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主 催：モーション・ピクチャー・アソシエーション（MPA）

日本国際映画著作権協会（JIMCA）

共 催：公益財団法人ユニジャパン

後 援：米国大使館

一般社団法人映画産業団体連合会

■講演 2

Mr. Tim Anderson

Co-Founder & Managing Director, Madman Entertainment

Good afternoon, everybody. As per the introduction, I'm Tim Anderson from Madman Entertainment in Australia. We're only a small country but I'm happy to be here today to share a little bit of information about our actions. My perspective is that of a company that has for the last 22 years been working very hard to promote Japanese animation and related contents in Australia. I hope you enjoy.

Madman first began in Australia in 1996, 22 years ago, releasing a few VHS tapes, if anyone remembers those into a very small market. Japanese animation had begun to grow in awareness in the west mainly through the influence of television broadcasts through the 1970s and 1980s, such as Astro Boy or Tetsuwan Atom, Star Blazers, Space Battleship Yamato, and Robotech, which was from super dimensional fortress Macross. These particular shows were a very big influence on me as a young person in Australia.

Piracy was not very common in Australia back then, except for maybe a

small number of fan-subtitled VHS tapes traded by mail between members of fan clubs, which some might argue helped build awareness for animation, with Japanese animation in the west and begin to lay a foundation for a demand for anime products.

Madman rapidly grew thank to the introduction of DVD and home entertainment. Sales boomed as a result from around the year 2000.

Now, Madman releases around 200 anime DVD and Blu-Ray products each year. Sales can range from a few hundred copies of smaller, niche titles to high thousands for strong, franchised titles and tens or even hundreds of thousand for breakout anime film successes. We've worked hard in Australia over 22 years to build a DVD and Blu-ray market share in anime of around 90% that we're very proud of.

Madman represents a very broad range of anime content, from mainstream title to niche Otaku-style titles. We work with many Japanese companies, including companies like Studio Ghibli, Kodansha, Bandai, Aniplex, TV Tokyo, Toei, Kadokawa, Toho, Pierrot, TBS and many, many more.

Over time, Madman's anime product offering has grown and we have leveraged our market position in home entertainment to diversify and grow into various other areas of anime. Now, Madman considers ourselves to be specialized anime lifestyle company aiming to represent anything anime to the Australian market.

In theatrical cinema releases, Madman released around 10 anime theatrical titles per year. Our favored strategy is a rapid speed-to-market approach releasing very soon after the Japanese domestic release and

there are two main reasons we do this. One is to capitalize on the global awareness via internet and social media or SNS. Serious western anime fans today follow and share news directly out of Japan. Before ubiquitous internet, western licensees marketed and released films a year or more after Japanese release.

The second reason for a high speed-to-market approach is, of course, piracy. A film runs risk of major damage if it is no longer a special event or is highly desirable owing to cam rips or perhaps Blu-Ray rips having been available on file-sharing sites online. Our observation is that this damages the potential for the titles in our market.

For your interest, recent major successes for Madman in the theatrical market include the films Your Name and Dragon Ball Z: Resurrection 'F', which grossed 1.4 million and 1.72 million respectively, which for a small market like Australia is a very, very impressive result.

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Japanese animation content in Australia is becoming more and more successful.

On television, outside of major kid's franchises such as Pokémon, broadcast sales for anime is not particularly common. Although, we typically include a couple of terrestrial broadcast deals each year with our primary goal to grow awareness of anime and attract new fans to the genre through terrestrial television exposure. Madman's terrestrial deal for Evangelion in 1998, we believe, was a pivotal moment in growing awareness of anime to the Australian fans in Australia.

In the digital market, the market can be broadly split into transactional digital, so download to buy or download to rent and subscription video-on-demand or advertising-supported video-on-demand. Transactional digital is a relatively small market for anime in Australia and is dominated by recent theatrical titles along with a handful of major anime franchises.

I believe that easy access to anime piracy along with strong offerings on SVOD are the main reasons that episodic anime series are not generally successful in the transactional digital area.

As in other countries, there has been a significant growth and focus in anime in the SVOD space. Netflix, Crunchyroll, Amazon, and Funimation now have all become available with anime offerings in Australia in recent months or years.

One of Australia's leading anime VOD services is AnimeLab. This platform was developed by Madman. The platform offers a free AVOD service and an SVOD service with a mix of current season simulcasts, back catalogue and select feature films and is available on iOS, Android, popular game platforms, smart TVs and other popular devices.

We have seen remarkable growth for this platform since launch in May 2014, recently reaching a milestone of 1 million registered users for our AVOD service, which is remarkable for a small country like Australia and more than 55,000 users for our premium paid SVOD service. We see compelling VOD platforms such as AnimeLab with a high focus on user experience, a great range of titles and reasonable prices as an essential component to help combat piracy by providing a legal alternative.

In order to better provide the growing community of anime fans with other experiences and products, in 2016, Madman commenced a national program of anime festivals, now attracting around 30,000 people annually and growing rapidly. The events feature special guests from Japan and the USA, premier screenings, special event, cosplay competitions, merchandise sales and much more. I'm sure many of you have been to Comiket or similar festivals in Japan and this is similar in Australia but maybe on a smaller scale.

Madman also sells manga and a limited range of anime merchandise directly to consumers online and through our events.

It's well-known that the DVD and general physical market is in decline. In Australia, this decline commenced around 2010. Most believe the significant cause of this was a rapid rise of broadband internet access and piracy during the same period, along with additional impact from general media fragmentation and digital offerings expanding consumer choice.

Brett maybe horrified at my use of statistics but I've basically overlaid the Australian DVD market decline with a file-sharing study that was done in Europe around the same time to illustrate the point that my belief is that file sharing online has a very significant link with the decline in the physical market over time.

Another interesting statistic from my perspective, on one hand we believe piracy has significantly impacted and reduced DVD sales (00:10:00) perhaps worldwide and Madman's DVD sales, while at the same time we've seen awareness of anime grow every year.

We have observed attendance at anime fan conventions in particular

grow year on year for quite some time and we can see here the growth in a well-known US convention, Anime Expo, which is continuous and very, very large. I've also met with distributors from other territories, particularly some European markets who report small and very difficult—small markets for anime and very, very difficult conditions for anime sales, yet the same markets attract tens or even hundreds of thousands of fans to conventions, with many fans cosplaying as characters that have never received commercial releases. It seems that piracy must be one of the likely explanations for this.

As a result of this growth in anime awareness, even while DVD sales have reduced, Madman has introduced new lines of business, such as our anime events, our theatrical business, merchandise businesses to combat the decline in DVD sales. In addition, we've created our SVOD service, AnimeLab, to compete with this piracy and provide an alternative.

Madman's strategy to combat piracy can be put quite simply, we attempt to reduce or prevent access to pirate sites. We aim to provide compelling legal alternative to piracies such as AnimeLab, with a fantastic user experience, with great content, a great range of content and with affordable pricing. We positively encourage fans to support legal streaming.

In July this year, Madman joined with the Motion Picture Association and other parties in Australia to launch the largest action ever for site blocking in Australia, targeting blocks of 77 sites, 151 demands, including a large list of anime piracy site. And I'm pleased to hear that this strategy seems to be right. Large list. We're doing what Brett said is a good idea.

The action has been enabled through the Australian government legislation passed I think in mid-to-late 2015. Under the changes to copyright law introduced by this legislation, copyright owners such as Madman and member of the MPA are able to apply for a federal court injunction that requires an internet service provider, ISP, to take reasonable steps to block its subscriber's access to piracy-linked websites.

Initially, opponents of the legislation argued that this legislation may be abused or break the internet, while others argues that working around site blocking using VPNs would be a simple matter for most people and therefore site blocking would be ineffective. In each case, I believe they have been proven wrong.

Rather than site blocking legislation being abused, for the past number of years in Australia, the checks and balances of a healthy legal system have ensured a robust process, which targets only sites whose main purpose is to facilitate copyright infringement. Concerns about breaking the internet or massive compliance cost to ISPs have proven wrong, with IP blocking of sites now a relatively simple and inexpensive matter of process.

Although, VPN are not overly difficult to implement, to work around site blocking, results show that site blocking has nonetheless effectively deterred a high proportion of casual copyright infringes, whether through the added complexity, through the inconvenience or perhaps just highlighting the feeling of wrong doing that visiting a pirate site and learning that you need to use a VPN to continue the process.

The legislation introduced in Australia has enabled five industry-led federal court actions today, all successful, resulting in 82 sites blocked to

date, with research suggesting at least a 69% reduction in page views on the blocked sites as a result and an overall decrease in piracy since October 2017 of 25%.

At present, we hope and expect our current action to be finalized and implemented with sites being blocked prior to the end of this calendar year. In terms of measurable impact on legitimate sites, Madman believes there will be a measurable and sustained impact on our business.

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Particularly, our AnimeLab VOD platform and actually, I was again talking to Brett before, I think Madman is a unique position and that we will have immediate access to not only know when the piracy action occurs but also to see the immediate impact because we also operate a VOD platform.

I'd like to illustrate my belief that site blocking will have a significant effect on AnimeLab by sharing a piece of information that my team discovered some time ago. Some of you may be aware of the infamous piracy site, KissAnime, which is very famous and popular outside of Japan. In December 2015, this site went offline completely for 2 weeks as a result of a technical fault. During this time, content streams on AnimeLab, our site, increased by 250%. Our team was stunned.

I think if we collectively want to understand the possible impact of some of these piracy sites, the fact that with no action, a simple site failure of a piracy site, resulted in Madman's website growing by 250% in 2 weeks is astonishing information. Of course, KissAnime eventually restored their server and you can see the results. The streams of AnimeLab dropped

down significantly. I believe we retained some of those users, which was great, but of course our battle continues.

Sadly, site blocking may be not as effective as a failed server and maybe not as dramatic because perhaps some users will continue to VPN in, but these results do show that we can expect a meaningful increase in our site as a result of our participation in the site blocking.

My view, personal view, as a distributor of anime in the international market is that site blocking is an essential and valuable tool in the fight against piracy, especially when paired with strong alternatives to piracy such as a VOD service with a large range of titles, great user experience and affordable price options. We need to continue to maintain the site blocking process as new domains and proxies may emerge to take the place of blocked sites.

In addition we need to build upon this work by ensuring and perhaps working with search engines such as Google to not make it easy for consumers to find these sites or to find new piracy sites. And I believe that for many countries to follow this example, substantial additional revenue will be delivered to support the Japanese anime and manga industries, resulting in more investment into production further benefiting all parties, Japan and also international distributors such as Madman. I encourage all of you, I encourage the Japanese government and the industry to lead the world by your example in this area and offer the same degree of protection to anime and Manga intellectual property as is offered to other important law enforcement issues in society.

Thank you very much.