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

- Creative Participation
- Active Consumption
- Deep Research
- Social Encouragement
- Public Posting
- Expressing an Opinion
- Subscribing to Updates
- Indicating Interest
- Passive Impressions

Demand System:

Weight of demand

Lower

Higher

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

Index

01-JAN-20  01-FEB-20  01-MAR-20  01-APR-20  01-MAY-20  01-JUN-20  01-JUL-20  01-AUG-20  01-SEP-20  01-OCT-20  01-NOV-20  01-DEC-20  01-JAN-21  01-FEB-21  01-MAR-21  01-APR-21  01-MAY-21  01-JUN-21  01-JUL-21  01-AUG-21  01-SEP-21  01-OCT-21  01-NOV-21  01-DEC-21

0  20  40  60  80  100  120  140  160  180  200  220

0  20  40  60  80  100  120  140  160  180  200  220

APR 20  Tower Of God
OCT 20  Jujutsu Kaisen
APR 21  Tokyo Revengers
SEPT 21  Star Wars - Visions
NOV 21  Arcane + Cowboy Bebop

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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.
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.

Platform share for Anime in 2021

- 35% Platform Share
- 2021
- MBS
- TOKYO MX
- Netflix
- Other (70+)
Unsurprisingly, Japanese networks **MBS & Tokyo MX** have been key growth drivers

Platform share for Anime in 2021

- **MBS**: 35%
- **Tokyo MX**: 6%
- **Netflix**: 7%
- **Other (70+)**: 0%
Netflix has contributed more than half the growth compared to 70+ other platforms.

Platform share for Anime in 2021

<table>
<thead>
<tr>
<th>Platform</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Netflix</td>
<td>35%</td>
</tr>
<tr>
<td>MBS</td>
<td>6%</td>
</tr>
<tr>
<td>Tokyo MX</td>
<td>7%</td>
</tr>
<tr>
<td>Other (70+)</td>
<td>8%</td>
</tr>
</tbody>
</table>

2021
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.
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.
Travelability of Anime
Japan is the primary producer of anime content

- **Japan**: 94%
- **United States**: 5%
- **Others**: 1%
France is the top European market

Top Markets by Average Demand in the year 2021

1. JP 2.67x GOOD
2. US 1.71x AVERAGE
3. PH 0.67x AVERAGE
4. FR 0.67x AVERAGE
5. DE 0.62x AVERAGE
6. BR 0.62x AVERAGE
7. CA 0.58x AVERAGE
8. CN 0.58x AVERAGE
9. RU 0.54x AVERAGE
10. GB 0.49x AVERAGE
## Top 10 anime shows globally

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

<table>
<thead>
<tr>
<th>RANK</th>
<th>TITLES</th>
<th>JAPAN</th>
<th>US</th>
<th>FRANCE</th>
<th>PHILIPPINES</th>
<th>BRAZIL</th>
<th>GERMANY</th>
<th>CANADA</th>
<th>CHINA</th>
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<tr>
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<td>Attack On Titan</td>
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<td>My Hero Academia</td>
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<td>6</td>
<td>44</td>
<td>73</td>
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</table>
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

- Romance
- Mystery
- Superhero
- Crime
- School-Kids
- Cartoon
- Sports
- Paranormal
- Family
- Children
- Music
- Educational
- Western
- War
- Varsity
- LGBTQI+
- Apocalyptic
- Short
- Suspense
- Neo-Noir
- Dystopian
Anime leans on a variety of genres to engage diverse audiences & cultures
We can cut demand for Anime content using the traditional classifications

- Seinen
- Shounen
- Shoujo
- Josei
- Kids
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

![Graph showing difference in audience demographic make-up for different genres: Anime Series, Superhero Series, Fantasy Drama, Crime Drama, Soap Opera. The graph indicates that Anime Series has a significant over-index in the Gen Z and Zennials segments, compared to the average audience.](image-url)
Understanding which titles resonate with the Above 40’s can help to serve the older demographic & grow overall reach.
The Anime audience skews predominantly male.
What learnings can we take from the more female skewing anime titles?

- **Fate/Stay Night: Unlimited Blade Works**
- **Fruits Basket**
- **Soreike! Anpanman**
- **Cowboy Bebop**
- **Dragon Ball Super**
- **Cybertron Trilogy**
Audience Segmentation
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…

- Escapist Content
- Historical Adventure
- Animated Comedy
- Animated Sitcom
- Superhero
- Sci-Fi Drama
- Story-telling
Light viewers of anime are also watching...

- Anodyne Content
- Romance Reality
- Sitcoms
- Comedy Drama
- Procedural Drama
THANK YOU!

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