Research on the Sustainable Development of Animation Industry Cluster Based on Diamond Model

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Abstract. China’s animation industry has developed rapidly, and has achieved commendable achievements in the cluster development strategy, but compared with the United States, Japan, South Korea and other animation power, there is still a big gap in the influence, sustainable development advantages and many other aspects. It is the urgent that animation industry cluster to gain an advantage for sustainable development. This paper based on Diamond Model, take the analysis of various elements of the development of animation industry cluster, explore strategies of the sustainable development of the animation industry cluster, and provide a beneficial reference for the sustainable development of China’s animation industry cluster.

Introduction

Animation industry as one of the emerging cultural and creative industries in 21st Century, with the important characteristics of low carbon green, high added value increasing employment, expanding domestic demand, and the unique advantage of sustainable, is to accelerate the transformation of economic development and an important gripper to promote the strategic adjustment on economic structure. China’s animation industry has initially formed an integrated system involving in creativity, research and development, production, processing, publishing, distribution, education and training, broadcast and derivative product development. But there is still a wide gap compared with the United States, Japan, South Korea and other animation power, which still exists a shortage of funds, lacks of animation talents, lacks of creativity and other issues. On this condition, how to take further development for China’s animation industry cluster, and to improve the sustainable development of the animation industry cluster advantage become an urgent issue to be solved. In view of this, this study based on Porter’s Diamond Model of industrial cluster competitiveness of research, analysis of various factors for the sustainable development of China’s animation industry cluster, put forward the countermeasures for the sustainable development of animation industry cluster in our country, in order to guide China’s animation industry clusters exert their inherent advantages, seize the opportunity to learn from each other, so as to realize the sustainable development of the animation industry cluster.

The sustainable development of animation industry cluster

The traditional mode of economic development in China is at the expense of too much consumption of resources and pollution of the environment. In the knowledge economy period, human capital, knowledge and creativity become the source of wealth growth and economic progress. The development of animation industry depends on the cultural and creative resources, can continue to use repeatedly, during usage, the continuous digging of cultural resources and human creativity will not decrease with the increase of production, but will be more abundant with the production, and can reduce the economic growth pressure on natural resources and ecological environment protection, which is in accordance with the requirements of sustainable development in the era of knowledge economy. Therefore, the animation industry is such an industry, which has the potential of sustainable development.
Animation industry is such an industry, which has the potential of sustainable development, the formation of industrial cluster also has the same characteristic of sustainable development. The animation industry cluster’s sustainable development has performance for: the relationship among the members in the industrial cluster is becoming increasingly closely, the competitive advantage in the related industries can be maintained for a long time.

Analysis of sustainable development of animation industry cluster based on Diamond Model

Animation industry is different from the traditional industries, with significant industry characteristics, completely copy Poter’s Diamond Model to analyze the sustainable development of the animation industry is clearly inappropriate. This paper analyzes the sustainable development of the animation industry cluster from four basic elements and two auxiliary factors, based on Diamond Model.

Production Factors Analysis

**Capital element**

Capital is the most direct driving force to the development of animation industry, our country to build high R & D capability and independent brand animation industry, needs strong financial support, to compete with foreign products, occupy a place in the domestic market, and then consider to enter foreign markets.

Presently, shortage of funds has become an important bottleneck which constrains China’s animation industry. Most of the domestic animation enterprise registered capital is not strong, which directly affects the animation brand licensing, derivatives and other normal operation of the business, or even stagnation.

**Innovation ability**

As a creative industry, creativity is the soul of the animation industry. The significance of innovation is far greater than any traditional industry, innovation can improve the product differentiation, so that the product can cause the consumer’s preference.

China’s real situation is: differentiation competition is not the main strategy of the animation enterprise competition, innovation has not become the key factor of the animation enterprise to obtain the core competitiveness. In 2014, the total output value of China’s animation industry exceeded 100 billion yuan, but a considerable part of the processing fees paid by foreign animation companies, the vast majority of animation production companies are relying on others to do the wedding dress to earn low manufacture cost, this can only make China become the world animation powerful processing base, hinder the sustainable development of China’s animation industry.

Demand Condition Analysis

**Macroeconomic structure**

China’s sustained and rapid development of economy and the Continuous enhancement of national financial strength are providing a good market background and development opportunities. Throughout 2010 - 2014 within five years, GDP and industrial added value of the three cases can be seen:

GDP in 2010-2014, respectively: 408903.0, 484123.5, 534123.0, 588018.8, 6362138.7 (100 million yuan), year-on-year growth rate, respectively: 10.3%, 9.20%, 7.80%, 7.70%, 7.4%. As shown in figure 1.
The added value of the three major industries in 2010-2014 showed a trend of increased year by year, the added value of animation industry which belongs to the third industry is the largest. As shown in figure 2.

Structure of income distribution

Urban residents’ per capita living consumption expenditure of 8 major categories show a comprehensive growth trend in 2014, compared with 2013, food, clothing, housing, supplies and services, transportation and communication, education and cultural entertainment, health care and other products and services spending have grown by 8.8%, 5.9%, 13.2%, 0.9%, 15.4%, 13.4%, 2.5%, 3.3%, respectively, the per capita spending of education and cultural entertainment is growing include the data, as 13.4%, as shown in figure 3.
Analysis of the Related and Supporting Industries

The derivatives industry

Animation industry, 70% of the profit is realized through derivative products, derivatives is an important part of the animation industry chain, the upper reaches is animation creation and downstream is animation manufacture, play a role of connecting link in the animation industry chain. At present, some outstanding animation companies in our country still exist some problems, for example, dericatives market, positioning fuzzy, industry chain is not perfect and so on.

Intermediary institutions within clusters

Intermediary institutions in animation industry mainly refer to institutions of higher learning and animation association, etc. The improvement of cluster agency will provide high quality labor force and industry information consultation for the animation industry cluster. Colleges and universities bear the “scientific research”, “talent cultivation”, “cultural heritage” of the major tasks, services for the sustainable development of animation industry cluster is the responsibility of colleges and universities. Animation Association can carry out all-round anime academic exchanges, set up professional cartoon industry websites, to provide the latest industry trends and market information for the enterprises in the cluster.

Enterprise Strategy, Structure and Competition Analysis

Market strategy

Brand strategy is an important component of the animation enterprise marketing strategy. China’s animation industry is experiencing a process from quantitative change to qualitative change, brand strategy will become the inevitable animation industry development.

Competition and cooperation between enterprises in the cluster

On the one hand, the competition between enterprises in the cluster, conducive to form the benignity competitive system in enterprise interior, which strengthens the competitive advantages of clusters on the other hand, between enterprises within a cluster through joint marketing, integration of resources, technical innovation and other ways to cooperate, contribute to the development of animation industry cluster.

Domestic animation industry clusters in some areas exist the phenomenon of excessive internal competition, and characterized by the following characteristics: low price competition, market fraud, similar products, etc.

The Government Factor Analysis

The supply of public goods

Public infrastructure and services within the animation industry cluster more perfect, the higher the quality, the more enterprises and talents they can attract into the cluster, so as to inject new vitality for the cluster.

From the domestic present situation, the supply of public goods is still an important factor restricting the development of animation industry cluster.

Opportunity Factor Analysis

The new media era

New media era provides diversified channels for the animation, such as, the mobile Internet, tablet PCs, mobile phones and other client focus. Interactivity and convenience of the new media not only changed people’s way of life and work, but also give birth to the revolution of both animation enterprise structure and bring a good opportunity for the development of animation companies.
Strategies for the Sustainable Development of Animation Industry Cluster

Create a good investment and financing environment for the industry development

Firstly, it should build the perfect animation industry capital investment security system, set up special animation industry financing guarantee agencies.
Secondly, government moderately relaxing animation industry capital investment policies, broaden the investment channels and improve the mechanism of capital operation, to attract private capital and foreign capital flows to animation industry.

Support the original

Firstly, further promote the creation of animation content. Encourage to support all kinds of animation creation, Promote and disseminate o full of Chinese culture and characteristics of the times of animation products.
Secondly, cultivate a group of professional and strong animation enterprise with vigor and vitality, also, breed a number of self-owned animation brands with international influence, to improve China’s soft power.

The role of government

Firstly, create a complete supply of public goods. To begin with, the government should strengthen the supply of transportation, housing, health care, education and other infrastructure facilities in the animation industry cluster. At the same time, the government should actively set up public training institutions for the enterprises in the cluster, so as to provide convenience for the animation enterprise to select the appropriate animation talents.
Secondly, promote cooperation and competition within the cluster. The government should actively build a perfect industrial division of labor cooperation system, strengthen the competition and cooperation relations between the enterprises in the cluster, by cultivating mutual trust and the concept of win-win cooperation to create the good conditions for the collaboration between enterprises in the cluster.

References