

A Study on the Elements of Chinese Animation IP (Intellectual Property) Development Based on the Pan-Entertainment Industry

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Abstract

With the introduction of China's new policies, the Chinese animation industry has gradually formed a sustainable industrial structure chain, and the output value of the animation market is also in a state of continuous growth. . Since 2013, domestic animation has been developing from “lower age” to “ageing” and “adults”. At the same time, with the popularization of China's pan-entertainment industry model, the multi-domain symbiosis of the Internet and mobile Internet has been realized, creating a fan economy of star IP (Intellectual Property), and promoting the linkage of various industries under the same IP. This paper mainly analyzes the development of the animation IP market in China's pan-entertainment mode in recent years, and analyzes the cross-media operation mode of the animation industry. At the same time, it studies the application of self-media in animation.

Keywords: *Pan-Entertainment, Animation Industry, Animation IP (Intellectual Property).*

1. Introduction

1.1 The development status of Chinese animation

Since 2000, China's animation industry has experienced a period of rapid development from the growth stage. During this period, it experienced the transformation of the industrial model, and gradually changed from the animation OEM to the original direction. The popularity of mobile Internet devices such as smart phones, the efficient interaction and convenience of new media have changed people's consumption patterns and lifestyles, and the consumption structure has begun to tilt toward service and entertainment consumption, and has had a huge impact on the animation industry.

The development of the new media video platform has also boosted the development of the animation industry. The main sources of revenue for the online animation content market include content payment,

advertising, and derivative license fees. The cost of purchasing animations has been increased through various platforms. The platform broadcast greatly improved the user influence of the work.

The success of the animated film such as <Monkey King: The Hero> and <Little Door God>, the major mainstream video sites began to produce their own animation work¹⁷⁸. The novel IP adaptation animation, combined production of a lot of high-quality animation, such as <The King's Avatar>, <The Legend of Qin>, <Rakshasa Street>, <Fox Spirit Matchmaker>, <The Degenerate-Drawing JiangHu> and so on. At the same time, in this context, the cooperation between China and Japan in making animation has become one of the mainstream of Chinese animation development. Series such as <Cong Qian You Zuo Lingjianshan> and <The Outcast> series have developed into an attractive animation IP¹⁷⁸.

As shown in Tables 1 and 2, the scale of Chinese animation users is increasing year by year. Among them, the young group represented by the 90s is the main consumer group of animation works, with strong consumption awareness and purchasing ability. Based on the above situation, it is more acceptable to consume for animation.

Table 1. China Online Animation Content Market Revenue Structure 2015-2018

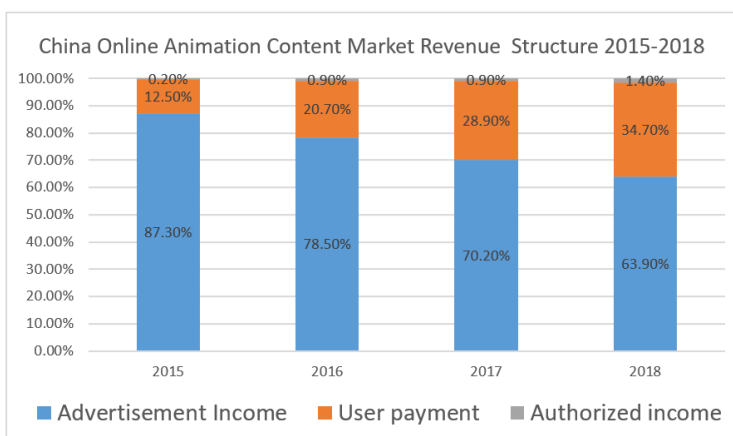
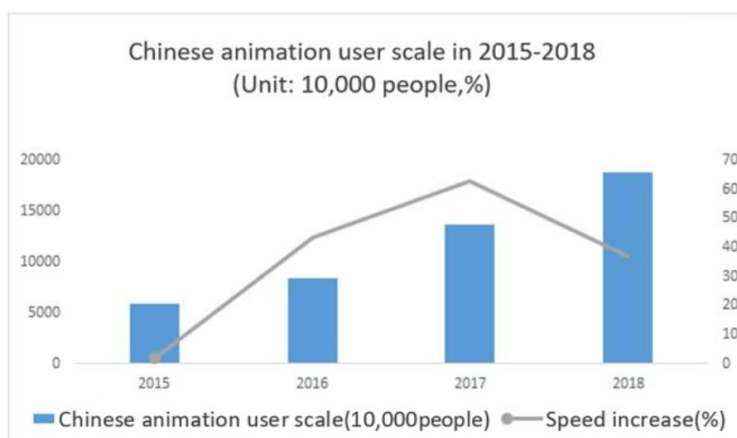


Table 2. Chinese animation user scale in 2015-2018



1.2 The impact of Chinese policies on the Chinese animation industry

In the 1990s, foreign animation foundry was also heavily integrated into the Chinese market. Its high production price led to a large number of animation workers entering the OEM industry, which led to a large

loss of talent in the animation industry. In order to support the development of the animation industry, since 2004, with the government's policy of promoting the development of the animation industry, we have vigorously supported domestic animation with tax incentives and subsidies, and continuously strengthened copyright protection. A large number of animation industry bases have been established throughout the country. The major "animation festivals" promote the development of the Chinese animation industry. The Chinese animation copyright market environment has been greatly improved.

Table 3. Relevant policies of the Chinese government on the animation industry in 2005-2018

Time	policy	related information
2005.5	《Specific Measures for Promoting the Development of Animation Creation in China》	Support for playing excellent domestic animation during prime time
2006.8	《Notice of the State Administration of Radio, Film and Television on Further Regulating the Management of TV Cartoons》	Standardize animation broadcast rules
2008.8	《Several opinions on supporting the development of China's animation industry》	Support original creation and improve the industrial chain
2012.6	《National animation industry development plan during the "12th five" period》	Improve the financing policies of the animation industry
2016.7	《Notice of Promoting the Entry of the Socialist Core Values Supporting Program》	Determine the project support plan
2017.2	《Cultural Development Reform Plan of the Ministry of Culture during the 13th Five-Year Plan Period》	Promote the marketization of key exhibitions
2018.5	《Notice on continuation of VAT policy for animation industry》	Improve tax policy for self-developed animation software

The "Internet +" policy was proposed in the government work report of the two national conferences. "Internet +" was listed by the government as an important policy for China's economic development. The government clearly proposed to formulate an "Internet +" action plan to promote mobile Internet, cloud computing, Big data and Internet of Things are combined with modern manufacturing to guide Internet companies to explore the international market¹⁷⁸.

With the promotion of various policies, many Internet companies have begun to cross-border other industries and integrate the Internet into traditional industries. Alibaba, the giant of Internet companies, launched Alibaba's literature, investing in various fields including ENLIGHT MEDIA, TTPOD, Xia Mi, Sheng Meng, Washu, Alibaba Pictures Group Limited and Youku Tudou Inc., Create a family digital entertainment ecosystem that includes film, animation, games, music, literature, education, and e-commerce.

1.3 Analyze the existing problems in Chinese animation market

Although China has a huge animation market for children's animation, the development of Chinese animation has not met the needs of the audience for many years, and has been in the state of inputting animation from foreign countries¹⁷⁸. The original animation industry has been in a downturn for a long time, and it is difficult to move forward even with the support of national policies. Many problems, such as weak original ability, simple story, and poor image quality, have resulted in a large number of animations but lack of high-

quality animation.

In China, animation is often used as a viewing service for children. Therefore, it is generally younger. Animated IPs such as "Happy Ocean and Big Big Wolf", although the ratings and box office are extremely high, they do not meet the needs of audiences of other ages. The result of low prevalence is the impression of most Chinese audiences on original domestic animation [178]. In the environment of slowing China's economic growth in 2015, China's animation industry has maintained a steady growth state, and from the mode of mass production to the mode of focusing on animation quality, the industrial structure has been continuously adjusted, and the model of brand operation has been around. The strength of the animation industry has been continuously enhanced, and animation has begun to develop from "lower age" to "aged" and "adult".

Many of China's animation IPs have a single value because they lack the values that carry the emotional needs of users and cause emotional resonance. On the one hand, the development of the animation industry chain is not mature enough; on the other hand, the follow-up development of China Animation IP lacks patience and planning, and has made great success in IP development, showing the phenomenon that IP adaptation is inconsistent with user needs. It has also been influenced by various factors affecting the development of animation IP, such as market environment, capital, originality and users.

Environmental issues: The domestic animation industry is affected by overseas markets. Due to the early development of the Japanese and American overseas animation market and the maturity of the industrial chain, the animation industry has long occupied the Chinese animation market.

Capital issues: The cost of animation production is high, and the animation work itself is difficult to achieve sufficient revenue and support the development of animation companies.

Original question: IP pan-entertainment and user payment are based on the boutique, but the number of domestic fine animations is small, the animation image is rarely impressive, and the original ability is weak.

Users: The user-paid market is still in the early stages of development, and Chinese animation still needs to consider diversified profit methods.

In the animation market, all kinds of content are competing for people's attention, but there are very few works that can be liked and remembered by the market, and the probability of original content becoming popular is extremely low. In order to solve the above-mentioned content problems, the development of animation IP is supported by policies and platforms. Investors and content creators are willing to use IP for derivative development of content, and will not hesitate to spend a lot of money to purchase IP.

The Internet is best at connecting everything. With the popularization of the mobile Internet, the threshold for people to obtain entertainment content has been lowered, and people can obtain the content they want to know through more channels. In the past, animation, games, movies, music, and novels were all independent industries, but through the development of a pan-entertainment industry model based on the Internet platform, all areas of the animation industry can be connected.

2. Analysis of the Value of Animation IP in Chinese Animation Industry in Pan-Entertainment Mode

Pan-entertainment refers to the multi-domain symbiosis of the Internet and mobile Internet to create a fan economy of star IP (intellectual property). The core is IP, which can be a story, a character, or any other thing

that a large number of users love , Based on the network platform, extend the value development of cultural products to animation, games, film and television, music, literature and life, etc., to create an ecosystem with the entire industry chain¹⁷⁸. This concept developed into an industry-recognized “one of the eight major trends in Internet development” in 2015.

The core of the pan-entertainment industry lies in the Internet-based communication channels and the excavation of the value of IP, reshaping and integrating the commercial value of IP in different fields. Therefore, the various fields of the industry are closely related and have obvious symbiotic relationships. Excellent animation IP has strong entertainment, strong values, easy to derive into multiple content forms, and strong intellectual property protection.

Excellent animation IP can derive new peripheral games and related novels and film and television works. The popularity of games can promote the development of the game video live broadcast industry. Novels and film and television works can attract a large number of fan groups. And such industrial integration and cooperation effects enable all branches of the industry to grow together.

Different forms of content can achieve synergies, continuously enrich IP content, enclose or even expand IP audiences, extend the vitality of IP, and continue to generate value. All fields can achieve win-win results through IP symbiosis.

The essence of the pan-entertainment industry is the extensive linkage and deep integration of multi-cultural entertainment formats such as online games, online movies, online animation, online literature, and online music. The interconnection between the formats, the symbiosis, and the formation of a network of value chains.

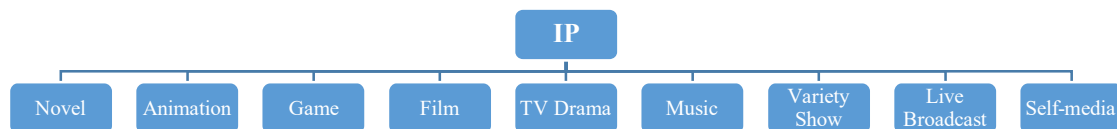
Based on the rapid development of the Internet, modern people are generally in a fast-paced lifestyle, and time has become very limited. How to effectively attract people's attention in a limited time and shorten the flow of cash flow, establish the influence of IP, and the quality of content. Sex and the persistence of its output are key.

2.1 Analysis of the value of the pan-entertainment mode for the animation industry

In 2017, China's pan-entertainment core industry reached 598.546 billion yuan, mainly due to the sub-sectors of animation, games, film and television¹⁷⁸.

"Internet + animation" multi-industry integration development is the main way of animation industry development nowadays. Animation and games, literature, film and television, education, music, toys, radio dramas and other industries work together to form an ecosystem of "pan-entertainment" culture industrialization [8]. Therefore, in the secondary industry chain, the forms of comics and novels have become diversified, and the links around content creation, communication, commercialization, online and offline activities are constantly changing.

Table 4. IP development scope under the pan-entertainment mode



IP belongs to the copyright category in the pan-entertainment industry. It is endowed with unique, beautiful and special attributes in the Internet era. In essence, it focuses on quickly grouping people and attracting people's attention to animation works under the attention economy mode [9]. Force, through the cultivation of potential consumer groups, thus achieving limited resources for competition. In 2016, at the second Tencent Animation Industry Cooperation Conference, the concept of the second yuan economy was summarized as: "Boutique animation content + Public innovation platform + Pan-entertainment symbiosis = star anime IP".

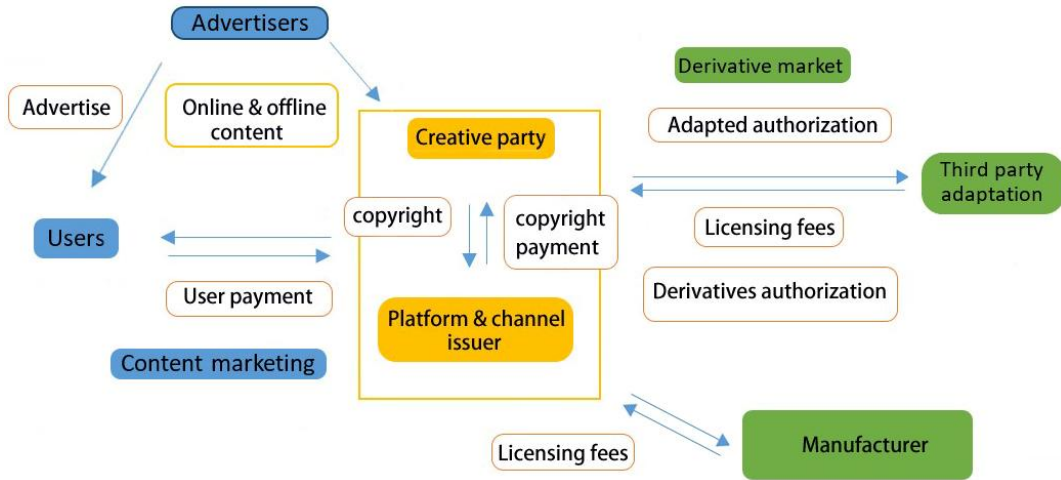
However, because the audience is prone to aesthetic fatigue and the demand for content is constantly changing, with the spread of webcasting and short video, the spread of the pan-entertainment industry is more abundant. The scale of Chinese animation users is increasing year by year. Among them, the young group represented by 90s is the main consumer group of animation works. It has strong consumer awareness and purchasing ability based on the above situation, and is more inclined to animation consumption.

2.2 Analysis on the influence of fan economy on animation IP in pan-entertainment mode

At this stage, the Chinese animation industry model is close to Japan's industrial model, but there are still some differences. Through the use of Internet comics, novels, games and other IP, the animation works can form a viewing consumer group at a lower cost based on the large fan base [10]. Adapted into an animated work, through the use of the Internet and multi-media platform to expand the influence of the entire IP, and then fan consumption to achieve cost recovery and expansion, and ultimately form a series of works or derivatives value-added [11]. Among them, the animation content broadcast - fans receive - content feedback process, will be derived from other areas, such as games, stage plays, music, peripheral products, animation exhibitions and so on. These processes will establish an IP identity and form an IP brand with a fixed community identity. At the same time, fans through the Bilibili and other cultural community sites to achieve fan-to-fan communication and secondary creation, allowing fans and authors to participate in the creation of works in different forms, to better grasp the user's preferences, is an important way to develop fan economy.

Most of the profits of the animation industry come from the derivative development of animation IP, the sales of life products such as toy hand-held products [12]. The construction and operation of theme parks is the main source of output value of animation industry, and the production and development of authorized animation derivative products is animation cost recovery. One of the main ways. From the perspective of business development, animation through the adaptation of comics, novels, movies, games, development of games, toys, peripheral products and other derivative products in the hands of developers in different fields at the same time, coordinated operation [13]. The extension of related products, the original content is adapted and re-marketed, and finally the commercial value of IP is realized through film and television box office and product sales [14].

Table 5. Research on the Adaptation Mode of Domestic Animation IP in Pan Entertainment Industry



As a typical youth subculture, animation has gradually strengthened the communication ability of young people. The open and inclusive culture at home and abroad, the animation elements are widely used in life, “selling Meng”, Cosplay, expressions, and barrage exchanges, etc. It is the performance of animation in life.

Table 6. Internet video platform popular film barrage exchange

Animation	Film	Popular creation video

Table 7. The types of popular emojis

Brand operation	Funny pictures and text	Network buzzwords

Animated IP needs to be verified by the market, recognized by value, and able to resonate with the user's emotions. At present, there are three main ways of Chinese animation IP conversion and value-added development:

Based on the IP developed by the Public Domain, through the adaptation of traditional literature, many classic animated characters like Journey to the West and the Romance of the Three Kingdoms are created [15]. For example, <Monkey King : The Hero>.

The original IP, from the production team from the script to the production of the animation works, and it is animated brand, extending the multi-chain industry chain of games, novels, comics, peripheral products. For

example, <The Degenerate-Drawing JiangHu >, 《Da Hu Fa》

Through the authorization of IP works such as popular comics, novels, and games with a large number of fan bases, the brand has attracted fans to spread and the profit model has become more diverse. For example, <The Outcast>, < Cong Qian You Zuo Lingjianshan >

3. Analysis of the Development of Animation Industry under the Pan-Entertainment Mode

-Taking the Chinese Animation Communication Platform as an Example

In 2011, with the concept of “pan-entertainment”, an industry chain based on the common development and integration of multiple fields based on the Internet and mobile networks was constructed, especially the integration of many cultural industries became the digital entertainment industry in China. With the development trend, many companies have developed pan-entertainment as a company strategy and began to develop exclusive IP.

3.1 Tencent interactive entertainment

Tencent has established a comprehensive interactive entertainment service brand, Tencent Interactive Entertainment, which includes Tencent Games, Tencent Literature (China Literature), Tencent Animation, Tencent Pictures and Tencent E-sports. Based on the initial development of the animation industry under the pan-entertainment mode, the popularity of the platform was enhanced by the introduction of the classic Japanese animation IP. Tencent Animation and Japan Jiyingsha have reached a large-scale copyright cooperation, introducing a number of popular animation works such as "Dragon Ball", "Naruto" and "One Piece", and then copyrighted rights on the Internet to make infringing works on other animation platforms in China.

Table 8. Tencent interactive entertainment



At the same time, Tencent has its own animation IP, which is submitted to the animation enthusiasts of all walks of life. Through the uploading of new works, monthly update number, monthly ticket ranking, editorial competition selection, etc., the authors can all be awarded by Tencent Animation. The bonus or signing up becomes an opportunity for professional cartoonists. In addition, comic works can be animated based on popular voting results. In 2016, the number one in the domestic network animation broadcast volume, < Fox Spirit Matchmaker > was animated by the first PV contest of Tencent Animation. The triple mechanism of bonuses, professional cartoonists, and animated works, the comics and novelists are included in the collection, ensuring the source of quality works.



Tencent Interactive Entertainment's own pan-entertainment business platform, together with QQ and WeChat's two local monopoly instant social software, provide more channels and channels for IP value derivatives to form an industry chain. At the same time, Tencent Animation cooperates with a number of broadcast platforms, major social media propaganda, pan-entertainment operators, and animation production companies to jointly create copyright industrial chains in comics, animation, games, literature, live-action movies, and offline activities.

3.2 Bilibili

Bilibili is a content community inspired by ACG (anime, comic and games) and is one of the most active secondary communities in China. Bilibili's high user traffic stems from its active community atmosphere and maintenance. As a community operator and manager, Bilibili filters the formal membership by passing exam questions to increase the barriers to joining the community. Professional User Generated Video, created by professional individual users, accounts for 89% of Bilibili's user views.

While providing the social services of the barrage and the UGC production service of the Uploader, the brand's influence gradually formed in the operation, and the independent brand was extended from the line to the offline, creating the summons of Bilibili Macro Link and Bilibili World. Animation offline activities.

Table 9. Bilibili offline activity

Offline activity	Bilibili Macro Link (BML)	Bilibili World (BW)
Picture		
Type	BML has become the most well-known offline activity in Chinese house culture.	Offline exhibition (Comic exhibition)
Exhibition Content	Bilibili Macro Link VR: Holographic projection concert Bilibili Macro Link SP: Japanese singer concert	Bilibili invites ACG-related writers' presentations, as well as Bilibili's popular Uploader.

In the field of secondary culture, the company has reached a cooperation with Tencent to jointly produce game animations. Station B undertakes the operation and distribution of the video platform, and the joint operation of the two parties covers copyright, declaration, derivatives, offline activities, games and other aspects.

4. Analysis of the Development Direction of Chinese Animation IP in Pan-Entertainment Mode

As an important field of the cultural industry, animation has magnified the value of IP and has increasingly

become the focus of the pan-entertainment strategy. At this stage, the business model of the Chinese animation industry is mainly to actively launch the user payment mode of animated content through the online video platform, and the user's willingness to purchase high-quality animation content is enhanced, which helps to directly generate revenue in the animation content. Animation is aimed at a wide range of young user groups, and will attract more advertisers as the number and quality of animations increase in both directions. A large user base is the basis for realizing the commercial value of IP. The creation and extension of IP is the operation process of attracting users, aggregating users and realizing cash.

In the investment standard of animation IP, we should pay attention to good story content and user base. By analyzing the animation products consumed by users and related data on social media, the corresponding evaluation strategies can be formulated in time to provide decision-making basis for the IP development process and avoid deviating from user needs.

In this process, the use of Internet thinking, emphasizing the user's central position, through crowdfunding and other means, encourage users to participate, forming a "fan" culture.

Using social media, online communities and other channels to establish a platform for sharing and sharing between users, these users are cultivated into this animated hobby group, because it contains user emotions and needs, common interests and recognition, culture accompanying growth, etc. Elements, this animation gradually formed an IP value.

In the field of animation, cross-media operations have a lot of room for development. The animation IP adaptation is not just to change the animation into derivative products such as movies or mobile games, but to focus on the information dissemination of different media, to think about the differences between various media and story expressions, and to use this difference to achieve different media. Effective communication, to meet user preferences under different media channels, to shape influential animation IP.

Animation products can directly benefit from other areas, such as the development of animation derivative products, IP-licensed development and cross-industry operations. Later derivative game production, animation development, animation professional exhibition, large-scale animation festival, etc., can expand the animation surrounding market and form a diversified industrial chain. But at the same time, we must pay attention to the development and utilization of IP, avoid over-exploitation, and protect the development potential of excellent IP.

5. Conclusion

The animation industry has become a cross-media and comprehensive industry, and the cooperation between multiple media has gradually become the trend of the development of the animation industry. With the advent of the IP linkage era, the cultural core of a single work can be precipitated and achieved through copyright cooperation. Enlarge the overall value of IP. To develop IP and amplify the value of revenue, it is more necessary to cooperate with multiple media in the industry chain. By using their respective advantages, selecting the appropriate IP development model, developing existing resources, and maximizing the value of IP revenue. The development of digital technology, the diversification of funds and the diversification of business operations are the conditions for IP cooperation, and copyright is the basis and guarantee of cooperation. The advantages of cooperation are that it can share original costs, can save marketing costs, can increase the predictability of profits, can enhance the effect of communication, can provide effective ideas and topics, and can cross-promotion to increase the overall benefits of the industry chain.

An animation IP that can stand firm in the animation market for a long time, from image design to story content, has made sufficient preparations in the early stage to carry the audience's cultural demands. Promoting the development of animation IP also requires the cooperation of many factors, such as the development of audiences' interest in animation, the market's emphasis on copyright awareness, and practitioners' pursuit of artistic innovation concepts. These all require long-term guidance and bring up. This article proposes optimization suggestions for some current problems, which have certain limitations, and further research and expansion are needed in the future.

In the Internet-based environment, the fan community plays an increasingly important role in all aspects of production, communication, and consumption, becoming "consumers of production, disseminators of consumption, and producers of dissemination". Animation IP has formed a fan group with a high degree of cohesion and loyalty through the Internet, and has become a content disseminator based on Internet communication. Therefore, building a community-centric pan-entertainment industry model has become the key. Only by realizing interactive value-added and a virtuous circle can the development of China's animation industry be promoted.

With the continuous injection of capital and the timeliness of the Internet communication itself, although the output of animation works is increasing, it is difficult for most creators to do more work on their works. This is also the acceleration of the overall pan-entertainment industry. The sequelae of development. Compared with Japan, the United States and other countries where the animation industry has developed more maturely, the output value of China's animation industry still has a lot of room for growth relative to its huge scale. The animation industry has great value in the development of IP derivatives, but most animation companies in China cannot form a complete industrial chain by relying solely on their own companies to derive and integrate operations like Disney. To develop IP and amplify the value of revenue, it is even more necessary to merge multiple companies in the industry chain, and use their respective advantages to select the appropriate IP development model, develop existing resources, and maximize the value of IP revenue. With the trend of globalization in all industries, through market integration and multicultural learning, I think this is an important part of the animation industry and even the digital content industry. China's animation industry is still in a difficult transition and development period, in the future global digital content market, I think the research and analysis of Chinese animation IP the demand of the market and the audience is necessary, so as to explore animation IP development operation mode which accords with the situation of China, hoping to provide reference value for the development of Chinese animation IP.

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