Indian Animation Industry: An Overview

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Abstract: The purpose of this research paper is to study the challenges and analyses the future growth opportunity of Indian animation industry. Even after having such a great talent and creativity in animation with great demand across the globe for outsourcing Indian Animation Industry is not able to leverage the global demand by engaging in self production and mostly handles outsourcing projects. The study uses both Primary and Secondary data. Online survey form is used to find out the demand for animation in the Indian market and to analyze the main challenges and problems that the animation industry is facing through an article, research papers, blogs including the interviews with animators.

Index Terms **- Animation, Self-production, India.**

Introduction

The demand and popularity of the animation industry are growing at a rapid rate of 16.4 percent across the globe. Majorly popular in the entertainment industry like anime series, animated movies, films, gaming sector. This industry targets all type of age group cartoons for 0 to14-year-old kids and anime series for all teenage and adult with mature content. This industry can have such a heavy demand in the market if the content has been created creatively. And with strong story content and amazing animation effect, the success of the animation industry is growing day by day. India is also contributing their talent in this industry but for other country. Even after having such a great opportunity in this industry what challenges Indian animation studios are facing. However, if Indian studio starts self-production what will be the possible opportunity this industry can have to create a new market in entertainment and spreading the richest and ancient culture with knowledge that India has throughout the globe and how strong an impact this industry can give on the Indian economy.

Literature Review

The very first animated movie was made by Dadasaheb Phalke with matchsticks, coins and stop motion camera techniques in late nineteenth century 1997. That was the starting of Indian Animation era. After Indian Animation Industry created a record of 1.2 billion by 2012, the 27% of rise since 2008. The major evolution in Animation Industry begins in 1950 when Clair Weeks, A Disney studio animation came to India to give training of classical animation. Then they started creating few films at that time but could not be succeeded and accepted due to lack of government and market support. The history of Indian Animation Industry has been full of struggles with a lot of ups and downs. And no doubt that is still struggling but the difference between in their struggle in past and struggle in present is that. In past audience where not aware about the animation so there was no demand at that time. But in present the audience are so aware about the content, storyline-up, animation quality that Indian animation Studios are not able to fill the gap between audience demand and supply of good content. But there are so many future opportunities to grab the market to start India's own self-production.

India always considers as the first choice by every company for service providing country in the Animation Industry. Because India has perfect man-power and quality of work at such a low cost to hire Indians for their own projects. According to an Article "the full animation film cost over $100 million in US but in India it cost $15 million to $25". Although the service providing and outsourcing the Indian talent is a good business with less risk and normal profit to survive. That's why India become the digital labor. Even after having the

ocean of talent, creativity and man-power. Other countries are using Indian talents to create their own successful story.

"Indian animation is finally ready, it just needs a little guidance" said by Alexander Fernandez, CEO of Streamline Studio, Amsterdam. Which is true enough Indian Animation is finally ready with their talent to showcase in award winning Animated movies and web series like Khaleesi's Dragon in Game of Thone created by Prana Studios in Mumbai with the hard work of 800 employees, then Disney film The Jungle book was done in Bengaluru office and that film won the Oscar for best Visual effect, next comes the tiger scenes in Life of PI was done in Mumbai and Hyderabad that movie won the Best Visual Effect Oscar in 2013, How to train your dragon, Skyfall, Shrek and list goes on outsourcing award winning work done by Indian talented artist and creators.

With such a great potential and talent to which whole world admire the most then why Indian animation scenario still struggling? Why the home content is so low quality and non-existent. Because "India wants to play safe they are not ready yet to take risk of self-production just to ensure high profit at minimum risk" according to article. And that's only allows them to survive in market starting self-production is a big step to take. But that's how every business work higher the risk higher the profit. And this are not the only reason there are more challenges that Indian Animation Industry is still struggling with.

I. CHALLENGES

• Lack of Imagination this is the biggest challenge in fount of Indian Animation Industry. They do not have any mature content for storyline-up to create any animation film or web series. Even they are having some home ground content just to target 0–14-year-old kids with no logic and sense at all in them they are just creating episodes with same base same content no intellectual level at all. And on the name of story, they only have Mahabharata and Ramayana by re-creating the same story like thousands of times nothing new or innovative.

• Lack of passion in the Hindu article, E. Suresh the founder of studio Eeksaurus describe the major problem with creating animation content is lack of passion out of 10,000 animators, we may have only 10 animation film makers who are passionate about making a film using the animation media. Being an animator is not an easy task and being passionate about it is way more difficult in India where they earn to survive their livelihood and becoming an animator means work pressure. Which brings the next point.

• Work pressure is the common term used in daily life but in life of animators this is terrible. First and foremost, Indian Animation Studio work for others (outsourcing) that means they have to complete their task to reach the dead line of the clines and time always in hurry for them. Then creating every single seen professionally with their hard work and giving extra time to it that makes them exhausted. And even after such a hard work there earing in low as compare the effort, they put in it. And due the all of this including many more factors they never able to enjoy their work and start losing the creativity and passion toward animation and being an animator.

In India animation is still considered as a children's medium of entertainment like cartoons. However, animation is powerful medium to attract and create demand for all type of age group even across the globe. The main problem of Indian Animation Industry is they are not looking out from the window for the demand of mature content. Even if they are creating it for kids there is no sense in their content and nothing through which kids can learn something. The super power of any animation have is targeting every type of audience and that's the biggest drawback for India towards self-production.

According to the "Indian Animation and VFX Industry analysis 2070-2030" article they mention that the animation and visual effects industry continues to acquire acceptance with Indian talent to compete with global counter parts and registering the CAGR of 15.5 in 2017 to reach a size of USD 0.91 billion, driven majorly by a 30% growth rate of 9%.

According to the report VFX is growing at 32% and animation at 9% this is because of number of production and promotion. Most of the producers are interested in making films using VFX with cameras which is the easiest way to create a film within 2-3 years with less amount of investment but in animation it took long time to complete the film with large amount of money too. And that's the main reason in difference between VFX and Animation production.

IV. RESULTS AND DISCUSSION

After studying all the problems and challenges that Indian animation industry is facing including all the possible progress and growth it made in past years. Including the remarkable talent and market of animation Industry in India.

The method that was used to collect data for this research was quantitative data along with the qualitative data which is mix data combination of both. The collected data contain both primary and secondary information. To find out the opportunity of this Industry in market it was important to have numerical explanation. In the process of collecting data there was ethical and philosophical consideration that the public where honest about their reviews with their own choices and preference not in any kind of manipulations.

We performed survey to collect quantitative primary data through questionnaire. Which was created in Google Form online. By keeping in mind that while filling the form it won't took much time of the person for that we used multiple choice questions for quantity, agreement and likelihood. With open-ended questions to get their reviews. This survey was conducted on online platform through sharing the link of google form on different social media platform and floating the form online to resave more data.

Secondly, we used qualitative method through secondary data in a form of Interview video of graphic designer's interviewed by someone else available online on YouTube. To gain more knowledge on the topic. We also used different case study to analyze and compare with Indian Animation Industry's as well as to find out the future opportunity. That case study was based on Japan animation during COVID-19, Shutting down of Animex channel on Indian TV and Animation movie created by Indian studio.

4.1 Method and analysis

While performing the questionnaire for quantitative research. The data was checked for missing data and outlies. The interviews were transcribed and thematic analysis. This involves coding all the data before identifying and reviewing. Each theme was examined to gain an understanding of participant, preparation and motivation.

The main reason of choosing this methodology is to find real-time situation and behavior to figure out the demand and to take measures for that demand. While doing the study and research on future opportunity the mixed research considers to be the best method because through quantitative it provides real-time data on demand and on other hand qualitative provides the personal beliefs and preference with life experiences with examples.

As the survey was conducted on the bases of choices and preferences of public on animation this collected data gives the new information and knowledge regarding the topic. And also explore the experiences of professional people who have given their time and talent in this field.

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Data Analysis and interpretations

To analyze the business opportunity of Animation industry in India it was important to have the reviews and thoughts of Indians on Indian animation that's where our quantitative primary data helped through questionnaire from which the data was cleared to analyze and interpret. According to received data there are 69.8% of people who prefer watching Anime while remaining 30.2% prefer web series over animates movies or series which shows the demand of animation in India which conforms about the awareness of audiences in animation. And according to data there are 23.3% of people who watch 4-6 anime series in a month, 27.9% of people watch more than 5 shows in a single month, and   watch 1-3 shows in a month. Here, we can say that even if people are watching more than 4 shows in a month the demand is very much clear and even out of all
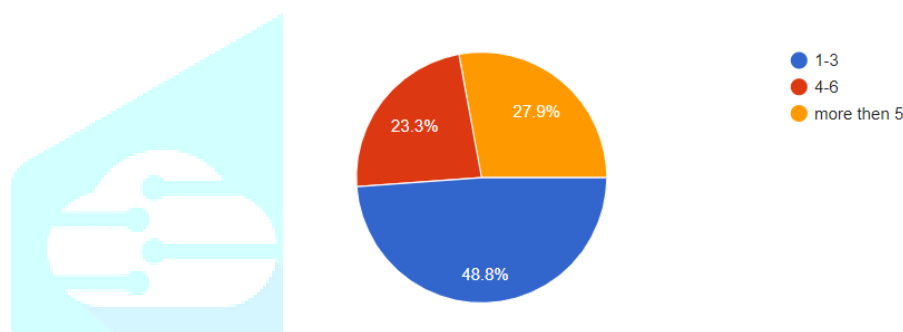
this people there are 40.5% of them who have Netflix subscription. Meaning is even if the Television channels do not support animated shows there are other platforms like Netflix where they can find demand and viewers for their content. Through this we can say that demand of animated shows in India is very much higher than expectation. If we talk about the scenario of self-production, it is important to know why Indians don't like their home content. This is the result which was so predictable for Indian animation industry.

Lack of original ideas, bad animation, boring story content and 60% of people consider all of this reasons to hate Indian animated shows. Then what can be the possible solutions for this this first of all lack of original ideas. Now seeing the current situation of Indian writers, it will be hard to create any good and unique anime show and on other hand Indian creators are too interested in recreating Indian mythology but the problem is they use same story just copy and paste which is boring. But as we all know how strong, ancient, and knowledgeable Indian mythology is and animation can be the great opportunity to spread it across the world.
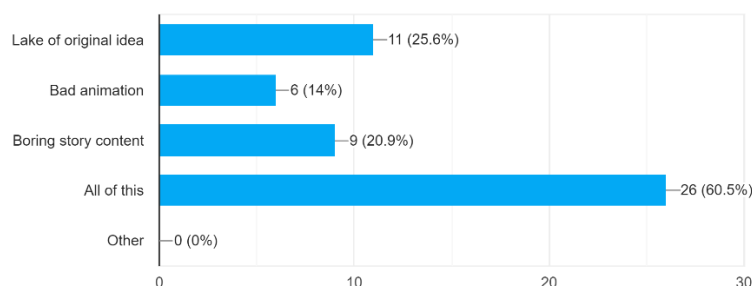
And according to survey there are 74.4% of people who agreed to spread Indian mythological and ancient characters like Ashoka, Buddha, Krishna and so many more through animation show across the globe but with new story content little fictional but with same characteristic and their ideals and knowledge it will automatically spread the culture of India in interesting content. The possible result will be attracting tourism from all over the world and explore more about India.

Secondly, the bad animation it's not like Indian artist are not talented we have discussed about the what level of animation Indian studio can do but when it comes to self-production the main problem is funding. But according to our data people do watch anime who have low quality but with great story content. Now, hear content is a key to success there are 72% of population can watch show in low quality of animation with it should have good story content.

On what basis you judge any kind of animated series?
43 responses
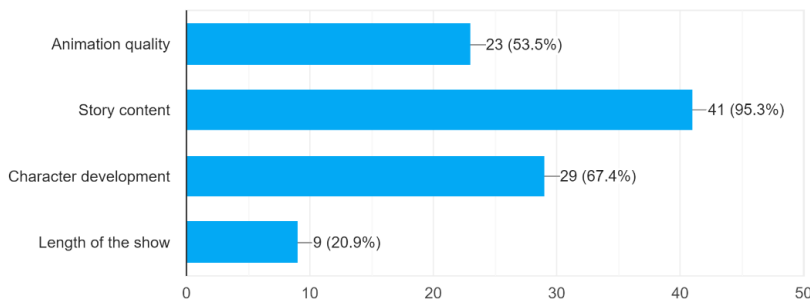
This are the results 95% of people judge and rate any animated show on the basis of story content and 67% on character development in which Indians are not good at. Because there are 81% of people who felt so connected with anime characters with their ideology and their thoughts at the level that they sometime start acting like that anime character. And for all of those people anime is not only an entertainment source it's a feeling for them an experience to escape the reality.

II. CONCLUSIONS

If India as an independent country started creating the high-quality animation production company officially the possible opportunity that India will have. According to Statista web site right now the worldwide market of animation industry revenue is $270 billion and, in this India, have only 10% of share in this. If Indian animation start targeting to spread Indian culture through animation in upcoming 10 years and evolve according to the market the popularity of India will increase accordingly which increase reach and ultimately more profit. When foreign audience start spending their money to watch Indian anime the foreign funds start increasing, with tourism and increasing fame and the number of Indian studios will also increase. And when the high standard animation studio start increasing it will create more job opportunities. By watching the current demand of animation in market and the talent of India the it can be the great chance to increase Indian economy by self-production.

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