

Project: Japanese films and television programs in Europe: Former popularity, current decline, and the quest for new marketing strategies (1951-2018)

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Results

Over the course of the interviews and overall fieldwork that I could conduct in Japan and Europe, I could retrieve — as I was almost sure of in the first place, given the relevance of the interviewees — important information and insight on the negotiation dynamics between European and Japanese dealers/traders: insight and information that were, often times, counterintuitive; that is, not simply foreseeable and even very different from previous knowledge. Such dynamics in fact are not often well known, nor are they so obvious: several intercultural factors were and are at play that made the success, or at times the failure, of Japanese TV programs in Europe, with particular reference to animated series/movies. It was of utmost importance, for instance, to compare the story of a country like the UK, where Japanese TV programs are virtually unknown, to that of countries like France, Italy and Spain, where they have a history of success since the mid-1970s. My analysis, therefore, has been proceeding and it still proceeding in two directions: interviews at Japanese companies (mainly animation studios and major holdings) and interviews at European companies (national and local broadcasters, syndicate agencies, manga- and home-video publishers, internet providers of videos-on-demand or VOD). I use the present and not the past form because, although this is a Final Report, it has to be remembered that I am currently conducting the Phase 2 of this very project, thanks to the release of a second Research Grant by the HBF and by the TIFO for 2018-19.

Besides the aspects of pure discovery that emerged in the substantial amount of my international fieldwork, the other main part of this research has been the organisation of venues for personal and collective reflection, as benchmarks for the whole project and as future projections for further work and in terms of output. In other words: on the one hand the designed outcome of the practical and explorative work of the research was the organisation of the international symposium held in February 2018 in Venice, and on the other hand my work consisted in the organisation of personal and collective publications, some of which have already seen the light while some others are currently in production — and one will be, as a matter of fact, the collection of the symposium's proceedings.

Since the 1960s, Japanese animation — and later comics, video games and toys — started to get attention overseas and gradually gain recognition. They were first exported to Asia; later, to some extent, to the United States. And from the mid-1970s, much more deeply and diffusely, to West European markets: above all Italy, France and Spain. Now, the history of how Japanese animated series and, overall, television products have travelled overseas has been typically researched within a globalisation-related framework or the prism of film studies. In most contributions, the main focus was on the success of the commodities based on famous series or franchises, on fans and practitioners or on piracy. This is especially true in the subfield of anime studies, where one can observe a preference for analyses of fan practices and consumption over investigations on the objective conditions of production, the economic/entrepreneurial dynamics and the official, mainstream distribution via

either older (i.e. television broadcasting) or newer (simulcast, video-on-demand via internet) media platforms and technologies.

Nonetheless, when focusing on the success of Japanese animation for cinema and television (and their popularity) abroad, different frameworks may be needed to answer questions that precede consumption. Keeping that in mind, one of the objective of this project was to recount the work of the entrepreneurs who made it possible for Japanese animated series to be sold and purchased in the European marketplace: the tactics of the intermediary businessmen involved in the transactions between Japanese companies and their European interlocutors, who, especially in the 1970s, '80s and '90s, were mainly TV producers and executives. This was not only a hardly known story, but also one that displays a counternarrative to the idea of Japanese animation seen as a product which, supposedly, never really faced aversion among foreign buyers or watchers by virtue of its claimed “coolness”: an emerging notion which does not necessarily match with reality.

Past and recent sources — and mainly and foremost the first-hand research I have been conducting thanks to these grants — offered me sufficient data support to survey and assess four key dimensions of Japanese visual entertainment's popularity in Europe. Firstly, the high number of Japanese animated series and films that aired through national or nation-wide syndicated broadcastings or were released theatrically or for the home-video sector since 1959. Secondly, the relevance of the Japan-related press for kids released from the late 1970s. Thirdly, the frequency of reference to Japanese animation and related subjects in the general press. And lastly, the media history and impact of merchandised toys related to Japanese fictional characters. All this considered, it turns out that no other western country has ever seen a more substantial presence and social impact of Japanese animation (*anime*) and comics (*manga*) than Italy and France, followed by Spain, Germany and other countries in the region. In 2016 only, for instance, in France (population: 67.6 million) 13.6 million copies of manga were sold; the same year, in the United States (population: 325.4 million), less than 2.8 million copies were. The number of Japanese animated films and TV series released in Italy is the highest in the whole world, except for Japan itself; compared to the United States, the ratio is about 4 to 1: from 1963 to 2012, anime series released in the USA amounted to about 275; most of them were either aired on cable channels active only in specific states, or sold as VHS/DVDs for a niche market. In Italy, from 1976 to 2006, about 690 Japanese animated series and special films were released. In this count I am still neglecting a large quantity of VHS/DVD editions of old and new series, movies, OVA (original video animations) as well as both Japanese science-fiction (SF) and adventure live-action series and movies released plentifully in Italy as well as in France. If we also considered the number of anime released in Italy (and France, Spain, etc.) from 2007 to 2018, the aforementioned count would of course be even higher. Furthermore, unlike in the USA, in European countries TV-shows for the younger are always released nationwide, and home-video editions have always been very numerous. It is thus explained why the emergence of this project's topic was so strictly necessary in the discourse on media studies focusing on Japanese television culture, besides its interest in the fields of broadcasting studies, animation studies and cultural intermediation.

Upon these premises I enucleate here below some further, meaningful notes on the results.

1) The fluctuations in the selling prices of Japanese TV programs were the first primary cause in the decrease of purchase and broadcasting in most

European markets in which they were massively present in the 1980s; the Japanese origin of these TV products was tolerated or ignored, but it was never “welcome”. Basically, no local TV station or national network has ever really wanted to broadcast Japanese TV programs *by virtue of their being Japanese*: the reasons were, rather, the low cost, colourfulness, format (long seriality, that is, high number of episodes) and relatively good technical quality; none of these four features had to disappear or change, for the business to be still on and smooth. When the prices proposed by Japanese sellers increased, negotiations became more rigid or difficult; and most European buyers did not deem the bargain convenient any longer. I have started to analyse and discuss this phenomenon in the publications (some already printed, others forthcoming) numbered, in this Report (see section “Publication output”), 2, 3, 7, 19, 20 and 22 and in the conference papers numbered 24, 25, 26, 28 and 30 thru 35.

2) The decrease in the presence of Japanese TV products in Europe is also due to a second primary cause: the lesser the number of Japanese animated series for kids (3-14 y.o.) made in Japan, the lesser, automatically, the number of such products that could be purchased/distributed in Europe. In the survey and analysis of the internal production of Japanese TV shows, between 1975 and 2017 a strong reduction of those for pre-school and school children has been recorded, which is tightly intertwined with the gradual disappearance of Japanese TV franchises and shows from markets that had been very strong in the past decades — Italy, France, Spain — and with the lighter presence or lack of Japanese TV programs from other potentially strong markets, such as the UK, Germany, Hungary, etc. This phenomenon has been partly counterbalanced by the increasingly rich library of national or international online platforms, which are making growing quantities of older Japanese animated series for kids potentially available to new generations; but this availability only concerns the old series, while the objective decreasing number of newly produced series for the younger automatically has an impact on the entry age of new audience into the consumption of anime, which today more often occurs during teenage rather than during childhood, as it used to happen in many European countries during the 1980s and 1990s.

3) On the other hand, there has been in the 2000s and 2010s, in some European countries such as the aforementioned Italy, Spain, France and Germany (and more), a renewed interest in Japanese products (especially animated series and movies) among younger producers and managers in broadcasting companies, VOD and *simulcast* internet providers, and DVD publishers. This interest is limited to TV series and films for teenagers, young adults and adults precisely because of the lack of anime for kids in Japan. To this end we observe that today Japanese TV programs only have niche audiences all across Europe and only some cinema productions reach a wider audience (e.g. the movies by Studio Ghibli). In the latest years youth’s consumption of television has, in Europe, partly shifted from the “traditional” aerial/cable or satellite broadcasting to internet TV channels. To this end Japanese TV programs, in their being perceived as products for niches of young adults, have been one of the main products supplied by such platforms; there are also highly interesting examples of new internet television channels or platforms, such as NoLife in France, VVVID in Italy and Anime Limited in the UK or the transnational Crunchyroll, whose most viewed programs are Japanese TV animated series. In this sense, we can argue that at least this kind of Japanese TV programs has migrated from an “old” technology (television) to a new one (internet), and they are gaining again some space in Europe.

4) The factors illustrated in the above points 1-3, as well as the rise of anime’s

prices and other emerging conditions — new distribution platforms, shifts in the audience's demographics, the evolution of broadcasters' policies, a more critical public opinion — have dramatically changed the situation. On the Japanese side, for instance, since the 2000s stricter contractual clauses are demanded to avoid arbitrary censorship and/or ensure precise conditions of broadcasting; on the European side, new directives from the European Union's commissions pushed broadcasters to reduce the purchase of Japanese series, privileging European or US cartoons again, or to engage in direct production so to support the local animation industries. And this, oddly enough for those who think that Japanese anime are now more famous than ever, has led Japanese producers to reframe their strategies with European interlocutors: general broadcasting of anime is fading away, therefore new media must now be pursued, new platforms privileged. This novelty lays upon brand-new brokering dynamics, which are under scrutiny in this research and very different from the more traditional brokerage of the 1970s and 1980s; one of the most promising paths I will pursue in the Phase 2 is be that of researching the reliability in the field of anime of the notion of “cross-border gatekeeper” recently proposed by a team of Japanese scholars to frame the process of exporting Japanese creative products internationally.

One of the extensions of this research, which I am dealing with in Phase 2, is to investigate on the newer trajectories and critical issues of this dynamic; it will thus be possible to argue, for instance, that the developments in the expansion of Japanese commercial animation overseas are not to be seen as a smooth and limitless business, especially considering the ongoing sunset of traditional broadcasting and the emergence of new forms of computer-mediated consumption: both bootleg (read: piracy, Vimeo/YouTube unauthorised uploads) and legal (Netflix and similar platforms).

In the work conducted in the Phase 2 I am going to research the criticalities of the myth of Japanese animation's so-called “coolness”. The performance of Japanese animation overseas over the decades looks precarious, problematic, discontinuous: not as really popular and uniformly widespread as certain enthusiastic narratives led many to think. The myth of such success worldwide and the idea of a globalised presence of Japanese animation have been repeated in multiple venues — as though they were objective facts — by scholars who have often cited as solid sources articles and books which, on the contrary, are flawed in this respect and rarely show reliable data. The circumstances of anime's success should instead be framed as strictly depending on specific industrial and commercial conditions. And it appears that those very conditions are, as it has been shown and discussed in depth in these years, historically transient and unstable.

One last remark to reconnect to the importance of the hundreds of Japanese animated series that have been airing in the researched European countries since the late 1970s. It is possible to define it, figuratively, a chain reaction. An “anime boom” — as I defined it in several of my writings — that, oddly, has no rivals in any other world's region, aside from Japan. In Italy, France and Spain, in particular, the Japanese cartoons from the 1980s-90s have in some instances become a mainstream, multi-generational, socially ubiquitous *corpus*: far above the status of a subcultural form that characterises anime almost everywhere else. It was a process spanning over forty years. In certain instances, Japanese characters from televised animation became heroes that we can now qualify of *nazionale-popolare*, adopting Antonio Gramsci's terminology. In Gramsci, *nazionale-popolare* refers to a corpus of literature (novels, figures, tropes) in which a populace's members can identify as characteristic, representative of the nation. In effect, a peculiarity of Japanese

animated figures in the investigated national contexts — and of some specific intellectual properties above others — is in that certain Japanese heroes are now so embedded in mainstream culture to have assumed a relevance in the public discourses as national-popular figures, despite being widely *recognised as Japanese* by both the public and the media. The fact that certain Japanese franchises are being celebrated in these years in the mainstream media in some European countries as evergreen heroes is proof that today serious analyses on the phenomenon are still needed.