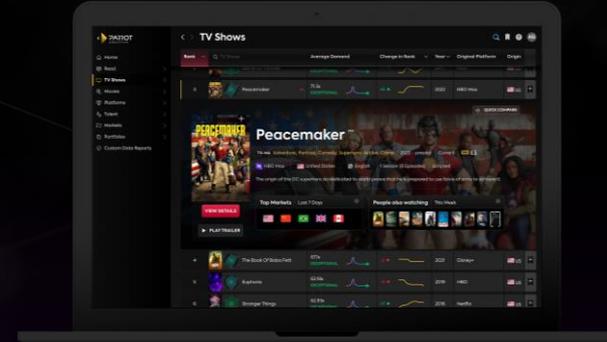
2

Extract the signal from the noise



3

Provide the only global content demand system



IN ALL MARKETS



IN ALL LANGUAGES

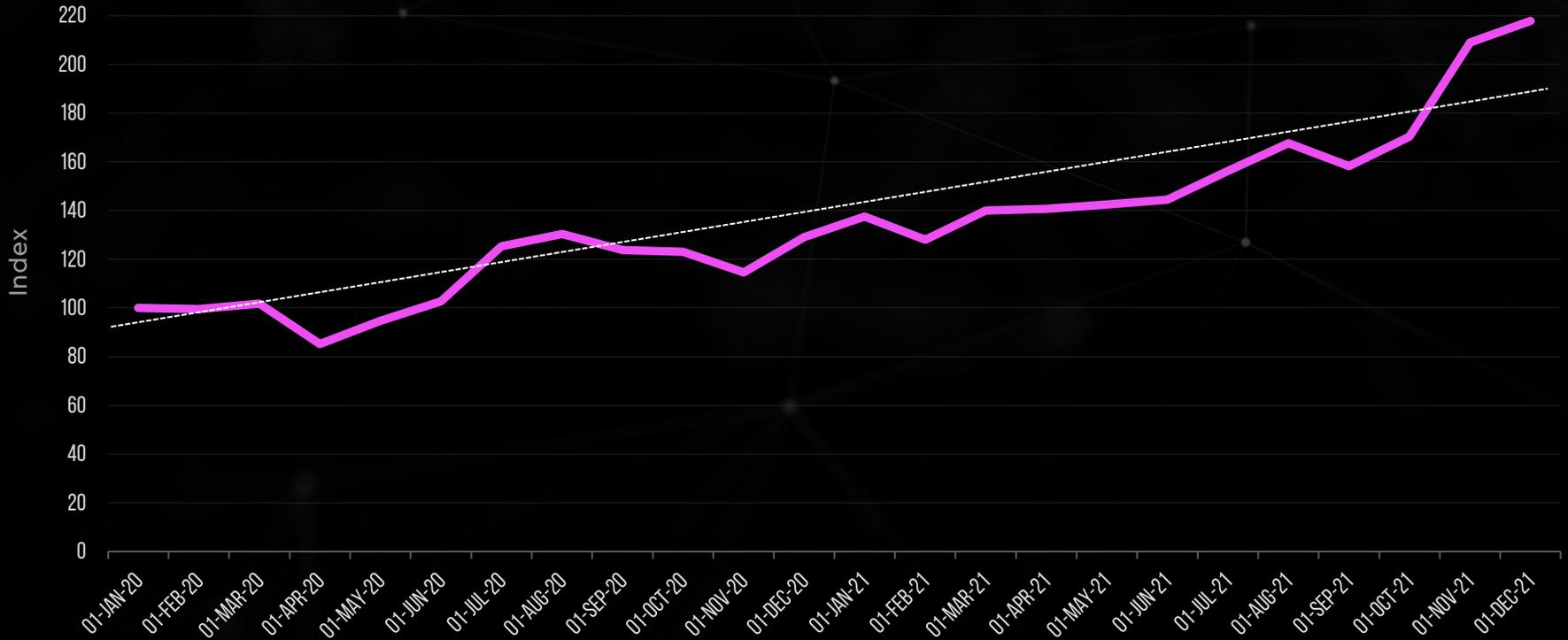


ACROSS PLATFORMS

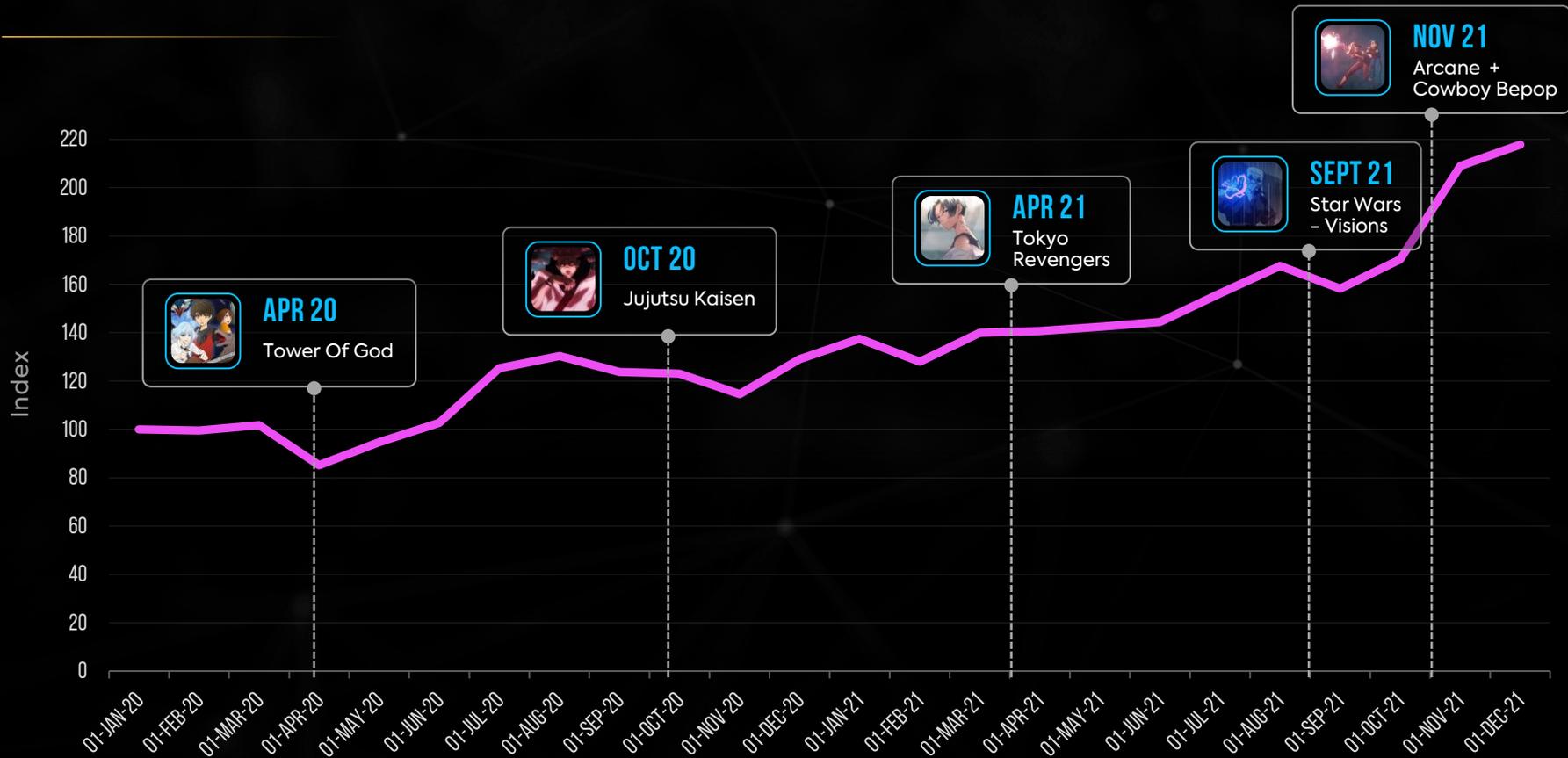
The Rise in Demand for Anime Content



Demand for anime content soars



Demand for anime content soars

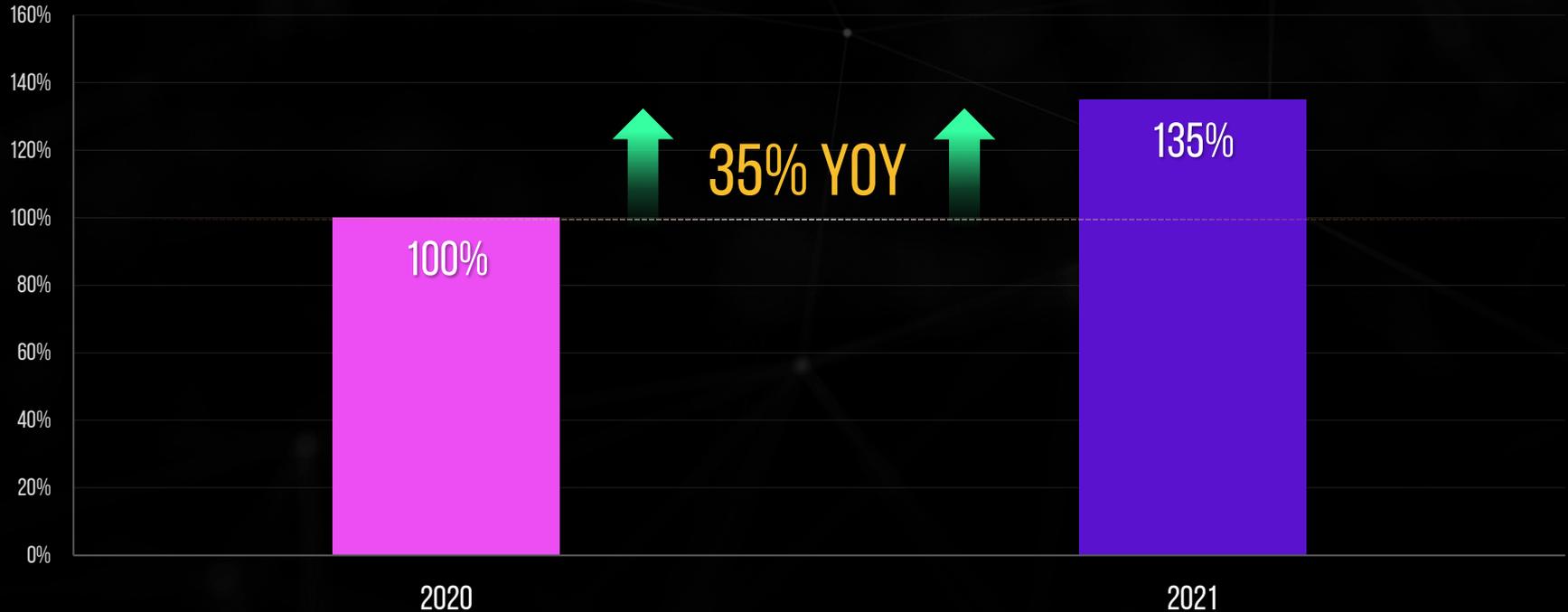


Demand for anime content has grown due to many factors in particular...

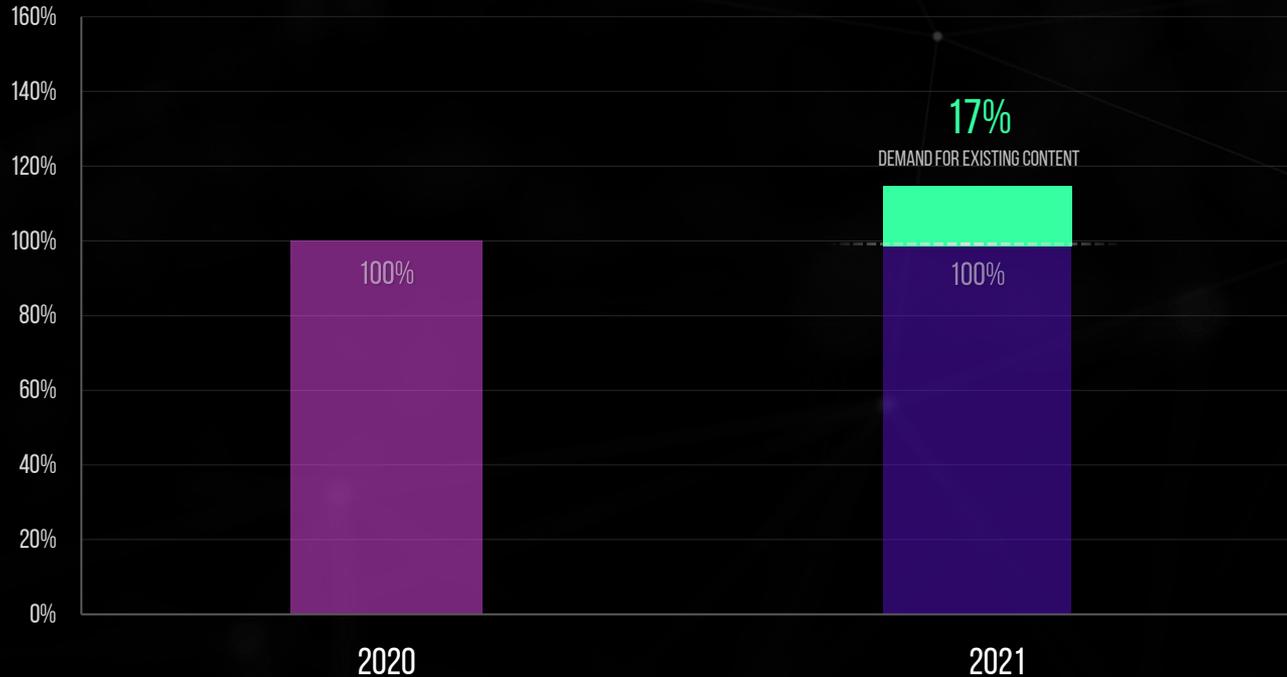
- YoY growth in demand for existing anime content from 2020
- Overall growth in the supply for new anime launches in 2021
- Broader audience reach through global OTT players
- Global market growth



We've witnessed a +35% yoy increase for anime content demand from 2020 to 2021



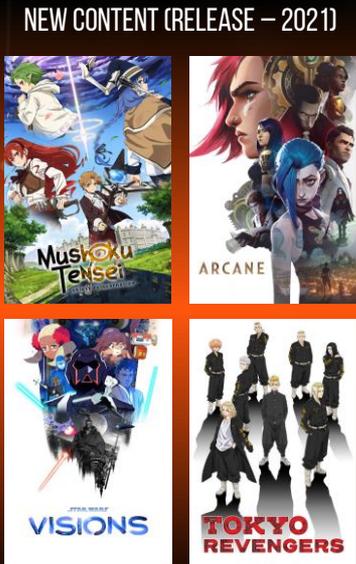
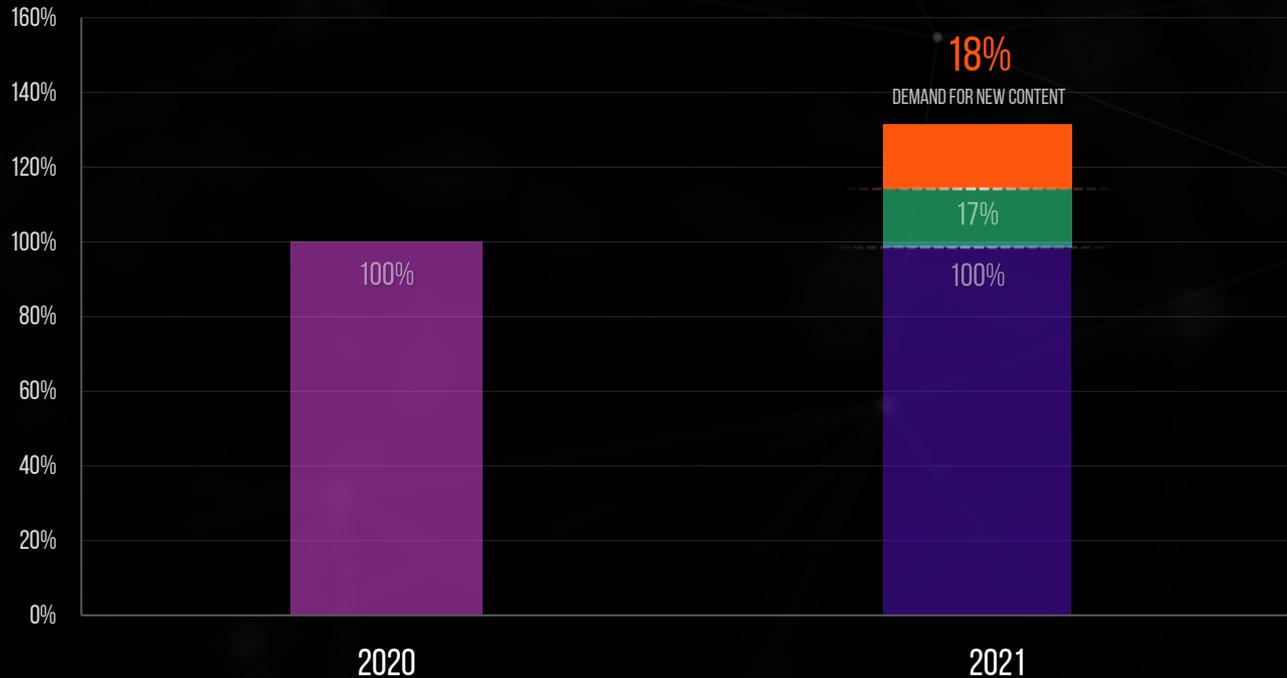
17% of that increase has come from the growth of existing anime content



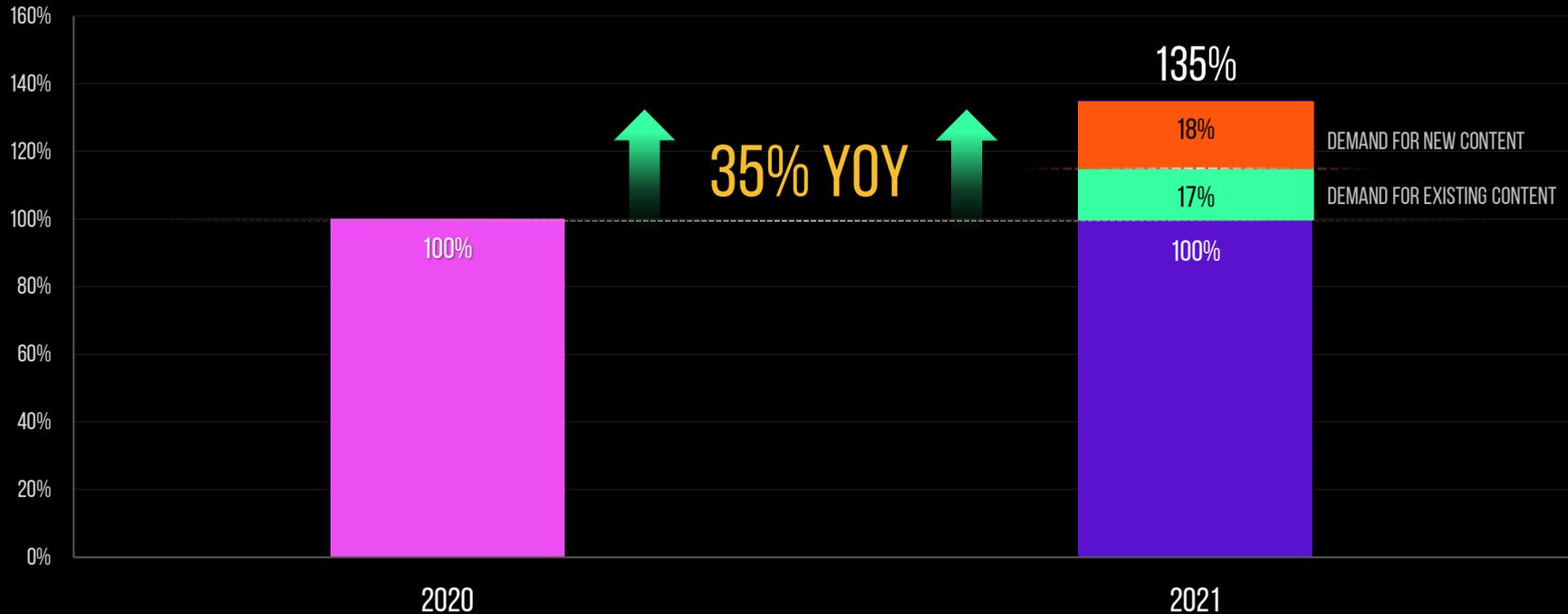
EXISTING CONTENT (PRE -2021)



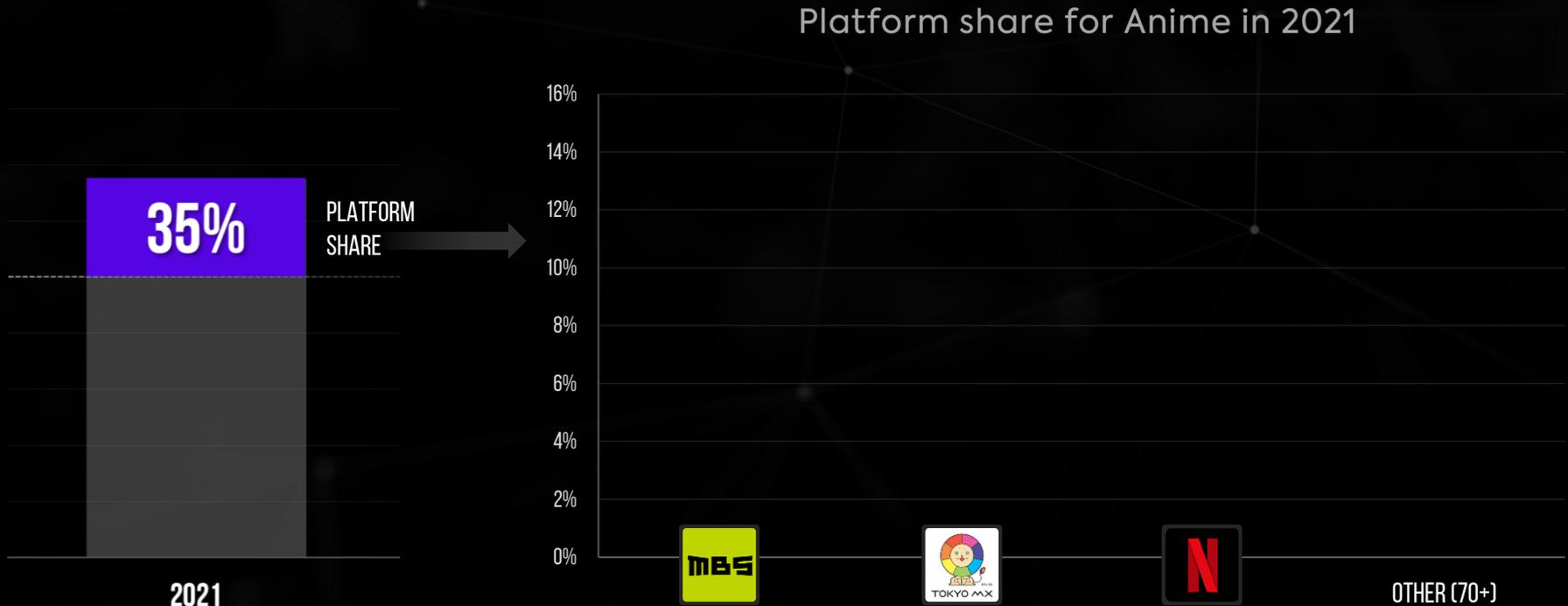
18% of growth was driven by a key new anime launches in 2021



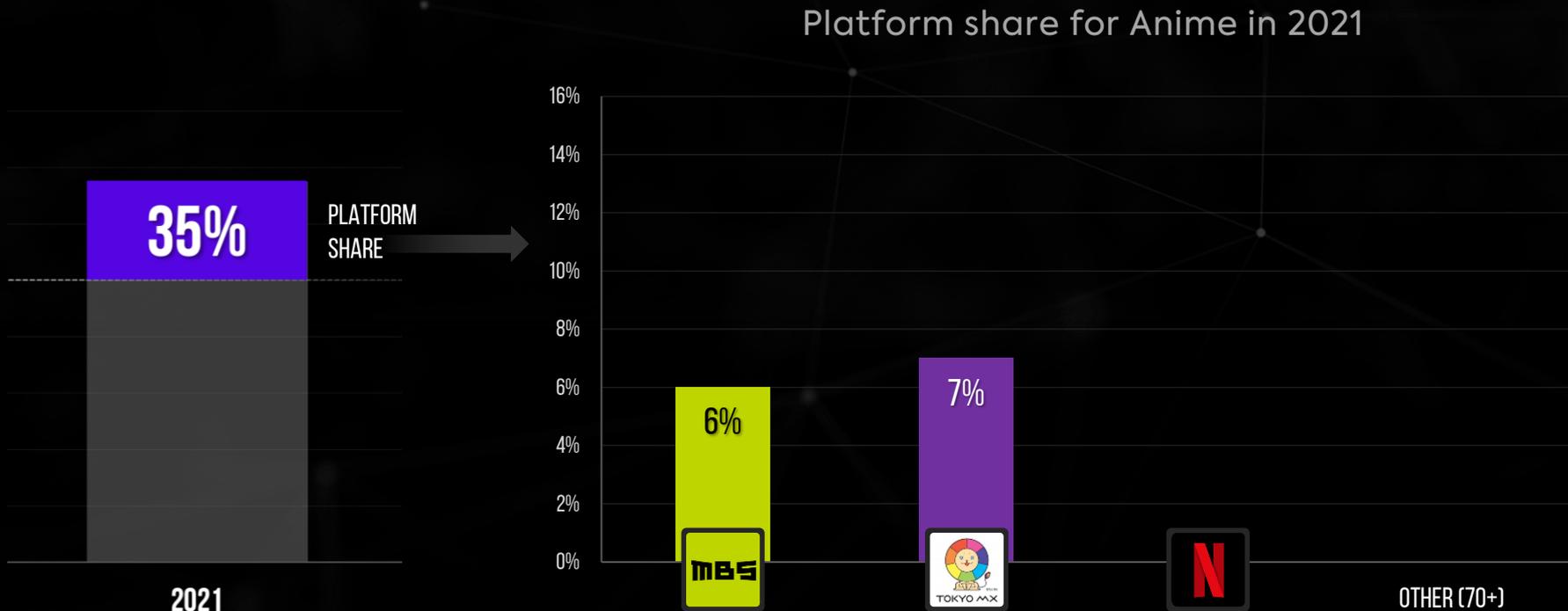
The combination of an increase in demand for **existing content** coupled with **new content** launches has led to that 35% yoy uplift



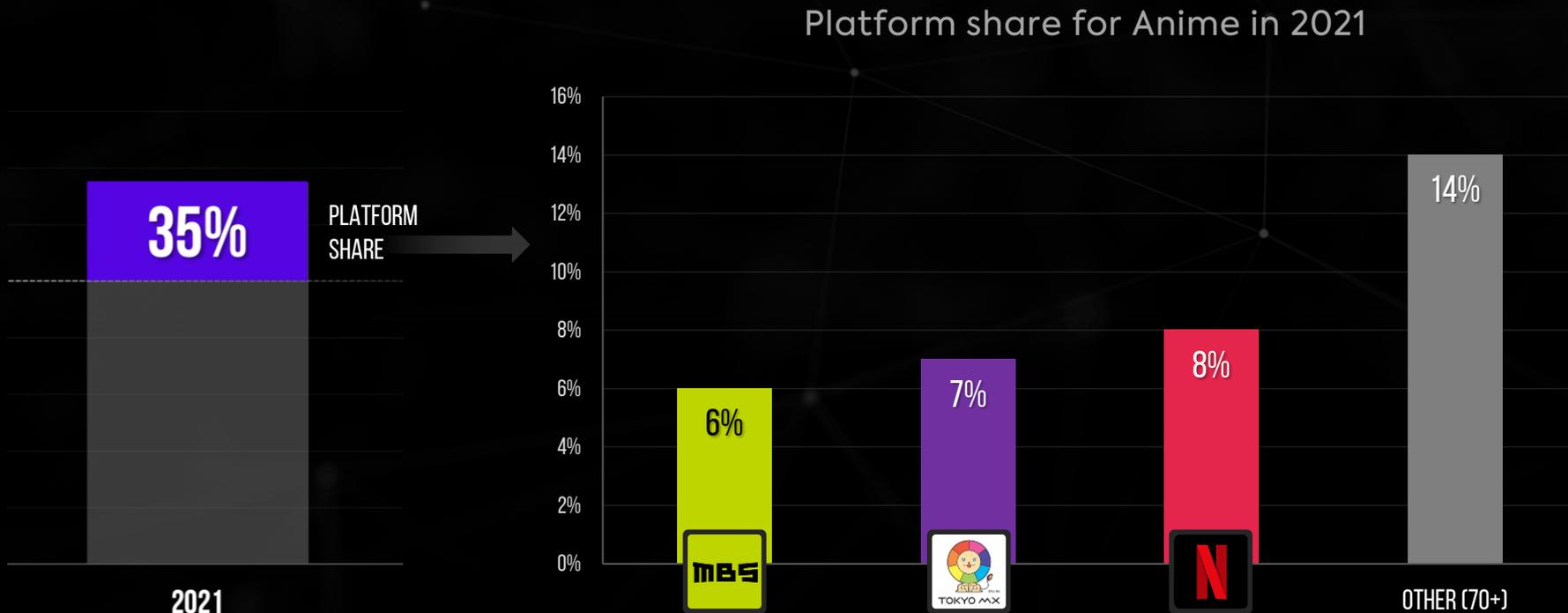
There has been a few key platform contributors to the overall growth of anime



Unsurprisingly, Japanese networks **MBS** & **Tokyo MX** have been key growth drivers



Netflix has contributed more than half the growth compared to 70+ other platforms



- 🍌 Anime has become a cornerstone for investment by Netflix
- 🍌 40 new anime titles set to debut this year alone
- 🍌 Total number of hours spent watching anime grew by +22%
- 🍌 Over half of its c.222 million subscribers watched anime in 2021

Arcane, a huge part of that Netflix growth, has lured in a much more mainstream audience



The Expanse



The Book Of Boba Fett



The Witcher



The Wheel Of Time



Peacemaker



WandaVision



Foundation



Raised By Wolves

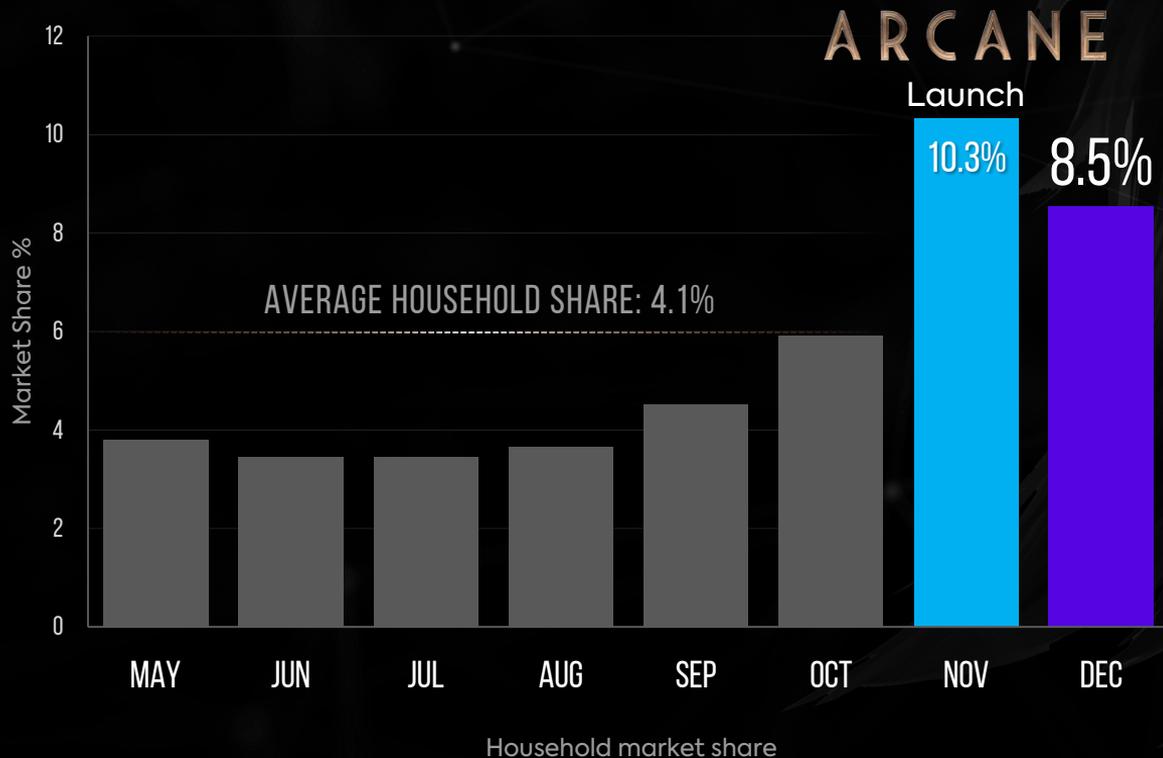


Rick And Morty



Ted Lasso

Arcane has ignited the anime fire...



Households that identify themselves as engaging with Anime content has **more than doubled** since the launch of Arcane in 2021.

On the contrary, a more niche IP such as *Jujutsu Kaisen*, we see appeal to a heartland viewer base

Jujutsu Kaisen: People Are Also Watching



Attack On Titan



Demon Slayer:
Kimetsu No



The God Of High
School



Zero -starting Life
In Another World



Moriarty The
Patriot



Is It Wrong To Try To Pick
Up Girls In A Dungeon?



Haikyuu!!



Redo Of Healer



Sword Art Online

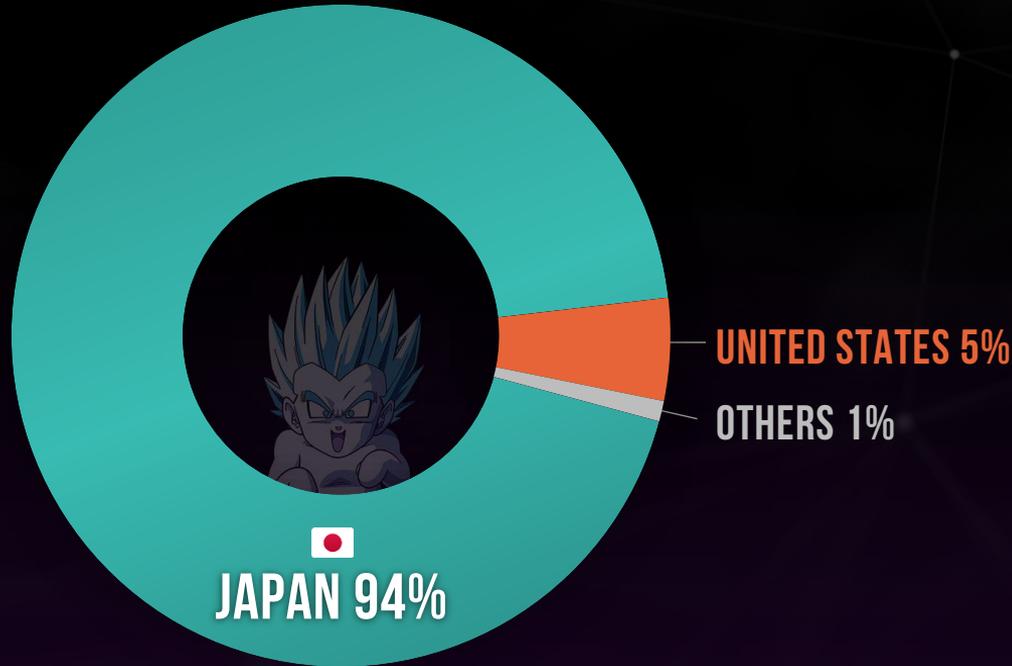


That Time I Got
Reincarnated As A Slime

Travelability of Anime

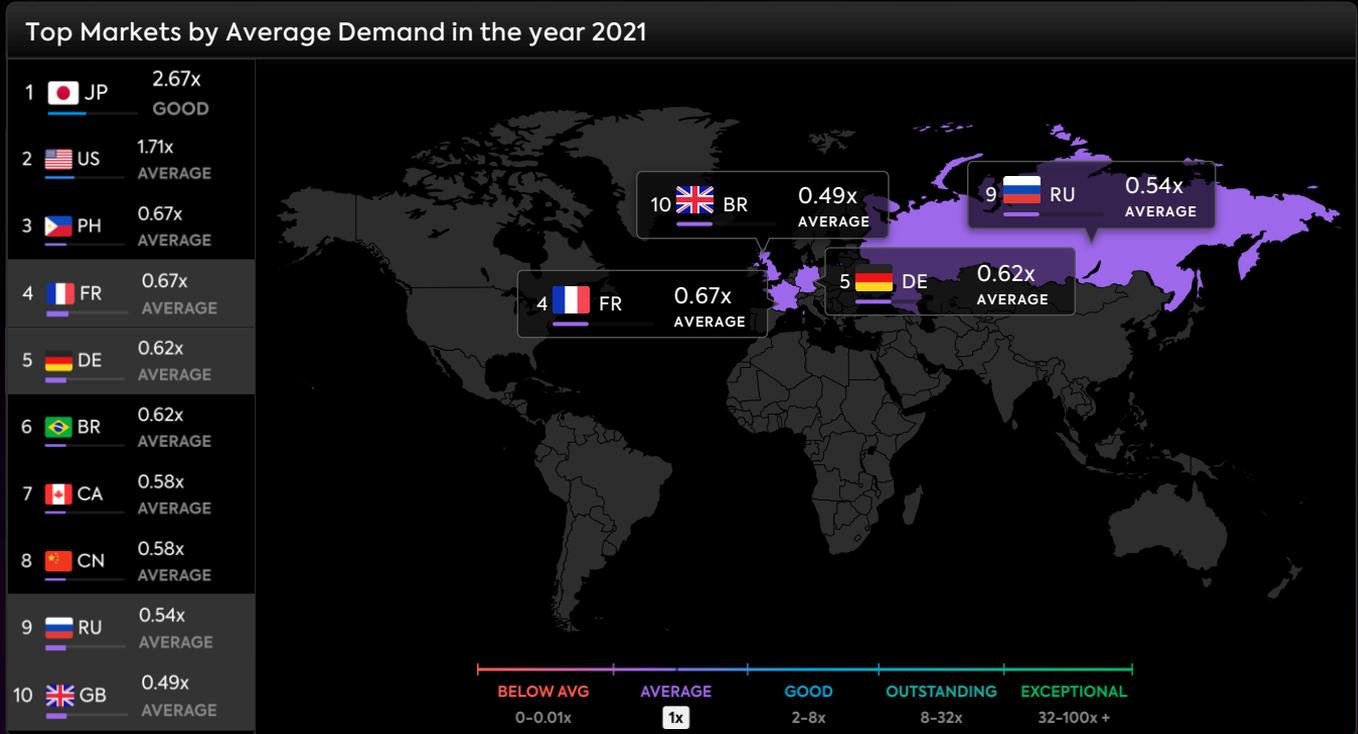


Japan is the primary producer of anime content



France is the top European market

DEMAND360



Top 10 anime shows globally

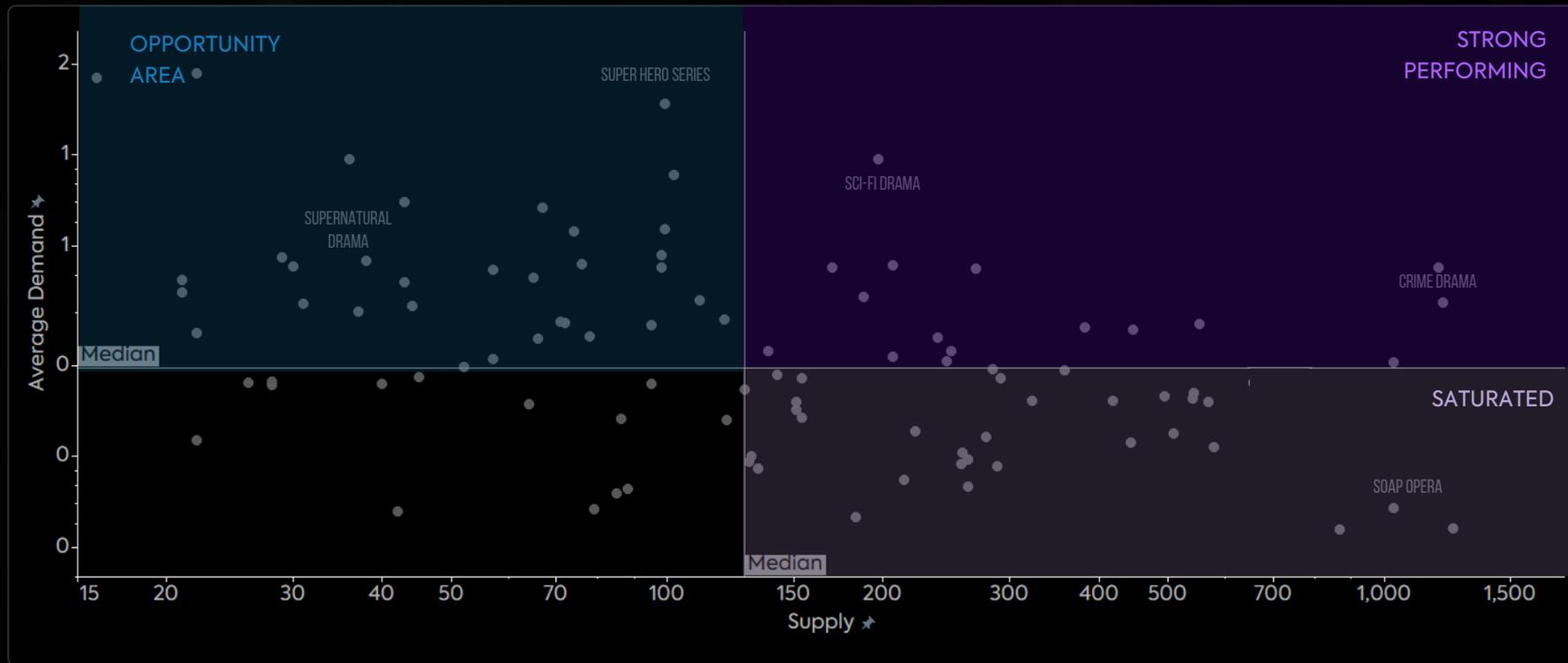
Ranking within Priority Markets (10 markets most in-demand)

RANK	TITLES										
		JAPAN	US	FRANCE	PHILIPINES	BRAZIL	GERMANY	CANADA	CHINA	RUSSIA	UK
1	Attack On Titan	1	2	1	1	1	1	2	1	1	2
2	My Hero Academia	2	1	2	2	2	2	1	9	3	1
3	Jujutsu Kaisen	4	6	4	3	4	3	4	3	9	3
4	Arcane	71	3	5	6	5	4	5	2	5	4
5	One Piece	7	11	3	4	7	7	9	10	19	9
6	Naruto: Shippuden	102	10	10	8	6	10	11	22	28	14
7	Naruto	32	7	6	5	3	6	7	91	2	8
8	Pokémon	15	5	17	11	18	9	3	41	38	5
9	Dragon Ball Super	60	8	8	19	14	17	12	34	49	11
10	Dragon Ball Z	44	4	7	20	8	11	6	44	73	6

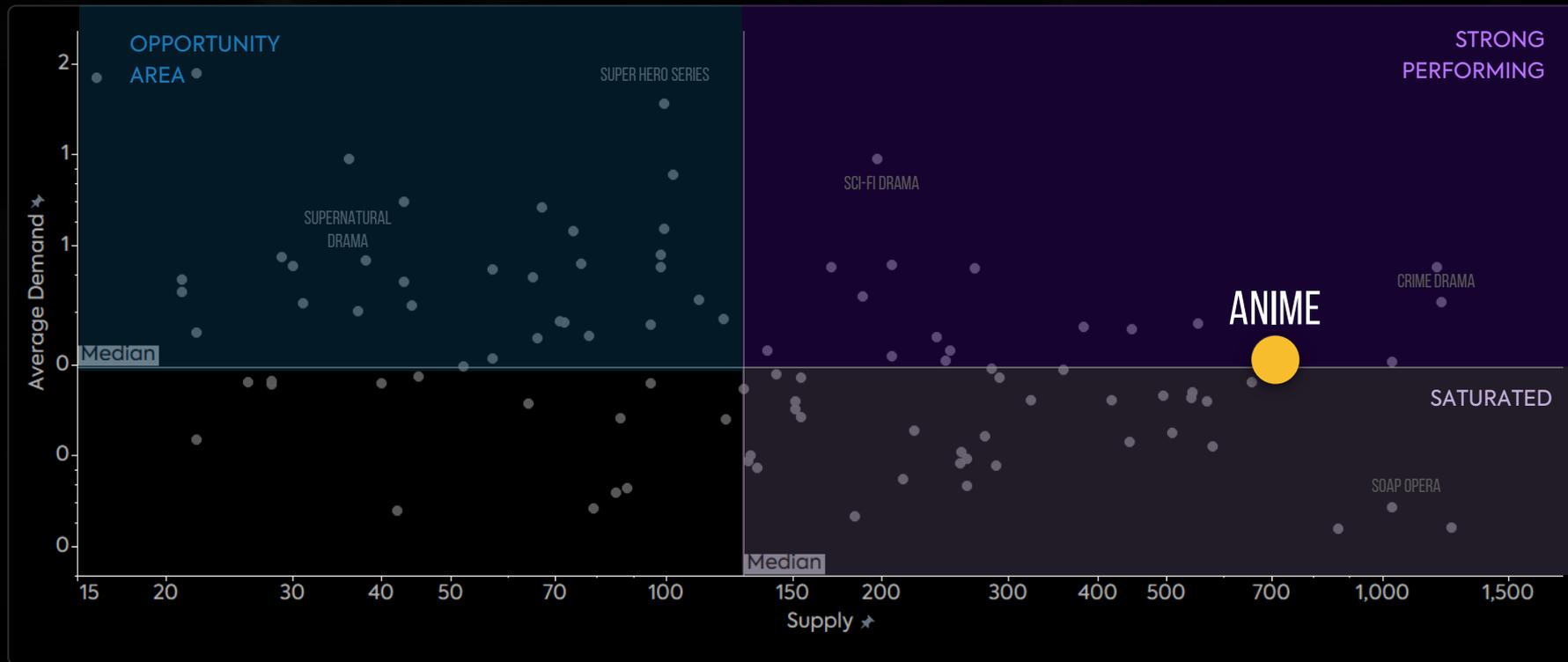
White Space Opportunity & Genre Trends



Our supply and demand analysis can help to identify areas of opportunities for production & commissioning



Anime currently sits within the strong performing area on our supply and demand chart, but could it be reaching a point of saturation?



Action, fantasy & adventure are amongst the top trending sub-genres for anime content



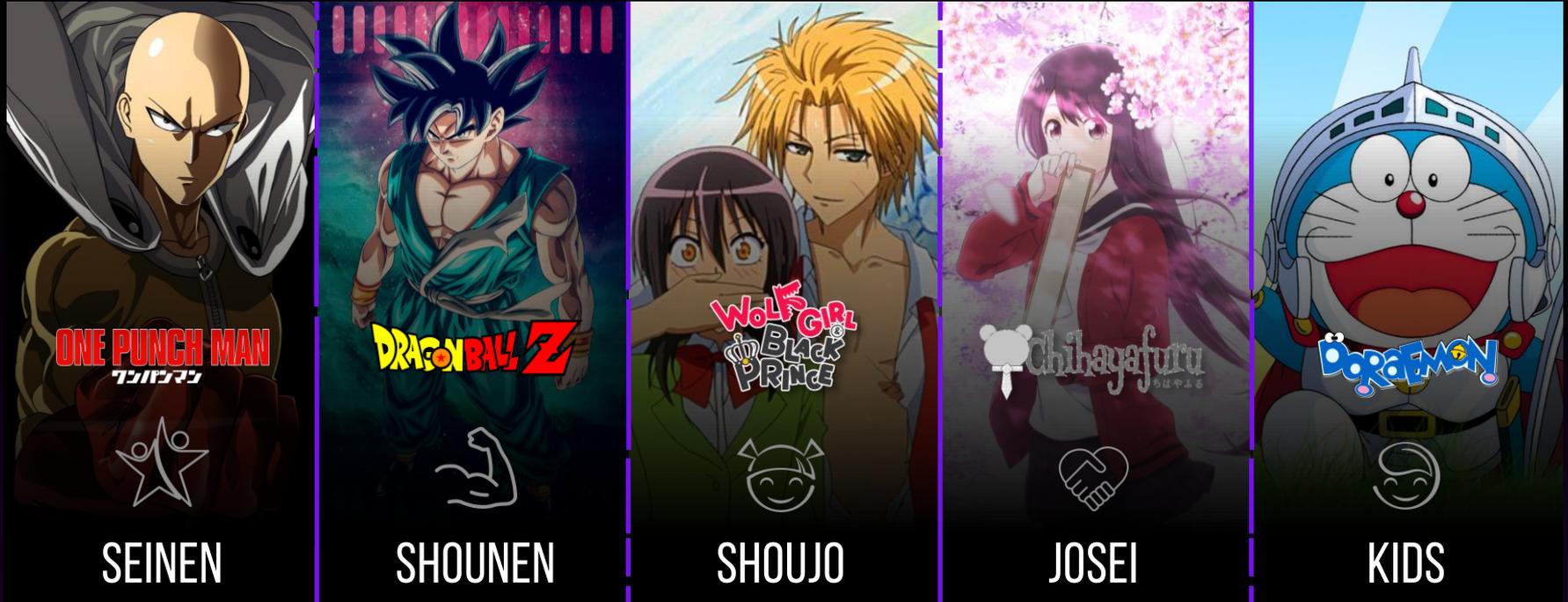
Other trending genre tags within the anime space



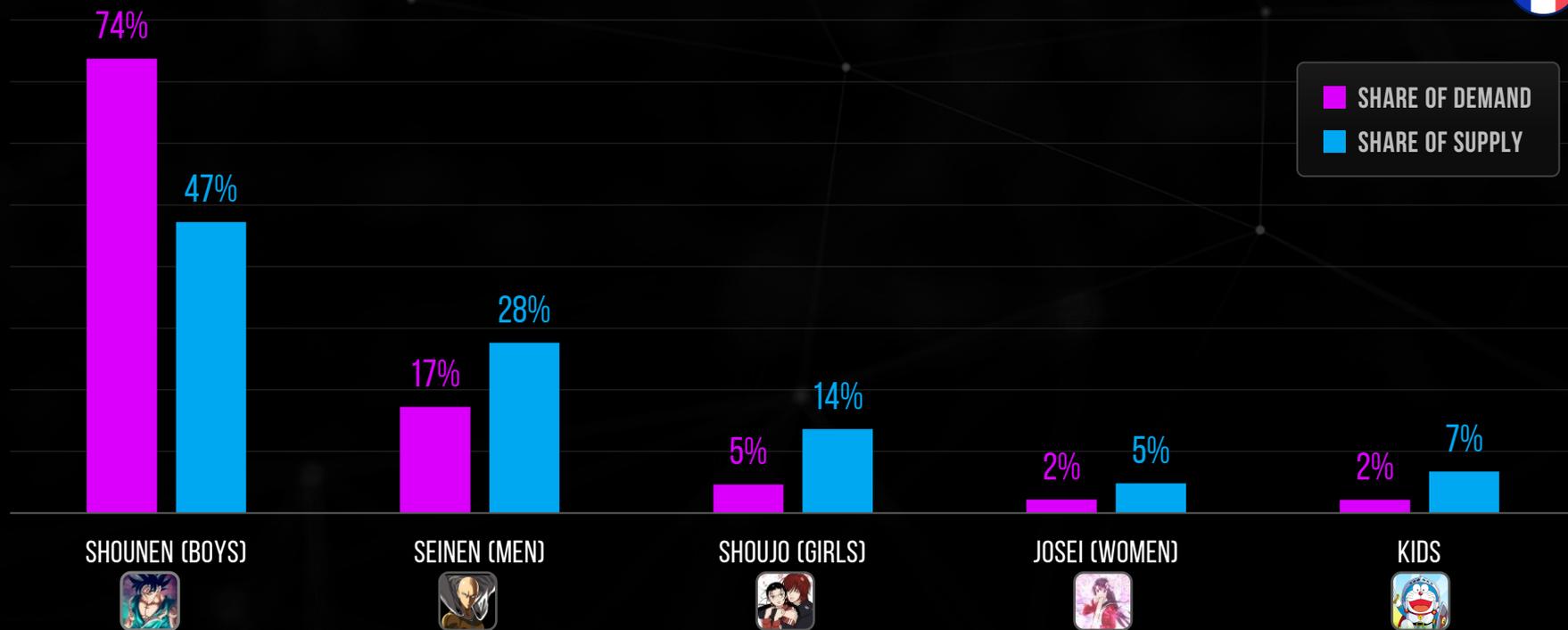
Anime leans on a variety of genres to engage diverse audiences & cultures



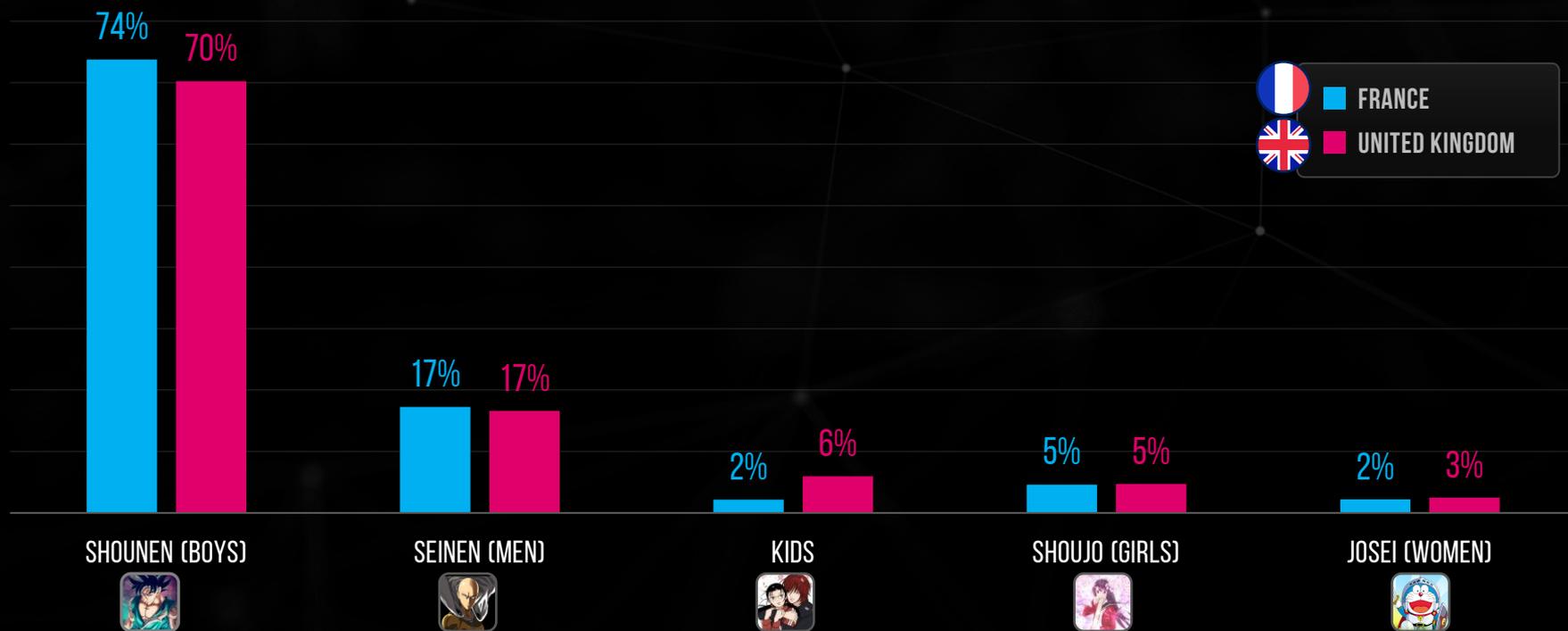
We can cut demand for Anime content using the traditional classifications



There is a clear demand surplus for *Shounen* content in France with room for growth elsewhere



France produces a higher share of demand for *Shounen* whilst the UK returns 3x the share for *Kids*



The Anime Audience



Anime resonates with a younger demographic



Understanding which titles resonate with the Above 40's can help to serve the older demographic & grow overall reach

GEN Z ←

→ ABOVE 40



DETECTIVE
CONAN



DEATH
NOTE



TOKYO
GHOUL



BLEACH

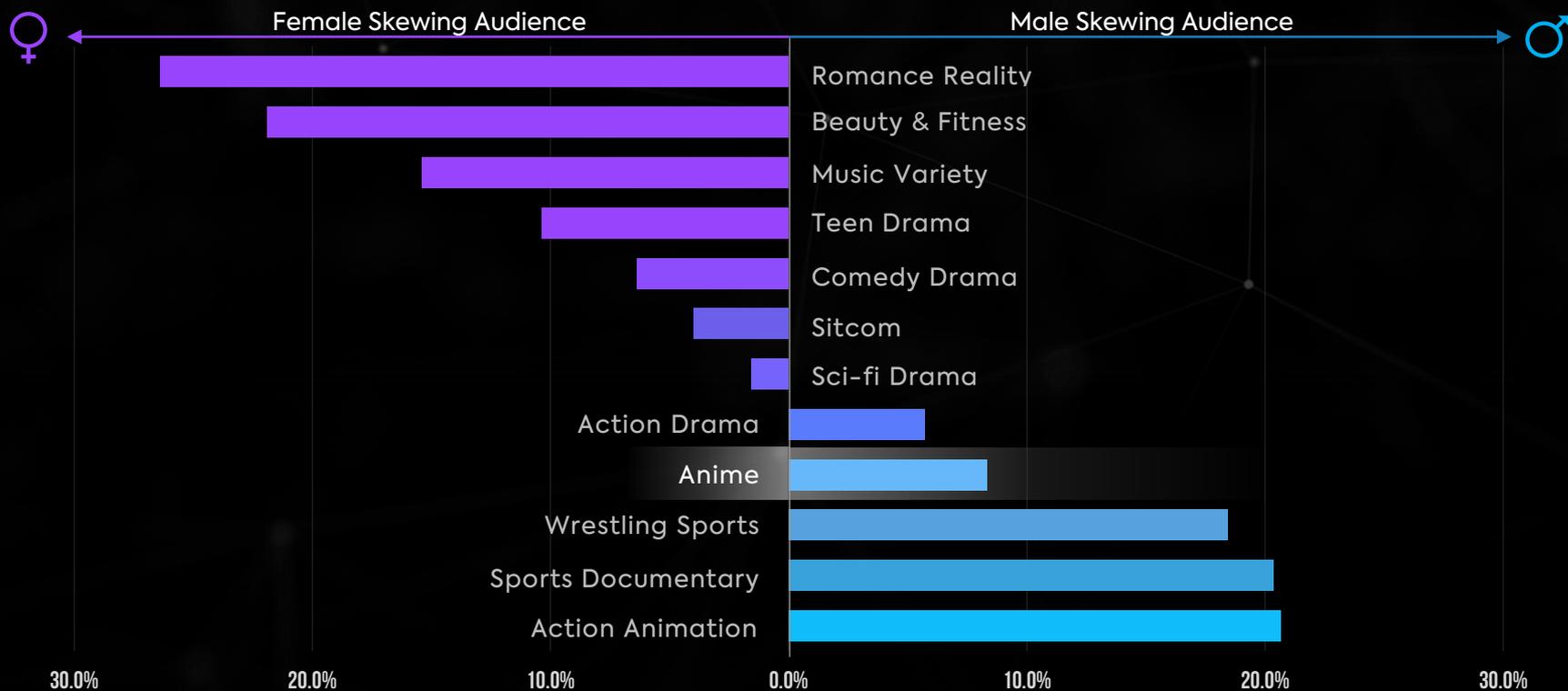


ULTRAMAN

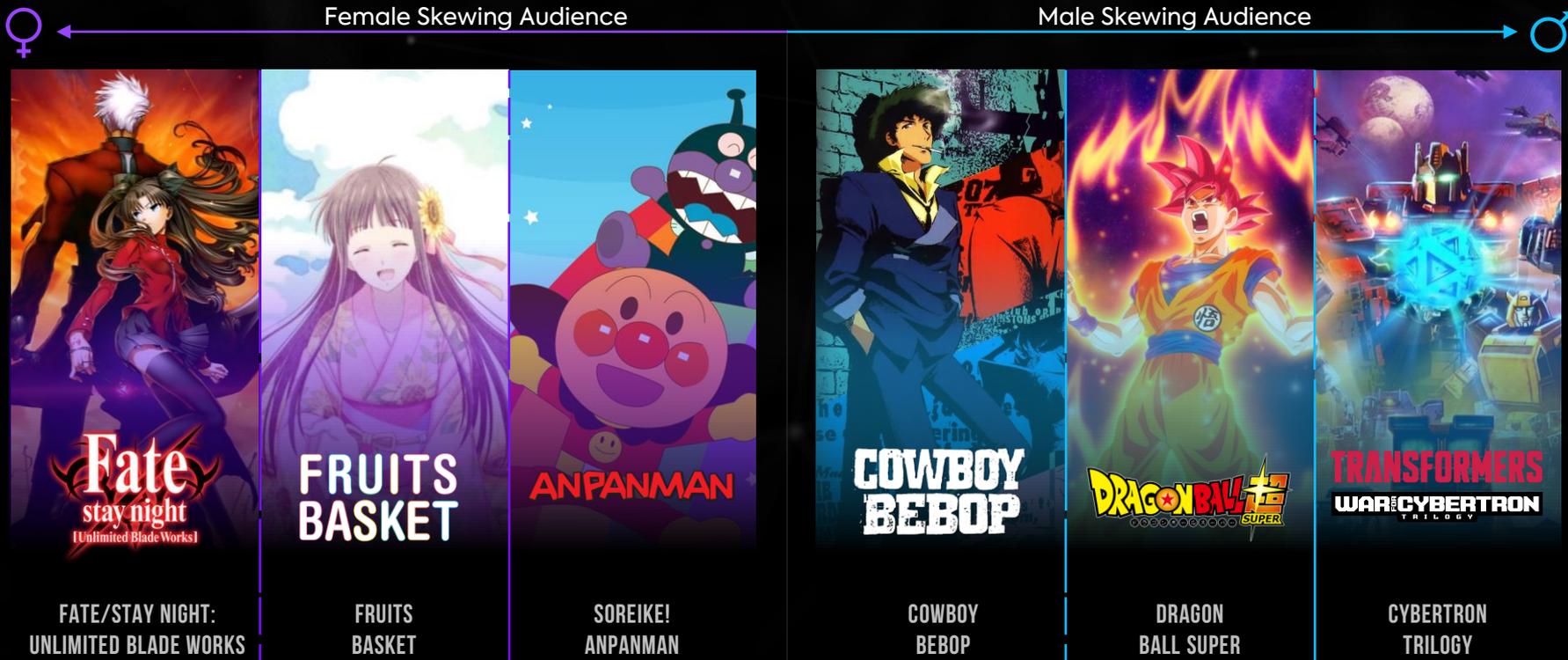


CYBERTRON
TRILOGY

The Anime audience skews predominantly male



What learnings can we take from the more female skewing anime titles?



Audience Segmentation



Parrot can analyse anime consumption by *heavy*, *medium* & *light* households

Summary of segments

Heavy viewing households:

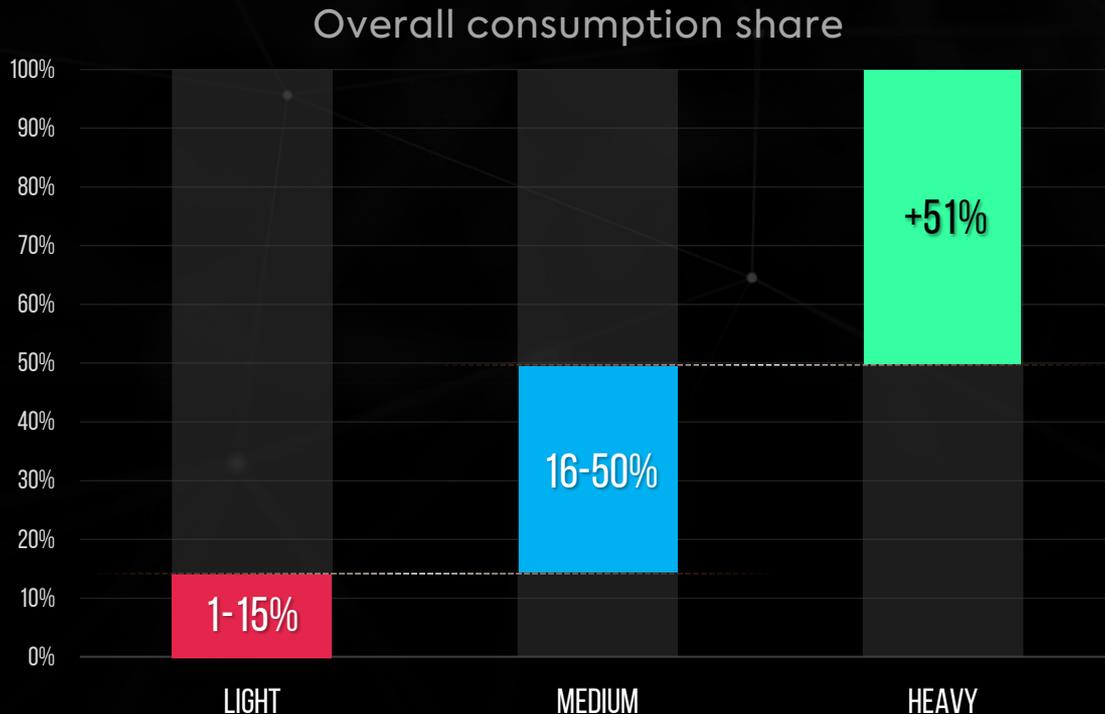
Anime content makes up **+51%** or more of overall consumption

Medium viewing households:

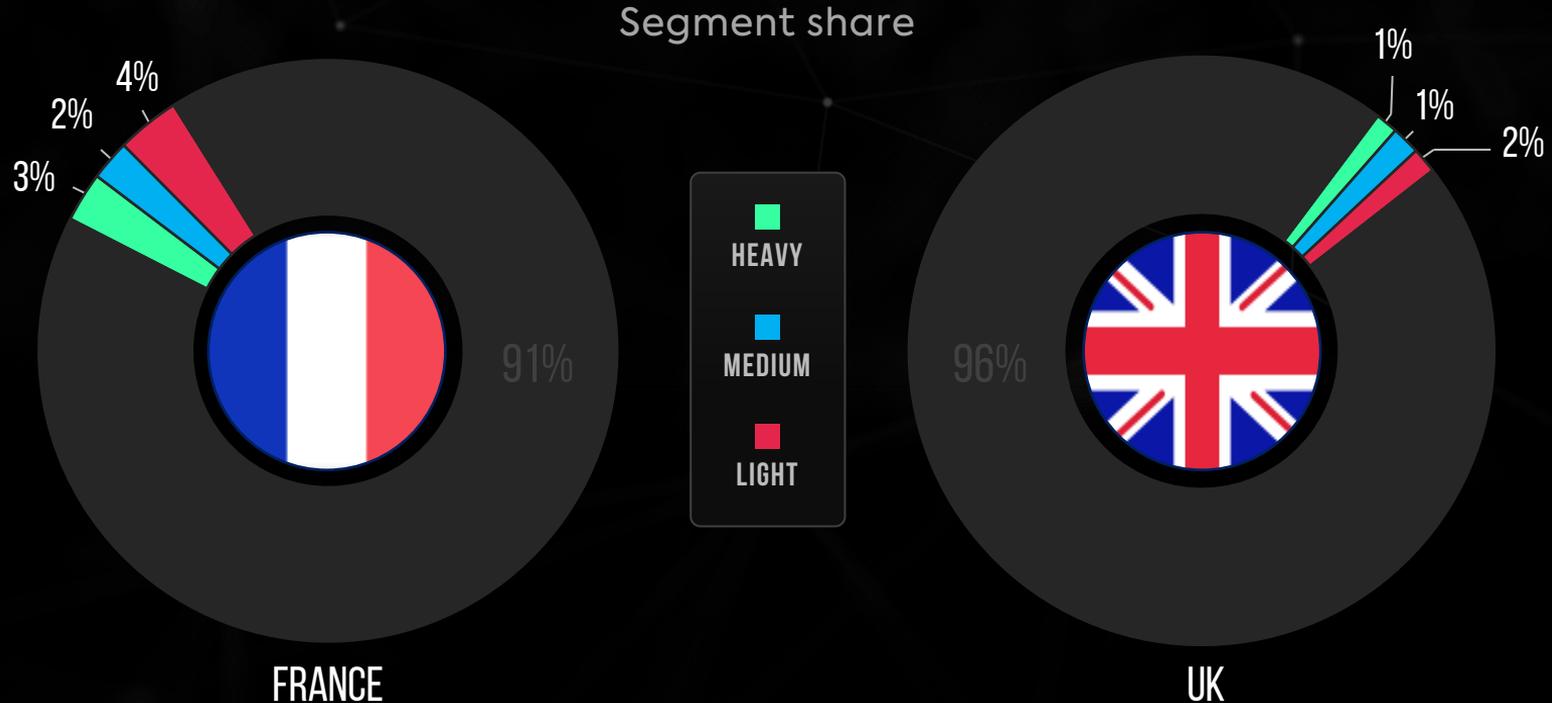
Anime content makes up between **15-50%** of overall consumption.

Light viewing households:

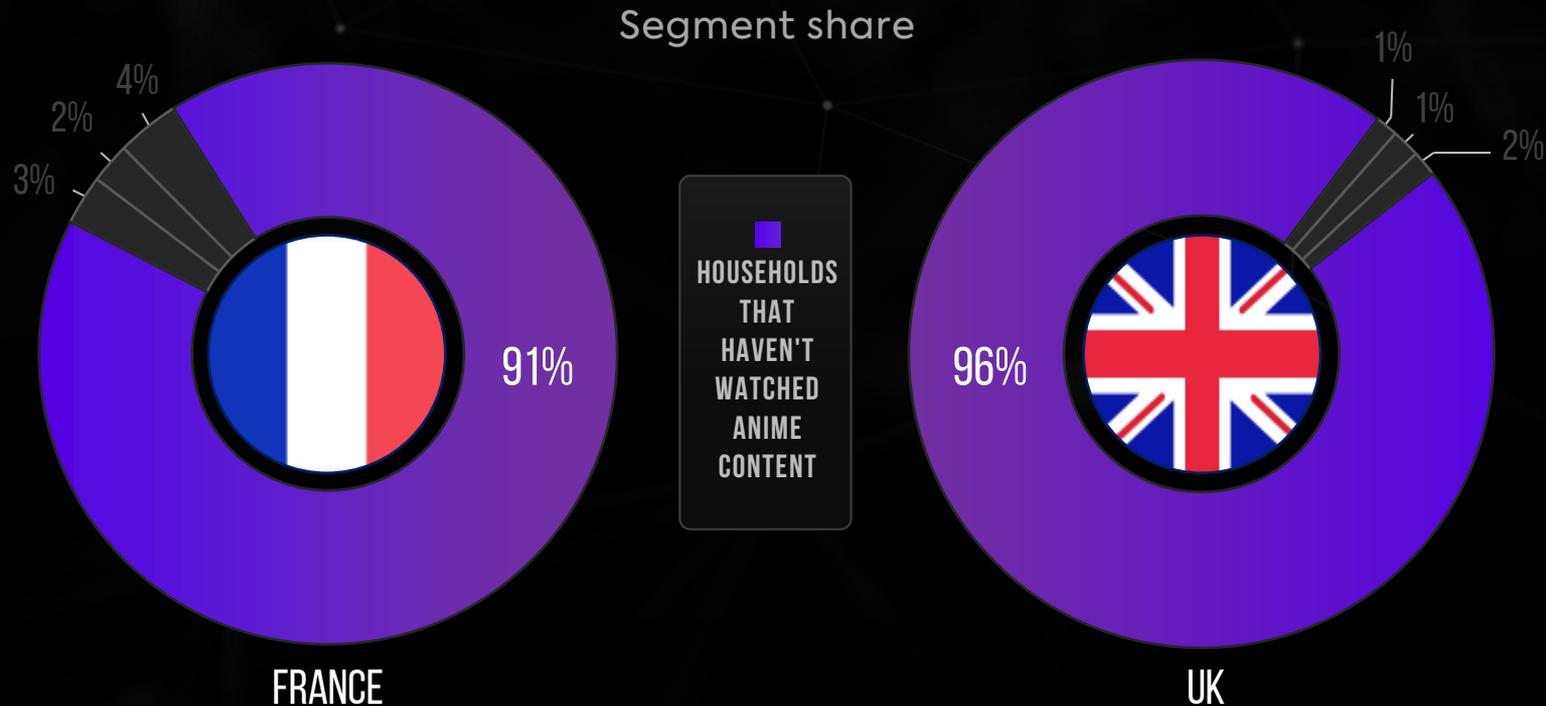
Anime content makes up between **1-15%** of overall consumption.



9% of households in France have consumed anime content vs. 4% in the UK



There is a huge opportunity for growth with those households that haven't engaged with Anime content



Heavy viewers of anime are also watching...



Light viewers of anime are also watching...





**THANK
YOU!**



www.parrotanalytics.com