



# The economic ecology of Japan's anime industry

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# THE ECONOMIC ECOLOGY OF JAPAN'S ANIME INDUSTRY: THE TRIANGLE OF ANIME, TELEVISION AND ADVERTISING, FROM THE 1950S TO THE 2000S

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# The economic ecology of Japan's anime industry: The triangle of anime, television and advertising, from the 1950s to the 2000s

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## Abstract

Anime, an art form unique to Japan, has become a global phenomenon. Academic literature in the English and Japanese languages has been extensive, but attention to the economics of anime has been scarce. This paper focuses on the economic structure of the anime industry, arguing that anime has been sustained in an economic ecology involving the television and advertising industries. The prevalence and high profile of free-to-air, terrestrial television in Japanese society and culture, unparalleled in most other parts of the world during the post-war decades, has been an essential contributor to anime's development. Television in turn has been nurtured and expanded by the participation of advertising agencies. Japan's television and advertising industries exhibit unique features and business practices which have contributed to the creation and development of an economic ecology of anime that functioned well until around the year 2010.

## Keywords

Anime, Television, Advertising, Japan, Economic ecology

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# Contents

<b>1. Introduction.....</b>	<b>4</b>
1.1 Anime in Japan and Its International Scholarship .....	4
1.2 Approach Taken in This Paper .....	6
1.3 An Economic Ecology of Anime .....	9
<b>2. The Television Industry.....</b>	<b>14</b>
2.1 Television in Japan—NHK and Commercial Networks.....	14
2.2 Government policy .....	18
<b>3. The Advertising Industry .....</b>	<b>19</b>
3.1 Special Features of the Japanese Advertising Industry .....	19
3.2 Full-Service Provision .....	20
3.3 Remuneration Method.....	20
3.4 Non-exclusive Advertiser-Advertising Agency Relationships .....	22
<b>4. The Emergence of Television—Advertising Agencies as Incubators ....</b>	<b>23</b>
<b>5. ‘Time Ad’—Support for Television Production .....</b>	<b>26</b>
<b>6. Production Consortia—A New Form of Financing for Anime Production.....</b>	<b>28</b>
<b>7. Conclusion .....</b>	<b>31</b>
<b>References .....</b>	<b>35</b>

# **The economic ecology of Japan's anime industry: The triangle of anime, television and advertising, from the 1950s to the 2000s**

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2 September 2024

## **1. Introduction**

### **1.1 *Anime in Japan and Its International Scholarship***

Anime (a shorthand Japanese word for ‘animation’, by now an established English term) is a form of cultural expression uniquely developed in Japan in the post-WWII decades and widely circulated in the world since the 1970s. Anime has a history dating back to 1917,<sup>1</sup> but it was the 1963 launch on Fuji Television of the television show *Astro Boy*, created by Osamu Tezuka and his studio Mushi Production, that marked the beginning of modern anime as we know it. According to the database of anime works of the Association of Japanese Animations (AJA), a total of 14,710 anime titles were created from the 1910s until July 2022, of which 6,673 were broadcast on terrestrial television. (Of the remainder, 2,800 titles were for theatrical release, 4,028 were for packaged videos, and 1,209 were ‘other’.) (Animation Business Journal 2022, website).

In 2022 there were more than 800 anime studios in Japan, mostly concentrated in western Tokyo. Their estimated earnings were 341 billion yen (US\$2.6 billion) in 2022 (Association of Japanese Animations, 2023).<sup>2</sup> According to the AJA, the value of the broadly-defined anime industry—estimated on the basis of consumer spending on various activities related to anime—was 2,928 billion yen (22.3 billion USD) in 2022 (AJA 2023). The value of anime exports was 85.6 billion

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<sup>1</sup> According to The Association of Japanese Animations (AJA), 1917 was the first year that commercial anime was shown in public. “‘Anime taizen’ kōkai ni yosete’ (On the occasion of the release of ‘Anime Encyclopedia’), [「アニメ大全」公開に寄せて.pdf \(animedb.jp\)](#) , accessed 06/03/2024).

<sup>2</sup> Unless indicated otherwise, currency conversions in this paper are done using the average 2022 exchange rate of 131.46 yen per US dollar.

yen in the same year. Today, the major importers of Japanese anime are China and North America, but Japanese anime series have historically occupied many hours of terrestrial broadcasting in Europe, particularly in France and Italy (despite occasional strong criticism in those countries of the content of anime).

The global spread of Japanese popular culture has attracted much attention in the last two to three decades, but before that the thriving contemporary culture of Japan escaped the attention of the general public outside Japan. This changed considerably starting in the late 1990s. In North America, the success of Pokémon as a major hit in theatres in 1999, following a series of popular Pokémon video games and trading card games, sharply raised the profile of Japanese popular culture. Children around the world who grew up watching Japanese anime on television have become mainstream consumers of Japanese culture, with some developing a serious academic interest in, and even pursuing doctorate degrees related to, Japanese popular culture. Anime in particular, because it is arguably unique to Japan—see Kacsuk (2018) and Suan (2017) regarding the tension between style and ‘Made-in-Japan’—has attracted a large number of non-Japanese researchers, to the extent that there have developed academic networks and journals dedicated to anime studies (see Shamoon 2019: 165).

Anime scholarship in the English language tends to be dominated by the perspective of the arts and humanities, with a focus on textual, aesthetic, or socio-political analysis of specific works/genres/artists. While humanities scholars examine representations of Japanese culture and society in anime (Berndt 2018: 3), analysis of the economic structure of the anime industry, or of Japanese popular culture industries as a whole, has been lacking. There are a few notable exceptions, such as Otmazgin’s work (2013) analysing the success factors for Japanese cultural exports in Asia. But while it remains an important contribution to transcultural studies in East and Southeast Asia, Otmazgin’s book is by now somewhat outdated, and the Japanese companies’ strategies in the Asian region described in the book do not necessarily explain what those companies do at home. Similarly, scholars such as Dailot-Bul and Otmazgin (2017) and Pellitteri (2011), who are interested in cultural globalisation, examine the success of anime outside Japan in terms of organisational mechanisms and the marketing and entrepreneurship of anime exports, but they do not discuss these aspects within the context of the domestic Japanese market. Another exception is Steinberg (2012). Widely read amongst anime scholars, Steinberg’s monograph has an interesting focus, discussing the phenomenon called ‘media mix’. In English, this term usually refers to the ‘mixed use of the different media’, but as widely accepted and used in the literature on Japanese culture it refers to utilisation of the same content, such as anime characters, in audio-visual and other media forms as well as in merchandising. This practice, not unique to Japan, has

long been the major method of financing costly anime production for broadcasting. While Steinberg sheds some light on the production and financing of anime, discussing the case of *Astro Boy* in 1963, his ultimate interest lies in the intertextual spread of anime characters' visual representations in the Japanese media landscape. Although the 'media mix' form of anime financing has continued and developed further since the 1960s, that itself is not a focus for Steinberg.

## 1.2 *Approach Taken in This Paper*

The fundamental argument of the present paper is that we need to have a better understanding of factors exogenous to anime aesthetics, particularly economic factors (including industry and organisation structure) that have shaped the modes of anime production and distribution and led to anime as we know it. One can focus on exceptionally talented individuals in anime production and their innovative practices, or the activities of fans and their reading of text, but I approach the development of anime by examining industries and organisations outside the narrowly-defined anime sector. This approach is rooted in the perspective of Production of Culture, a well-developed empirical branch of sociology originally driven by the American sociologist Richard Peterson in the 1960s and 1970s (Peterson 1976). Peterson and his colleagues have examined various aspects and layers of factors and conditions that may appear external to cultural production but which in fact shape cultural content and quality. It is important to note that this perspective is different from the production of culture discussed by scholars in critical communications studies (e.g., du Gay [ed] 1997), as Peterson's school of thought in sociology is far more empirical, with a background in organisational and institutional sociologies. Summing up this approach, Peterson and Anand (2004) focus on six 'facets' of production: technology, law and regulation, industry structure, organisation structure, occupational careers, and market. As an example, rather than ascribing the emergence of a school of art to one or more particular geniuses, a Production of Culture scholar would discuss the changing context of the art market and the emergence of a social class with new and different tastes in art collection (see White and White (1965), one of the classic works in this tradition).

Taking this perspective, I will discuss the development of anime not in direct relation to the efforts of particular highly-talented individuals, but with a focus on socio-economic factors that have facilitated the massive production of anime in the style distinctive to Japan. More broadly, I intend to situate this paper beyond the realm of Japanese anime studies and place it in the context of creative and cultural industries (CCIs) studies. CCIs studies have blossomed since the early 2000s, bringing together scholars from different disciplines such as business studies, economic

geography, sociology, and media studies (Cho et al. 2013). Naturally the literature in English is dominated by Anglophone writers, who tend to claim the universality of observations made in their own regions and countries, both as a custom and (presumably) out of necessity in order to place their articles in international journals (see Jones et al. 2016). Many writers in Europe and in other parts of the world outside the Anglophone sphere follow suit in discussing the CCIs. Thus, it is now conventional to introduce the topic in a journal article by saying that the CCIs have become a major driver of economic growth, outpacing the general economy, and that governments worldwide are paying increasing attention to them.

However, such an assumption does not always apply to Japan. It can be said that the size of the CCIs in Japan is relatively large. The size of the anime industry has already been mentioned, whilst other industries such as publishing, music, television and video games are also large in terms of economic value: approximately 14.4 trillion yen, or 110 billion USD, in 2023 (Human Media 2024: 10). In fact, however, the size of the domestic CCIs market and the value of its exports have generally not increased dramatically in the recent decades. It is also difficult to say that the economic value of Japan's CCIs is particularly large relative to the overall economy of Japan. According to a survey commissioned by the Agency for Cultural Affairs (henceforth ACA) (CDI 2021; Fujikawa and Kawamura 2021) that measured Cultural GDP using methodology defined by UNESCO, Japanese CCIs accounted for only 1.9% of the value of the national GDP (in 2018), compared to 4.5% for the US (2017) and 3.5% for the UK (measured by Gross Added Value, 2018). Measurement challenges may make international comparisons difficult. Or it may be that Japan is an anomaly. But if so, this anomaly is a significant one, as the Japanese media and entertainment market is the third-largest in the world (it was previously second-largest after the US) (Human Media 2024: 116).

Perhaps due to the relatively small contribution of culture to the national economy and the traditional indifference to cultural affairs in politics and public administration, the Japanese government's attention to CCIs as an object of policy has been scant and sporadic. Take film policy as an example, as film is a classic target of CCIs policies in Europe and in East Asian countries, including China and South Korea. Public funding for film in Japan is close to nothing compared to that in these countries: In fiscal year 2024/5, support for film (including training for human resources, production projects, and support for exhibiting at international film festivals) provided by the ACA was 1,180 million yen for film and 904 million yen for 'media arts' (approx. 7.3 million euros and 5.6 million euros respectively, ACA 2024)<sup>3</sup> (see Kawashima 2016 for more details). 'Automatic support', which is prevalent in European film policies (Murtschetz et al [eds]

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<sup>3</sup> The exchange rate of 161.7 yen to one Euro was used (as of September 1, 2024).



2018), is non-existent, and utterly unthinkable in the Japanese context as film-making is largely considered to be a private sector activity. The other common form of public support for film, namely, tax incentives designed to attract film production projects for the purpose of contributing to economic development of the nation or region (see Castendyk 2018), also does not exist in Japan.<sup>4</sup> This leaves Japan as one of the few countries in the world that has not joined the economic competition to attract mobile movie productions. The highlighting of culture within the discourse of ‘Cool Japan’ policy can be considered an exception to Japan’s lack of government support for CCIs, but this is far from a policy as such. As I have argued elsewhere (Kawashima forthcoming), ‘Cool Japan’ is better understood as a campaign aimed at achieving various aims of the central government without concrete and sustained measures to facilitate growth in the CCIs.

Given my observations above, the economic scale and cultural quality of Japanese CCIs is a puzzle: How is it that they have developed to such an extent, at least up to the 2000s? The answer to this puzzle doesn’t lie in resources, for CCIs in Japan lack the level of resources that their counterparts in North America and Europe have at their disposal. In the North American ‘model’, so to speak, Global Hollywood (e.g., Disney) pours massive investment into content production with the aim of exploiting the global market. Capital is abundant and management is trained to maximise returns. Legal and other auxiliary services are also well-developed, to mitigate the risks inherent in cultural industries, to organize labour in the CCIs, and to help resolve conflict. In contrast, most Japanese anime studios are run on a shoestring, traditionally with limited capacity and little ambition to go global. Anime works have been widely broadcast in Europe, North America and Asia, but in most cases this has been ‘accidental’ (unplanned) and dependent on the efforts of entrepreneurial individuals, rather than the result of carefully-crafted strategies on the part of anime studios in Japan. Nor has overseas broadcasting of anime provided significant profits to the Japanese rightsholders (Itakoshi 2013; Dailot-Bul and Otmazgin 2017). Other Japanese CCIs—with the exception of the video games industry, which maintained a large share of the global market until the advent of mobile online games in the late 2000s—have had little need or incentive to go global given the sufficiently large size of the domestic market (Sugimoto 2021: 301, on manga but applicable to other sectors).

Juxtaposed to the North American model of massive investment and global exploitation by media conglomerates, the European model approaches the CCIs with governmental intervention and

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<sup>4</sup> It should be noted if this ‘indirect’ support for film projects is economically sensible is highly arguable (Castendyk 2018), but since it is so prevalent that no country can withdraw from the global competition.

support measures for policy purposes, be they cultural or economic. The term ‘European’ as used here is not confined to Europe as a geographical region; Japan’s neighbours South Korea and China may also be included in this camp.

In contrast to either of the above models, Japanese anime studios/distributors and other CCIs receive very little, if any, support from the government. Cultural policy exists in Japan on a modest scale to support heritage and the arts, including ‘new media art’, which overlaps somewhat with anime, but anime and other commercial CCIs are *de facto* beyond the scope of cultural policy. Industrial policy in Japan may pay occasional attention to commercial CCIs, but this attention is not sustained, whilst resources are only sporadically and modestly allocated.

What follows, as a way of unraveling the economic aspects of the Japanese anime industry, is in fact a detailed discussion of Japan’s broadcasting and advertising industries. This may disappoint anime scholars who instinctively feel that these two industries are not particularly creative, or that they even exploit anime. Compared to the under-staffed and under-funded anime studios, companies in the broadcasting and advertising industries are well-established and well-resourced in their respectively oligopolistic structures. Although they may only provide services that are auxiliary to the production of anime content, I would argue that it is absolutely necessary to study the three—anime, television and advertising—together, as they intersect and form an *economic ecology* of anime.

### 1.3 *An Economic Ecology of Anime*

Since the broadcasting of *Astro Boy* in 1963, television has been the primary home of and outlet for anime works. I mentioned at the beginning of this paper that 6,673 anime titles aired on television from the 1960s to 2022, but the number of *episodes* amounts to 175,089—26 times that number. This suggests that there is, on average, a half-year cycle of weekly broadcast for each title. It should also be borne in mind that Japanese anime is not only for children but also for grown-ups, young adults in particular; thus, various time slots are allocated to anime programmes, including late night hours. As exceptions, works by Studio Ghibli and by a handful of auteur directors such as Makoto Shinkai go straight to theatres, but television is the predominant place for anime distribution.

The scale of television and its high profile in Japanese society is unlike that of any other country, arguably even the US, as Japan has enjoyed an abundance of terrestrial broadcasting since the 1950s centered around two national channels of public broadcasting (NHK) and four commercial

networks (first in metropolitan areas and later nationwide). For a country the size of Japan (with a population of about 126 million in 2020), such extensive television offerings might seem extravagant, but the profusion of television media in a highly competitive environment has provided the background for the emergence and development of the many anime works produced and distributed in Japan. The government's policy in television broadcasting, based on the principles of licensing and structural control of media ownership, has served to create multiple commercial broadcasting companies in each of the country's 47 prefectures, each belonging to one of the major networks. These policies and commercial imperatives of the broadcasting business in Japan have been little discussed in the English literature.<sup>5</sup>

The second component of the economic ecology of anime is the advertising industry. Obviously, without advertising agencies, commercial television networks would not be able to survive, as it would be unrealistic for the networks to conduct direct transactions with individual advertisers. Japan's advertising market was the third largest in the world in 2023 (Dentsu 2023: 26), and had not been penetrated by global networks such as WPP and Omnicom Group as in other countries. Dentsu, Japan's largest advertising agency, topped the annual world rankings in 2009 (Advertising Age, 2009).<sup>6</sup> Prior to the digitisation and globalisation of the advertising business, the country's three largest domestic agencies—Dentsu, Hakuhodo DY Holdings, and ADK—formed an oligopoly, occupying about half of the market and deriving their largely domestic sales from non-digital advertising (Kōsei Torihiki Iinkai [Fair Trade Commission], 2007: 5–10). Dentsu was (and remains today) much larger than the other two, more than double the size of second-place Hakuhodo in domestic sales (Dentsu Media Innovation Lab, henceforth DMIL 2023: 179).

It is notable that Japanese advertising agencies do not limit their activities to either media buying or creative production, as is the case in other countries; they do both. They also provide other services that extend far beyond advertising narrowly defined. They serve clients in diverse areas that include public relations, store design, business consulting for e-commerce, and, not least, marketing support. They often act as a facilitator, coordinator and promoter of projects involving

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<sup>5</sup> The lack of descriptive information on national broadcasting is not unique to Japan. Broadcasting is regulated by the state, except in the case of Europe where there is also regulation at the EU level, so that descriptions of the broadcasting business (particularly commercial broadcasting) in an international and comparative context are generally limited. Internationally, research interests tend to be in the area of global television (i.e., the globalisation of television programmes/formats; for example, see Bielby and Harrington 2007, Shahaf and Oren [eds] 2011).

<sup>6</sup> Since then, Dentsu and other Japanese mega agencies have also built global networks by acquiring local groups and companies.

a diverse range of businesses from different industries and even the government. The diversity of business activities of these agencies has been pivotal to the anime business as well: as will be detailed below, anime production, which tends to be very costly, has typically been financed by the licensing of anime characters to advertisers and/or by investment in anime projects by the members of production consortia, in which advertising agencies play a major role. The size and diversity of business activities of Dentsu, unparalleled in other parts of the world, require detailed examination as we seek to understand CCIs in Japan, many of which rely on advertising revenues to one degree or another.

Accordingly, this paper, in identifying and illuminating the distinctive characteristics of Japanese CCIs, will highlight the unique features of Japan's broadcasting and advertising industries and the roles they have played in the development of anime over the past several decades. It must be noted, however, that the paper only traces anime's development from the early 1950s to around 2010, as the years after this period have seen dramatic changes in the media business. Those changes have been driven by the ever-increasing use of the internet; advanced technologies and sophisticated services, particularly mobile; the development of social media; video streaming services; a resulting decrease in time people spend watching television; the high-speed growth of digital advertising in the advertising market; and the development and expansion of marketing communication beyond the traditional use of media-placed advertising.

Despite these developments, Japanese television companies, surprisingly, have not changed much in their business portfolios and capital structure. But Japanese advertising companies have, going global through mergers and acquisitions and intensifying their efforts to develop expertise in digital advertising, digital non-advertising communications and data-driven marketing, all of which have been advanced by ever-changing 'ad tech': the software and tools advertisers use to buy, manage, and analysedigital advertising. The anime business, too, has changed in the last ten years or so, notably by starting to target the global market—something they had not been very good at before—as well as by forging alliances with video-on-demand services. Whilst such changes will be very interesting to examine, they have not totally eradicated the classic business models, industry structures, commercial practices and organisational arrangements discussed below, which remain largely intact. Recent changes will be briefly mentioned in the Conclusion but analysis of them will be left to another paper.

Through this discussion, although television and advertising may not immediately appear to be relevant to anime, an *economic* ecology of anime will emerge. When an 'anime ecology' is discussed in the arts and humanities or media studies literature, it is about anime in diverse media

forms, including live concerts and shows and even merchandise; this is often called ‘media convergence’ (à la Henry Jenkins 2006). But the present paper associates anime with television and advertising businesses, whose major concern is earning profits by attracting the largest viewership possible to television broadcasts, thereby increasing the economic value of advertising minutes, which benefits television and advertising companies alike. I am not arguing that anime is indispensable for the television and advertising industries; rather, the point is that those industries have some features peculiar to Japan and their financial and other resources have enabled the production and distribution of anime in Japan.

Such a cross-industry view recalls a paper on the development of the Japanese video game industry written by two economic geographers, Aoyama and Ishizu (2003). Widely-read by those interested in the industry, Aoyama and Ishizu’s paper argued that the video games industry in Japan in its early years (starting in the 1970s) drew on the expertise and resources of major manufacturing companies for the technological structure of hardware and drew on manga and anime artists for the creative design of software. They assert, thus, that the rapid development of the video games industry in Japan was facilitated by the use of resources formally outside the industry. Similarly, I argue that the development of anime owes much to the economics of the television and advertising industries.

In the following, I will examine more closely the details of the economic ecology surrounding anime. In Section 2, I provide a more detailed description of the scale of Japanese commercial television and how national networks operate in the context of the government’s policy for broadcasting.. Section 3 presents the basics of the advertising industry in Japan. As mentioned above, the top three companies in the industry have held strong positions in the global market thanks to three business features unseen elsewhere. Those features are: (1) being ‘full-service’, providing both creative production and media buying; (2) creative production and media buying both being provided mainly in return for media commissions (a certain percentage of the amount paid by clients to media for advertising); and (3) each company having thousands of accounts.

Section 4 of the paper discusses the early years of commercial television in Japan, with a focus on the role played by advertising agencies in their ‘incubation’ of the television industry—that is, their training of new personnel in the basics of operating a television station. It is well-known among anime scholars that the first anime series on television, *Astro Boy* (1963), was made financially possible thanks to the merchandising contract drawn up between Mushi Production and the programme sponsor Meiji Seika, a major confectionary company. The role played by the advertising agency Mannen-sha (which went bankrupt in 1999 and no longer exists) is rarely

mentioned in the anime studies literature, other than by Clements (2023: 170–171) in his extraordinarily detailed, encyclopaedical book on the history of anime. In fact, however, even an anime studio of such a renowned artist such as Tezuka would not have been able to approach all the relevant stakeholders and come to an agreement without the help of an advertising agency with expertise in the media business.

Section 5 will discuss a specific method of television advertising distinctive to Japan that supported anime series on television in the early decades (1960s–1970s) in particular: the programme-tied buying of commercial time, known as ‘time ad’ in Japan, as opposed to spot-buying. ‘Time ad’ has enabled continuous sponsorship of programmes of high quality and popularity, including those of anime works that target the family. Section 6 will analyse the production consortia system developed in the 1990s, which links anime, television and advertising and has become a near-universal standard for financing anime (and other audiovisual) projects. Production consortia are the epitome of what I call the economic ecology of anime, as representatives of television networks, advertising agencies, and other stakeholders join together to finance and guide an anime project, sharing the financial gains and risks, with each contributing their particular expertise. The concluding section of the paper discusses the implications of the trajectory that the economic ecology of anime has gone through and speculates on its future, as the sector is impacted by recent phenomena occurring outside this ecology.

The discussion and analysis in this chapter are based first on an extensive review of the academic literature in both Japanese and English, ranging from anime studies, cultural economics and sociology to media policy. The second source of information is interviews and informal conversations with government officials from the ACA, the Ministry of the Economy, Trade and Industry (METI), and the Ministry of Internal Affairs and Communications, as well as with professionals working in the industries (executives of Dentsu in particular) since the early 2000s. Third, seminars held by the Visiting Fellows’ Research Group and arranged by the Japan Commercial Broadcasters Association have been informative and inspirational; I have participated in them as one of the fellows since 2018, discussing the media practice and government policy for the sector with other scholars from various disciplines (such as journalism, communications research, and media economics). Fourth, attendance at a number of academic and industry conferences in Japan and in other parts of the world since the early 2000s—too many to list here, but as three examples, the American Film Market in Santa Monica, where film distributors and producers come together to make deals; the Cannes Lions, where advertising industry executives congregate for awards, discussions and workshops; and the Annecy International Animation Film Festival and Market—has enriched my knowledge about the inner

workings of the industry. My visiting professorship at UCLA in 2005/6, during which I attended lectures by and interviewed entertainment lawyers and executives of talent agencies in Hollywood, gave me a better understanding of the ‘American model’, which was important in terms of reflecting on what is missing in Japan’s CCIs. I was also privileged to take part in a 2016 week-long seminar held exclusively for Japanese film producers put on by UNIJAPAN in association with UCLA.

My thinking and analysis have also been informed by intensive reading and additional interviews conducted with the director of JETRO (Japan External Trade Organization) in Paris as well as online interviews with executives and media experts of Dentsu (to investigate the development of Japanese television in the post-war years as well as current practices in the television and advertising businesses) and former and current METI officials (to better understand METI policy towards CCIs) during the period of my stay at FFJ of EHESS (between April 2023 and April 2024). I also benefited from interviewing (online) fellow academics in the fields of television and media studies during this period. In addition, I have also made my own direct observations by visiting various sites and events, including multiple trips to the Japan Expo held in Paris each summer for European fans of Japanese pop culture.

Text and specific names originally in Japanese are the author’s translation unless official names exist in English. Japanese names are spelt in the Western way (given name first, followed by family name). Dentsu Media Innovation Lab (DMIL), which is often cited in this paper in providing statistics, is actually a collection of various data originally provided by various concerned industries; for the sake of simplicity, I cite DMIL without referring to the original data sources.

## **2. *The Television Industry***

### **2.1 *Television in Japan—NHK and Commercial Networks***

Terrestrial television is big business in Japan, with revenues from advertising and related business (excluding business unrelated to broadcasting, such as real estate) amounting to close to 2 trillion yen (15 billion USD) annually during the years 2012 to 2021 (DMIL 2023: 123; also see Ergül 2019, Chapter 1). Television viewership has decreased in recent years, particularly among young people, who find it inconvenient, time-consuming, and less interesting than other media. The importance of television for anime cannot be underestimated, however, as anime has developed in conjunction with the development of television first and foremost. Most anime scholars give

little attention to television in its own right. An exception is the book *The Anime Ecology*, by Lamarre (2018), which can be classified as television studies, traversing television, animation and video games. Chapter 6 of Lamarre's book offers a short history of television development in Japan, but the perspective taken is that of television studies and cultural sociology concerned with the construction of a standardised nation. Thus, Lamarre's main focus is not on economics but on a mass medium and how it shapes a society and a nation. In contrast, the following presents the historical development of television in Japan, including its scale as an industry and as a major mass medium.

One remarkable feature of Japanese television is that it is a hybrid of European and American broadcasting systems. Since as early as the 1950s,<sup>7</sup> Japan has had (at least in major metropolitan areas) two public broadcasting channels—NHK General and NHK Educational (similar to BBC One and Two in the UK)—as well as four commercial broadcasting channels (Fuji TV, Nippon TV, TBS, and TV Asahi), each with their own national networks (similar to the US). In addition, there is TV Tokyo, a smaller network with a limited scope geographically but with niche content that makes it popular in the areas where it operates. Nowhere in the world other than Japan did people have access to so many channels of terrestrial broadcasting in the 1950s.

Television is an exception within the CCIs in that it relies on state licensing to operate; no one can simply open a station and freely use the radio waves, which are a scarce resource allocated by a public regulator. In Japan, a license to broadcast is granted by the Minister of Internal Affairs and Communications (MIC) within a limited geographical scope. With the exception of Tokyo's key stations and Osaka's semi-key stations, which are licensed to cover Greater Tokyo and Greater Osaka, respectively, licensing is carried out on a prefectural basis (even though the radio waves may be received in neighbouring prefectures). Early decades privileged the Tokyo, Nagoya, and Osaka metropolitan areas with many broadcasting channels, while remote areas had less access to commercial channels because fewer broadcasting companies were set up there. Over time, however, all prefectures came to have the same number of channels as Tokyo. Government policy in the 1980s further facilitated the process of leveling out geographical disparity. Today there are a total number of 127 broadcasting companies in Japan, a number that might be viewed as excessive given Japan's population. However, there have never been any bankruptcies or mergers in the country's broadcasting history.

The landscape of Japanese television market, with its numerous stations and channels right from the start, contrasts sharply with that of European countries before they privatised broadcasting in

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<sup>7</sup> Four commercial 'key' television stations were established Tokyo between 1953 and 1959.



the 1980s. Up to that time, most countries in Europe had only one or two public broadcasting channels (Siune and Hultén 1998: 23–25), and people preferred listening to the radio (Casey and O’Brien 2020: 450). Today, after the privatisation of television broadcasting, European integration, and digitalisation, there are of course an enormous number of commercial channels available to European consumers, but many air films and shows imported from elsewhere, or fill air time with television shopping. Japan too has an enormous number of channels today if we include satellite, digital terrestrial broadcasting, and other channels on cable networks. However, the presence of the six (or seven in Greater Tokyo and Greater Osaka) terrestrial commercial and public broadcasters has been such a long-established fact that most Japanese viewers do not especially look for other kinds of broadcasting. Available statistics show that at any time throughout weekdays and the weekend, the percentage of people watching satellite broadcast (free and by subscription) or cable television channels (by subscription)<sup>8</sup> is very low, 2% at most, whereas terrestrial television watching can be as high as 23% in the Tokyo area (measured between April and June 2022; DMIL 2023: 216). The market size of satellite broadcasting and cable television combined is just above 1 trillion yen (2021, DMIL 2013: 134), but the cable television statistics include retransmission of popular terrestrial broadcasting programs, which artificially inflate cable’s market size. Satellite broadcasting is included in the portfolios of all the major television holding companies, but its position is peripheral. To illustrate this point, Nippon Television Holdings, Inc., for example, earned over 60% of its revenue from advertising on terrestrial broadcasting and only 4% from advertising on its free and for-pay satellite platforms in 2022 (Nippon TV Holdings 2023).

Also noteworthy is the fact that most of the content on Japanese television is created in Japan. It may well be true that the ‘information’ shows during the day and variety shows are similar to each other and, to quote Sugimoto (2021: 288), ‘filled with nonsense and funny programs’. But there are also a large number of legendary programmes of high quality and enormous popularity. One example is NHK’s ‘asadora’ (‘morning drama’, 1961 to present; see Scherer 2019), a serialised, 15-minutes-per-episode, drama programme series broadcast in the morning and rebroadcast multiple times during the week on NHK’s terrestrial and satellite channels for a period of six months (until 1991 each asadora ran for a full year), which consistently garners high ratings. The current asadora is always a topic of conversation in Japan, and it often serves as a launching pad for emerging actresses to become major stars. *Oshin*, an internationally well-known drama depicting the life of a woman from a poor family achieving success in business as she grew up, was an asadora that aired in 1983. Likewise, NHK’s ‘Taiga drama’, year-long period dramas

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<sup>8</sup> It must be noted however that more than half of households (52.5% as of April 2022) subscribe to cable networks (MIC 2022).

which have aired on Sunday evenings since 1963, portray well-known historical figures and the eras they lived in, attracting the attention of the public and often being featured in the media and even referenced in commercial television programmes. Each year the particular geographical location where the Taiga drama story takes place benefits from increased tourism, so various prefectures and cities are said to petition NHK requesting that a story and hero/heroine be chosen that is connected to their region. There are also many legendary anime series that have been aired on commercial television for decades. Many of these are for family viewing, such as *Sazae-san* (1969–), *Doraemon* (1979–), *Detective Conan* (1996–) and *Chibimaruko-chan* (1990–). There used to be some other long-running slots for family anime series such as *Heidi, the Girl of the Alps* (1974), which was sponsored solely by the beverage company Calpis (Clements 2023: 206–207).

This state of the industry—numerous local stations networked with key stations in Tokyo that produce original content—means two things in the economy of the television business. Firstly, whilst NHK is wholly financed by the fees paid by households, similar to the way BBC is financed, commercial broadcasters need to earn income, mostly from advertising. This means that the country of Japan must have a very large advertising market in order to maintain as many as 127 TV stations. In this respect, as will be discussed below in more detail, the three largest advertising agencies—Dentsu, Hakuhodo and ADK—play a critical role in matching stations and advertisers. Secondly, the television business in Japan must have the financial resources and creative capacity needed to create enough programming to fill the air time available. It is necessary for most stations to invest in and maintain their own radio wave transmitting towers, which is costly, particularly for local stations that have towers in distant locations within the prefecture or the greater area in which they are licensed to provide services.

In terms of creative capacity, it is the role of ‘key stations’ in Tokyo (and semi-key stations in Osaka to a certain extent) to produce content and disseminate it to their affiliates (around 26–30 for each network) across the country. This is made possible by the contracting relationships that connect local and key stations. Key stations sometimes have a financial stake in local stations, but the local stations are legally independent entities, run and managed independently. The network relationship is mutually beneficial for both sides. The local stations receive programmes to air (which occupy a large part of their daily programming) from their key partners in Tokyo, which have lavish budgets. Local stations receive payments from the key stations in return for broadcasting the programmes produced by the key stations. This may seem odd: one would imagine that the local stations would have to pay for programmes that are produced by the key stations, as the former have very limited budgets to create their own original content. But the local

stations receive those programmes (which include major dramas, news shows, variety shows and so on—in fact most of their television programming) for free, plus they also receive money for airing them. The reason for this is that key stations such as TBS are keen to have a national presence, but they are only licensed to broadcast within the Greater Tokyo area. So, for the key stations, the programming and money they provide to the local stations are seen as the normal costs of securing that national presence. In addition, advertisers are often automatically attached to the programmes offered to the local stations as the sponsors demand national exposure, not just exposure in Tokyo and Osaka. So in this context, local stations have little need to seek advertisers, yet they can receive programmes to air, made professionally with large budgets, and even some payment in return for the airing the key-station-produced programmes.

Programme production is, of course, costly and risky. Getting high ratings is necessary to keep the price charged for advertising slots high. Therefore, the television business has a single, strong focus on ratings. In the US, the risky business of television content production, particularly entertainment content such as drama series, which are more costly to produce than variety or quiz shows, is mostly undertaken by Hollywood producers. Historically, after television came into being and took audiences away from movies in theatres, major theatrical film studios started to produce programmes for television, drawing on the talent and workforce of the film industry. In Japan, such a shift did not take place until the 1970s, as the film industry banned the outflow of human resources to the television sector. In the early years of television in Japan, TV shows and Hollywood movies were imported from the US, but this soon became very expensive and the Japanese television industry had to quickly develop the capacity to produce programming on its own. As we will see below in greater detail, Dentsu, the country's largest advertising agency, supported television stations in this respect.

## 2.2 *Government Policy*

So far I have described the business and structure of television in Japan and how stations are connected to each other. It is also necessary to briefly discuss the Japanese government's policy for broadcasting, particularly in relation to media ownership. Quite unlike in any other country, TV stations, key, semi-key or local, were established via investment by newspaper companies. Asahi TV was at least partly established by the Asahi Shinbun newspaper, Nippon TV by the Yomiuri Shinbun newspaper, and so on. Local stations, too, were invested in by local newspapers, as well as by local chambers of commerce and prefectural/city public funds, as local communities saw it as imperative to set up their own television broadcasting stations. This was not necessarily

for the purpose of having their opinions and views expressed, but presumably in order to catch up with a kind of information nationalisation that was taking place in Japan after the war.

Such cross-ownership between different media is largely prohibited in many countries in order to ensure media diversity and protect freedom of expression. This kind of media ownership concentration in Japan has rarely been discussed as a serious issue in Japanese policy or academic circles. Rather it tends to be taken for granted that cross-ownership is only partial and programming/editorial decisions are totally independent (Itoh 2013: 408–409). Diversity in content, which may be viewed as the ultimate purpose of regulation of media ownership, is notoriously difficult to measure (Sokabe 2011). In recent years, local television stations have come to face economic difficulties. As described above, local stations can get national sponsors, but that alone does not cover their costs, and so they must also actively seek local sponsors. However, that has become increasingly difficult as depopulation has caused regional economies in Japan to weaken. Like elsewhere in the world, the emergence of the internet and convergence between broadcasting and telecommunications have been seen in Japan since the late 1990s. Deregulation could conceivably open the door to mergers and acquisitions of small local stations. However, reforms since 2000 have largely been incremental, as the Ministry of Internal Affairs and Communications and existing broadcasters have preferred to maintain the status quo and managed to resist pressure exerted by pro-deregulation politicians (such as Heizō Takenaka) to radically change the traditional legal structure that divides telecom and broadcasting regulations (Murakami 2023). Unlike many sectors of the economy that have been exposed to pressure for deregulation, such as finance, the broadcasting industry has largely circumvented reform and deregulation. Even some well-established and well-resourced IT entrepreneurs have failed in their efforts to buy out major broadcasting businesses (in 2004–2005; see Oyama and Lolli 2016).

### **3. The Advertising Industry**

#### **3.1 *Special Features of the Japanese Advertising Industry***

As briefly mentioned in the Introduction, major advertising agencies in Japan have maintained strong positions in the global market, even after the phenomenal economic growth of countries such as China. Japan's advertising agencies were traditionally purely domestic and private, but in the last 20 years or so they have become public companies traded on the securities market and have gone global through international expansion and the purchase of global networks in the tide of economic globalisation. This shift was a belated one, as many mergers and acquisitions of non-Japanese advertising agencies took place much earlier, during the 1970s and 1980s. By that time,

the Japanese mega agencies were already large enough to thrive without getting involved in the global networks operated by American and European companies. Their strength was based on certain features of the industry structure in Japan, which are distinctive in at least three respects in comparison with the advertising industries of other advanced economies. Firstly, agencies are in ‘full-service’, meaning that they provide an extraordinarily wide range of services. Secondly, they are compensated for providing those services by commissions they receive for placing advertising in the media rather than by the direct payment of fees. Thirdly, each mega agency serves a huge number of clients, even competing ones, whilst clients use different agencies according to their specific needs. Details on these features follow, drawing on previous work of mine (Kawashima 2006, 2009).

### ***3.2 Full-Service Provision***

The first notable feature of Japanese advertising agencies is that they provide ‘full-service’, including the functions of creative production, media buying, and marketing research. These services are not ‘unbundled’. This form of operation, which was once the norm in the US and elsewhere, was abandoned firstly in the UK in the early 1980s and later in the US in the 1990s. The decline in the West of the media commission system—payment in the form of commissions for advertising placed in the media—has created a separation between creative agencies (which produce TV commercials and do other branding-related work except for media buying) and media agencies (who in addition to media buying may advise the advertiser on the most effective media plan to achieve its objectives). As the Japanese agencies have grown, more and more services have been added to their portfolios. Very large agencies provide diverse communications-related services, such as public relations, sports and arts sponsorship, direct marketing, event planning and promotion, and branding consulting. These services alone may not always be profit-making on its own, but the agency’s income from media commissions is so large that (as explained below) it cross-subsidises them.

### ***3.3 Renumeration Method***

Secondly, Japan is one of the few countries in the world where the major method of agency compensation is commissions from advertisement placement in the media, as opposed to fees for particular tasks performed by agency for the client. Media commissions as a form of compensation was the norm when modern advertising developed as a commercial practice in post-war America, where the commission rate was 15%. Japan has continued to follow this practice even as it was abandoned in the UK and the US, where the 15% rate came to be viewed as

excessively high for what were regarded as mundane tasks. In the UK in the 1980s and the US in the 1990s, both at home and in the agencies' global networks, media buying was split off and creative services (namely, branding activities for clients) remained as the core of the business. The practice of 'unbundling' media and creative services in the West during these periods did not penetrate Japan, and Japanese mega agencies have retained both functions. Being full-service, they provide a range of services to their clients in creative production, media planning and buying, and marketing support.

In principle, Japanese advertising agencies still live on media commissions, with an official rate of 15 per cent of media sales in contrast to 4 to 5 per cent in most other parts of the world, where media buying is undertaken by specialist agencies that operate separately from advertising agencies. In compensation for the high media commissions, the Japanese agencies provide clients with other services such as branding support at minimal cost. Elsewhere, such services of a creative and specialist nature are paid for in the form of fees calculated on the basis of hours worked by the assigned team and the pay rates of different team members. From time to time, the possibility of shifting from media commissions to fee-based remuneration has been discussed in Japan's advertising industry, but because of the lucrativeness of media buying, advertising agencies have continued to claim that fee-based compensation would be too complicated and inefficient. In addition, they have always advanced the deceptive claim that they do not take money from clients' payments to the media; rather, they say, it is the media that pays them. In fact, most of the clients of Japanese advertising agencies, with the exception of some global brands, also find this compensation method easier to manage and have generally preferred that the established practice be maintained. Another advantage of this practice for clients is that, because they are paying high media commissions to the agencies, they feel it puts them in a superior position vis-a-vis the agency, which allows them to make demands which might seem unreasonable from the agency's perspective. With a fee-based system, the relationship between agency and client would be more like a professional partnership based on mutual respect and an equal footing—a relationship in which clients would no longer be able to exercise absolute power over agencies as they are used to doing.

The media commission practice has also been preferred by the media. This is related to the fact that Dentsu and Hakuhodo are not actually media representatives that buy media space on behalf of their clients upon request; rather, they are wholesalers for the media (Fujiwara, 2007). Thus, with little attention to the actual needs of the clients, they buy media space far in advance, in bulk and at their own risk, and then resell the space to their clients. The practice of advance purchase in bulk is particularly prevalent and meaningful in television because of the finite availability of

media space. It is beneficial to television stations to be able to rely on media commission revenue in advance regardless of advertisers' actual demand for placing ads, so the stations sometimes offer substantial discounts or favourable time slots to the agencies in exchange for advance purchase. As slots for television commercials are generally very expensive, such a risk-assuming practice as buying media space in bulk far in advance with the intention of reselling it clients months later can only be carried out by Japanese mega agencies such as Dentsu and Hakuhodo that have substantial financial resources and a large number of clients to resell the time slots to.

### *3.4 Non-exclusive Advertiser-Advertising Agency Relationships*

The third distinctive feature of Japanese agencies is the industry's practice regarding competing clients. Outside Japan, exclusive relationships between an advertising agency and a company in a particular category or sector are the norm, but such exclusiveness is not seen in Japan. Dentsu maintains around 6,000 different accounts, including accounts with major automobile manufacturers like Toyota, Honda, Ford, and BMW that compete with each other, while those companies also have accounts with Hakuhodo and other advertising agencies beside Dentsu. This works to the advantage of clients, as it produces competition among agencies to deliver the best results at the lowest cost. The result of this is that bidding for an account is frequent and competitive (sometimes overly so), but advertisers believe this to be an effective technique for agency management (Moeran, 1996: 46–48). At the same time, advertisers need to maintain good relationships with agencies in order to obtain regular discounts and notices of vacant spots suddenly available at low prices. In this way, whilst Japan's advertising industry is a highly competitive world, advertisers have not been as demanding and sensitive to the effectiveness of advertising as their international counterparts tend to be (Kōsei Torihiki Iinkai, 2005: 50). Obviously, advertisers may demand that an agency reduce its commission rate by, for example, threatening to shift an account to a different agency (Moeran, 1996: 173), whilst top advertisers obtain favoured rates (less than 15 per cent) on a regular basis. But on the whole, most advertisers are aware that they need the agencies and are prepared to pay the conventional rate of 15 per cent for mass media buying (Moeran, 1996: 173).

This section has described the business of advertising agencies in Japan. It might be more accurate to call them by some name other than advertising agencies, as their businesses have expanded enormously. The largest ones, including Dentsu, Hakuhodo and ADK, are capable of coordinating diverse media and thousands of clients for an infinite variety of projects. This extends to the coordination by Dentsu of mega sports events such as the Olympics Games and FIFA World Cup when they are held in Japan. Without Dentsu, which has access to the media and numerous

sponsors as well as a wealth of experience in planning and executing events of various kinds, it is believed that such high-profile, costly and risky events would be difficult to plan and manage.<sup>9</sup> The close relationships between the television media and the mega advertising agencies and their expansive business activities, which run in multiple directions, have implications for anime and its economic ecology. With this basic knowledge about advertising business, the next section will examine the early days of television broadcasting in which anime was nurtured.

#### **4. *The Emergence of Television—Advertising Agencies as Incubators***

In Section 2, I explained how commercial television stations started to develop in the 1950s. Prior to that, there were radio networks as well as the television network of public broadcaster NHK across the country. For Japan in the early 1950s, following its defeat in World War II and when the country was still in poverty, commercial television was not seen as feasible. However, even then, Matsutarō Shōriki, a media mogul of the day, saw things differently. With a strong belief that television would be a big thing, Shōriki quickly gathered together a group of like-minded men and rushed to apply to the government for a commercial broadcasting license. He managed to obtain one, and established Nippon TV in 1953. Having seen this, the next pioneer in the media business of this period, Hideo Yoshida, then president of Dentsu Inc., moved forward as well to establish a television station, which later became TBS.

Yoshida's contributions to modernising the business of advertising have been abundantly documented. In the present paper, however, my focus is on the role he played in 'incubating' the television business, an aspect on which little has been written. Available evidence suggests that he was very much at the forefront of the development of commercial broadcasting in Japan, having a strong belief in and vision for it and devoting enormous energy to it.

Yoshida knew exactly what to do to propel the development of television, based on his experience of having incubated commercial radio stations. To obtain a license to broadcast and set up a company is one thing, but that in itself does not put any programmes on the air, nor secure any

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<sup>9</sup> Dentsu has not been free from scandal. In 2022, Haruyuki Takahashi, an ex-member of the Tokyo 2020 Olympics organising committee and previously an executive at Dentsu, was arrested on suspicion of receiving bribes from Olympic sponsors (Boykoff 2023). Articles in popular weekly journals and magazines often appear accusing Dentsu of playing a 'fixer' role in many aspects of society, including politics.



audience or sponsors. Yoshida recruited a number of people who he believed would have interesting ideas for programming. He also hired a large number of specialists from the declining film industry for content production. Aware that commercial television was highly developed in the US, Yoshida sent staff there to learn the business of broadcasting, while setting up research groups on this topic within his own company (Ad Studies 2003a). All of this took place in a short period of time during the late 1940s and early 1950s.

As Dentsu already had close relationships with newspapers, both national and regional, Yoshida facilitated the formation of relationships between those newspapers and local investors such as prefectural governments and chambers of commerce, trying to persuade local newspapers in particular to establish television stations in their local areas. He and Dentsu helped with the preparation of television license applications. After licenses were obtained, Yoshida then sent out a large number of his staff, around 200 in total, to the newly set-up organisations of television stations, to coach and train personnel in broadcasting technology, the creating of programmes, selling commercial times and finding sponsors—all the things they needed to know about running a television station (Ad Studies 2003b).

Dentsu's practice of supporting television stations was not just a one-off at this moment in history; it continued whenever new stations in local areas or satellite stations entered the business of broadcasting. For example, the family anime series sponsored by Calpis mentioned in Section 2.1 owed much to Kikuzō Kato, a legendary Dentsu figure who closely worked with Nippon Animation in selecting source material from classical literature for children's anime and in planning content production and merchandising to widely promote the programme (Dentsu wo Tsukutta Otokotachi Editorial Committee 2021: 371–372). Similarly, staff from Dentsu would often attend programme development meetings, and sometimes suggesting modifications to suit the needs of potential sponsors. (At the same time, Dentsu staff were careful not to take any final responsibility for programming, which was to remain with the stations). Even in the late 1990s and first decade of the 2000s, Dentsu often proposed new programme ideas, packaged with actors and other entertainment industry talent as well as tied-in music and potential sponsors, to Tokyo's key stations.<sup>10</sup> This is similar to the work of talent agencies in Hollywood pitching their packages to television executives, but in the case of Dentsu, it goes further: by firmly committing itself to selling all the commercial time to sponsors right from the beginning, Dentsu excludes Hakuhodo and ADK from participating in any deal related to the particular programme in question (at least

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<sup>10</sup> Programme-tied sponsoring is a distinct Japanese practice, the details of which are described in the next section.

for some time after its launch). Television stations thus are assured of receiving a set amount of revenue, which mitigates the risk of investing in programme making.

It is said that Yoshida was immensely dedicated and passionate, as he was convinced that the development of television business would greatly benefit Dentsu. The logic behind this has already been presented in the preceding section: 15 percent of the money to be paid to television stations by advertisers would become Dentsu revenue. The larger the viewing rates are for the programmes, the higher price can be charged for the minutes to advertisers wishing to give their products national exposure. Eventually the greater the profits that Dentsu would earn.

Finally, one more achievement worth mentioning about Yoshida regarding his incubation of the television business in Japan is his setting up in 1962 of a company called Video Research to measure audience viewing rates. The monetary value of particular commercial time slots is a key concern in the triangle of the media, the advertiser and the agency. In principle, that value should be determined by the number of viewers that watch a commercial, but given the impossibility of knowing that number before a contract is signed, average audience viewing rates of the programme in previous weeks are normally employed. Viewing rates, measured by a company such as Nielsen, are reported and extrapolated to produce what is called Gross Rating Points (GRPs). An advertiser may want a certain number of GRPs during the next three months, for example, and can decide the mix of when and where to place its commercials and how many times to repeat them. The higher the number of GRPs (i.e., the higher than viewing rate) for a particular commercial slot, the more expensive that slot is. Within a given budget, and with the aim of obtaining a certain number of GRPs, advertisers, helped by the agencies, work out a media plan, deciding, for example, whether to buy more expensive slots for a shorter period of time or less expensive spots shown more times per day.

Obviously, audience viewing rates lie at the heart of this media planning (see Napoli 2003), and the rates measured at the level of the household by Video Research, the company that Hideo Yoshida established, have long been the standard used in the industry, officially agreed upon by the associations of advertisers, advertising agencies and broadcasters. Despite the fact that (1) many households have more than one television set, (2) advertisers have requested more precise viewing rates than those at the household level and (3) modern technology makes possible the collection of a variety of more finely-detailed viewing data, the household-level viewing rates provided by Video Research have retained primacy as the key ‘currency’ in Japan’s advertising business.

An article co-written by two managers of Video Research (2023) tells us of its early days. Yoshida instinctively understood the importance of creating a scientifically sound measurement system and establishing it as the standard for the industry. At the time Video Research was founded, the American company A.C. Nielsen already existed in Japan, but Yoshida insisted that Japan should have an audience measuring company that would be ‘neutral and scientific’. It is unclear on what grounds he could have accused Nielsen of being other than ‘neutral and scientific’, but Yoshida wanted to put Video Research in a position of control in the television advertising business. He quickly set up Video Research, with investment by Dentsu, to act as the official company to provide viewing rates to the television companies and sponsors. Historically, the Chairman of Video Research has been a retired executive from Dentsu.

## **5. ‘Time Ad’—Support for Television Production**

In Section 1 of this paper I referred to the existence of long-lasting programmes on NHK, but Japan’s commercial networks are also home to such programmes that are both popular and high in quality. One example is the quiz show *Hitachi sekai fushigi hakken!* (Hitachi: Let’s explore the mysteries of the world!), sponsored by the Japanese conglomerate Hitachi, which has aired weekly on Saturday nights since 1986. Such shows tend to enjoy the sponsorship of large industrial companies or conglomerates such as Toshiba or Hitachi, for whom such sponsorship is a form of corporate branding. When Toshiba ended its long-time sponsorship of the popular anime series *Sazae-san*, which had continued from 1969 to 2017, many companies bid to replace it, with three—Amazon Japan, Nishimatsuya, and Daiwa House Kogyo—winning the competition. (Nikkei Shinbun 31 January 2018). What is noteworthy about this (and possibly unique to Japan) is that this form of programme-tied advertising, known as ‘time ad’ in Japan, was originally the main form of television advertising in Japan, to which spot buying was added later. In the original format of ‘time ad’, advertisers would buy commercial spots close to the programmes they wanted to sponsor for a certain period of time. For example, they would pay a set amount at the beginning of a six month period to place their commercials before, after, and during breaks in the programme. This guarantees the position and the profile of the sponsorship and generally provides the sponsor with favourable conditions for running their advertisements. The target audience is relatively predictable and, crucially, it is guaranteed that the advertiser’s competitors in the same product category are excluded from sponsoring the same programme.

This practice is very different from the type of advertising whereby ‘spots’ are sold and bought in bulk and the prices fluctuate according to the viewing rates and demand. The ‘upfront market’ of commercial buying prevalent in the US, whereby advertising slots are bought each spring for

the following year (Curtin and Shattuc 2009: 48), seems similar to ‘time ad’ in that advertisers commit themselves to purchasing advertising slots in advance for a certain period of time, but Japanese industry experts consider it to be different: in the US, ‘upfront’ involves buying spots in bulk in bundles based on the estimated value of the networks’ upcoming programmes, whereas the Japanese ‘time ad’ practice is more closely tied to specific programmes, and can be conducted at any point of time in a year. As an example, in fiscal year 2022, 29% of NTV’s revenue came from ‘time-ad’, and 31.3% from spot ad sales (the remainder was from the sale of broadcast rights and other content-related business activities) (Nippon TV Holdings 2023).

To be more precise, I should also mention that there is another form of sponsorship besides buying commercial time around specific programmes: funding to help cover programme production costs. Historically, funds for producing content came partly from sponsors, which was the case as well in the early days of US television. But this can create conflict between broadcasters and sponsors over who owns the copyright of the programme, so broadcasters are careful to avoid mentioning that this additional funding is tied to the production of any specific programme; instead, it is considered part of the general revenue of the broadcaster. Today, the boundary between ‘time ad’ in its pure form and subsidising production costs has been blurred, as broadcasters group the two revenue streams together under the title ‘Time Ad and Programme Production Fees’. In 2022, for the commercial broadcasting industry as a whole, ‘time ad’ accounted for 43.3% of total revenues whereas the revenue from spot ad sales accounted for 49.9% (DMIL 2023: 123).

Even including programme production subsidies, ‘time ad’ programme sponsorship is not always more expensive than spot buying, and it creates bonds between sponsors and broadcasters, both of whom benefit from it. Sponsors can secure an association with what they see as high quality television programmes, while broadcasters can rely on a source of reliable fixed-in-advance income. With ‘time ad’, sponsors can also enjoy exclusivity as their competitors in the same product categories tend to be excluded; in spot advertising, by contrast, they would not know which of their competitors’ TV commercials might be aired near their own. It is unclear whether Meiji Seika was the sole ‘time ad’ sponsor for *Astro Boy*,<sup>11</sup> but it is highly likely that this was the case as this was during the early years of commercial television when ‘time ad’ was the dominant form of television advertising. Anime series for children and families, particularly long-run ones, have been beneficiaries of this system. ADK, only the third-largest advertising agency in Japan, was particularly active in ‘time ad’ sponsorship of anime works, securing additional sponsors and

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<sup>11</sup> Reading the detailed, historical description of the deal between Tezuka, Mannen-sha and Meiji Seika in Clements (2023: 170–173), one gets the impression that this indeed was the case, as he refers to no other sponsor for *Astro Boy*.

merchandising opportunities (like those for *Astro Boy*) in pre-determined specific time ‘frames’ (such as Sunday evening). ADK thus served as an intermediary between stations, anime studios and sponsors for a long time, an area that other agencies were unable to break into—or did not particularly try to do so, viewing anime as a low-value content. The leading position of ADK in anime would change as the ‘production consortia’ came into being, as we will see in the next section.

## **6. Production Consortia—A New Form of Financing for Anime Production**

The ‘production consortia’ (*seisaku inkai*) system is a major method of financing film and other media and entertainment projects uniquely developed in Japan (Kawashima 2019).<sup>12</sup> As this financing method is widely used in Japan, most films shown in theatres credit ‘Such-and-such Production Consortium’ as the producer. The production consortium is in essence a contract-based partnership (a cooperative, as defined by Japanese civil law) among different stakeholders involved in financing the production of a film, anime series, or musical show. This financing method epitomises what I call the economic ecology of anime, as three parties—anime studios, broadcasters and advertising agencies—each play roles while sharing risks.

A typical production consortium for a theatrical film includes an advertising agency, a television network, a video company, a publishing house, a merchandiser, a music label, a major trading company, and a major film distributor. Each of these entities has a stake in the film project in addition to the purely financial return obtained if the movie turns out to be a hit. Anime and film studios may be part of consortia if they invest as well, or they may stay outside, simply being commissioned to actually produce the work in return for a lump-sum payment.

This style of financing developed in the 1980s when Kadokawa, a Japanese media conglomerate that originated as a publishing house, began successfully producing films to promote its novels (an example of ‘media mix’, discussed by Steinberg, Chapter 4). This was a time when major broadcasters started to explore the possibility of expanding their business into the production of theatrical films, knowing that the growing availability of satellite and digital channels would create more air time to fill. Major broadcasters thus strategically started to invest in film making. Fuji Television’s *Nankyoku Monogatari* (Tale of the Arctic, dir. Koreyoshi Kurahara, 1983) was

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<sup>12</sup> Literally this translates as ‘production committee’, a term that often appears in the literature. However, as the film policy scholar John Hill previously suggested to me, the term ‘consortium’ more appropriately expresses what the entity entails, and I prefer to use it.

one of the early examples; this film turned out to be a mega-hit, earning 5.9 billion yen (25 million USD at the 1983 exchange rate, calculated by distribution revenue, as opposed to by box office revenue).<sup>13</sup> This particular movie project was purely a financial investment for Fuji Television; it had little relation to the company's television business except that it gave Fuji TV the right to broadcast the film on its television channels. But the following years saw a rise in planned integration between film projects and television drama series. The same actors, as well as directors and crew, would typically work on the feature film project as if it were an extension of the TV drama shooting.

The trend of financing projects via production consortia was accelerated by another mega-hit of this kind, when Fuji TV released *Odoru Daisōsasen* (Bayside Shakedown) in 1998, as a sequel to the TV series of the same title aired in early 1997. Box office revenues for this movie exceeded 10.1 billion yen, making it one of the highest grossing films of all time (Japanese or non-Japanese, excluding anime) in the Japanese market. Following this success, which took the industry by storm, the Bayside Shakedown franchise had three follow-up films, released in 2003, 2010 and 2012, as well as successful spin-off movies focusing on some of the protagonists in the series. The franchise has also included extended versions of television series, music CDs of soundtracks, novelised works and accompanying booklets, as well as a theatre play.

Production consortia offered a solution to the traditional film industry, which was in decline through the 1970s and 1980s with limited access to finance. The Ministry of Economy, Trade and Industry (METI), which has a section that deals with the content industries, had attempted to introduce liability limited companies (LLCs) or liability limited partnerships (LLPs) as possible structures for film financing that would give external investors opportunities to become involved in film projects whilst limiting their liability (as in the US). This effort failed, however, and in the meantime, the production consortia system took off. It is important to note that these consortia do not openly invite investors, thus the total amount of funds raised is limited to what the individual stakeholders contribute, whilst investor liability is unlimited. Consortia are put together by one of the usual partners—for example, an advertising agency, a television network, a publishing house, or a film distributor. The other partners are then recruited, and each partner's share and returns are negotiated. Entities invited to join a production consortium are those that have substantial experience in their particular business area and are assessed as being established, trustworthy companies in the Japanese economy. As mentioned above, this system began with film production

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<sup>13</sup> This record was broken fourteen years later by the Ghibli Studio anime film *Mononoke hime* (Princess Mononoke, dir. Hayao Miyazaki, 1997), which earned 19.3 billion yen in Japan alone.

and then spread to anime production, as anime grew into a major form of media and entertainment in Japan.

It is important to understand why entities choose to participate in production consortia, including what their aims are besides receiving a return on their investment. Obviously, the major film distributors are often a key member, as they have ample experience in the film business and operate distribution channels to theatres nationwide for both live action and anime films. A publishing house may be involved as the provider of the source material for the work to be produced. Movies financed in this way, particularly anime features, tend to generate merchandising opportunities for toys and other items that can sell very well, so the participation of a merchandiser is common. A partner whose motivation is less obvious is a large trading company such as Mitsui and Mitsubishi. Their incentive is related to their investment in satellite and cable broadcasting and the ownership of channels dedicated to films, so they want to be involved in premium content production. Trading companies also have invested in major convenience store chains such as Seven Eleven, which are generally open 24 hours a day, 7 days a week and are used on a daily basis by most Japanese for shopping, sending and receiving courier packages, retrieving theatre tickets booked online and other purposes. This makes them ideal venues for raising awareness about upcoming movies via in-store campaigns and special packaging in collaboration with food and confectionary companies, turning those movies into ‘events’, as is done for Hollywood blockbusters.

Two other partners are essential: an advertising agency and a television network, two of the components of the economic ecology of anime that I discuss in this paper. An advertising agency will take responsibility for all advertising and promotional activities; this is how Dentsu started to get involved with anime production (Dailot-Bul and Otmazgin 2017: 73). A television network often holds the rights to the source material (for example in the case of TV dramas); it has experience producing audiovisual products for popular entertainment; and, not least, it provides free advertising, for example in the form of announcements of the upcoming releases in its programmes. Each of Japan’s four national commercial broadcasters invests in about ten projects of this kind per year, accounting for the majority of movies distributed by the three major film distributors: Toho, Toei and Shochiku.

As mentioned earlier, a consortium is a weak tie, not registered as a legal corporation, but this suits Japanese stakeholders who usually know each other. Members hope to maximise return on their investment, but their primary interest is in the money they can earn in their specialist areas, such as advertising or merchandising. The individuals in the consortia who are responsible for the

film or anime work are ‘salaryman’ employees of their respective companies and receive no monetary reward apart from their normal salaries as company employees. Thus, they tend to lack entrepreneurialism. If the production company makes a financial investment in the project, it may hold part of the IP for the finished product, but it typically does not rigorously pursue maximisation of returns from its IP share as it is too busy with content production. This system has expanded the production budgets for theatrical films, and later for anime series on television, thereby changing the economic landscape of filmed entertainment. However, as discussed above, as consortia members are not particularly keen to exploit the full economic potential of a work, including that overseas, the production consortium system works to hinder further development of the Japanese film industry, especially beyond Japan.

There are some other challenges with the production consortia system that should also be mentioned. One related to anime has to do with exports, as the overseas counterpart (buyer) often demands all rights: for theatre release, broadcasting, online distribution, and so on. This can create conflict with members of the production consortium, who may have business interests in the export market. Another issue is the absence of a central power within the consortium; this prevents quick decision-making. Projects are green-lighted when member companies are convinced of the economic potential of the project due to the presence of a television network and proven popularity of the source material. The members have little actual experience with or interest in judging the cultural or even the economic value of a proposed work on the basis of the script. With anime as well, most members are not particularly interested in maximising the total earnings of the title. Their focus is on the money they can earn in their particular area of expertise, and they are generally unenthusiastic about and inexperienced in pursuing international markets (Dailot-Bul and Otmazgin 2017: 73).

## **7. Conclusion**

Earlier in this paper (in section 1.2), I posed a puzzle: How have Japan’s CCIs achieved the economic scale and cultural quality that they have without the kind of support that CCIs receive in the European and American models? Japanese CCIs do not have access to the governmental support often found in the European model. And they do not possess any of the features that characterise the American model: the capability of financing and bringing to life colossal projects that appeal to global audiences and exploit the global market, as well as highly-developed structures and systems for managing talent and labour, resolving conflict between participants, and mitigating the risk inherent in these industries. Anime, a major CCI original to Japan, has none of these. It has been a cottage industry from the start, centered around talented individuals



obsessed with their particular artistic/cultural visions. I have demonstrated how the growth of Japanese anime from the 1960s to the 2000s was made possible because anime was integrated into what I call an economic ecology of anime involving the television and advertising industries. Both the television and advertising industries have features and business structures unique to Japan. Those features and business structures have benefitted both broadcasters and big advertising agencies, and created an economic ecology in which anime content has been exploited, and thrived. Anime is highly attractive to certain kinds of industry sponsors, and appeals to a large, multi-generation segment of the Japanese population, which serves the purposes of these two industries seemingly external to anime.

The nationwide presence and a high profile of television in Japanese society and culture, unparalleled in many parts of the world during the post-war decades, has been essential to the development of anime. The paper has also delved into the early days of the commercial terrestrial television business by highlighting the comprehensive support given to the nascent industry by the advertising agency Dentsu. The television sector has since developed national networks that have not been seriously disrupted by deregulation and digitalisation, but rather shielded from these forces thanks to the government's preference to maintain the status quo. Japan's major advertising agencies are gigantic in scale and 'full-service', engaging in a wide range of business activities covering creative production, media buying and marketing research. They hold thousands of accounts, even those of competing companies. The remuneration system, based on media buying, has worked to cement the ties between broadcasters and advertising agencies. The television and advertising industries have thus enjoyed privileged positions in the media business and mutually benefitted from the development of commercial culture since the 1950s. Neither broadcasters nor advertising agencies have been particularly keen on anime, but the anime genre has become firmly rooted in television and works to enhance the economic ecology of the media and advertising, particularly when it provides merchandising opportunities for specific kinds of sponsors by appealing to family viewers (as in the case of *Astro Boy*). The paper has shed further light on this alliance by explaining the practice of 'time ad', which has long benefited anime studios, sponsors and broadcasters. It is clear that without the deep involvement of the television and advertising industries, anime would not have developed to the extent that it has, attracting global audiences.

The structure, business models and organisational arrangements of these industries may not immediately invite curiosity among anime scholars or even those in CCI studies as television and advertising are traditionally viewed as being only 'semi-creative' at best. Television may receive attention in CCI studies when it is about content production, but studies on broadcasting are

usually conducted separately under the category of communications industry research. As I have described, however, the two functions of content production and content delivery are usually carried out by the same companies in Japan. Advertising companies may attract attention in CCIs studies for their creative services, but not as media buying agencies. But again, these two functions (and many others as well) are carried out by the same agencies in Japan. The diversity and far-reaching capacities found in Japan's television and advertising industries, the present paper demonstrates, have shaped in central ways the development of an economic ecology of anime that has sustained anime culture.

As explained at the beginning, the chronological scope of this paper only covers the years up to around 2010, as various changes have taken place since then to disrupt the economic ecology of anime that I have advanced. To describe those changes in detail is beyond the scope of this paper, but I will touch upon several of them in the remaining space. The most influential change is the decline in television viewership. More and more of the time people in Japan devote to media consumption is shifting to the use of the internet, like elsewhere in the world. Television remains a major medium for information and entertainment, freely accessible for everyone, but for anime, television is no longer the only, or best, window for product exposure. There was a time when anime for young adults was broadcast late at night to a limited audience, and then packaged into DVDs that sold well to fans who could afford to pay premium prices. According to the estimates of the Association of Japanese Animations, its member studios earned 35.8 billion yen from DVD sales in 2002 (286 million USD at the average 2022 exchange rate), but this dropped to 15.3 billion yen by 2012 and to only 5.3 billion yen in 2022. However, spectacular growth has been seen in income from international markets (including merchandise licensing fees).<sup>14</sup> Further, the development of video-on-demand platforms such as Netflix and anime-focused Crunchyroll (now part of Sony Group) has been a major game changer. Netflix is now said to provide substantial funds to commission Japanese studios to produce original anime works (although precise information on this is hard to come by). Netflix also insists that its suppliers employ workers under the same conditions as those in the US, which allows anime studios to offer a much more favourable employee work environment than has previously been the case in Japan. To what extent Netflix demands that the content it commissions be globally orientated in aesthetic terms is unknown, but some critics in Japan are concerned that what has made anime unique may well be diluted when produced for global audiences.

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<sup>14</sup> It appears that the Association does not include income from global platforms such as Netflix and Amazon Prime in the 'international markets' category.

The position of the Japanese mega advertising agencies is also changing, because of both the decline of traditional television and the rise of digital advertising and marketing communications. The latter tends to be less lucrative than the traditional buying of media and taking of commissions. The official commission rate of 15 percent is under pressure as digital advertising has developed and new entrepreneurs have come to play a major role in it; the advertising agencies are therefore trying to catch up with digitalisation and searching for other sources of revenue to sustain themselves. In the meantime, Dentsu in particular has been discredited due to scandal, including the suicide of a young employee in 2015 due to overwork and harassment in its the digital division, and the arrest of a former executive for accepting bribes as a member of the Japan Olympic Committee during preparations for the Tokyo Olympic Games. Japanese television networks have also come under strong criticism for turning a blind eye to decades of sexual abuse by the head of Japan's largest talent agency, the former Johnny & Associates (see Pruso 2024). A sexual assault lawsuit filed against Hitoshi Matsumoto, a popular comedian managed by the Japanese entertainment conglomerate Yoshimoto Kōgyō, has been another blow to the television business and culture, as television networks have relied heavily on both Johnny & Associates and Yoshimoto Kōgyō in sourcing talent for their programmes.

In the meantime, anime has strayed from its traditional economic ecology, partnering with other entertainment companies that produce, for example, what are known as 2.5D theatre shows, games and live concerts. (2.5D refers to works that lie somewhere between the 2D realm of manga, anime, and video games and the 3D realm of the theatre.) Voice actors for anime have become well-established stars in Japan, and are in high demand for live concerts and other events that showcase their singing and performing talent. This does not directly benefit the anime studios as no IP applies to the content of their performances, but the synergy effects are positively felt.

Exposure to anime is ubiquitous in Japan, so much so that anime characters and stories are used even in pachinko slot machines, benefitting the IP holding-studios substantially in a form quite apart from television broadcasting, which was the gateway for anime IP exploitation in the past. The classic model exemplified by *Astro Boy*, linking the studio, the character and the sponsor, organised by an advertising agency, and made possible by the television station that airs it, may still persist, but the presence of the two stakeholders exogenous to the anime studio—television networks and advertising agencies—is less important today than it once was. Major anime studios, seeking better deals, are increasingly eager to work with game developers, music producers, stage show producers, tourism producers and local governments. In the successful case of *Demon Slayer*, which topped the global box office in 2022, the presence of television stations had little impact, and the anime's production consortium had only a very small number of members, not

even including an advertising agency. But with Sony in the background—the anime studio Aniplex was bought out by Sony and is now a subsidiary of the Sony Music Entertainment—the roll out of the *Demon Slayer* franchise was skillfully planned to maximize the box office results.

The patterns of anime development are much more diverse and complex today than they were prior to 2010. The task of tracing and analysing the dynamics of the economic ecology of anime that is in the process of emerging from the present situation will be left to a future research study.

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"Credit Guarantees and Zombie Firms: A Case Study of Small and Medium-Sized Enterprises in Japan", Scott Wilbur (Yale University), 2018 FFJ/Banque de France Fellow

**DP 19-04 (October 2019)**

"Impact of R&D Activities on Pricing Behaviors with Product Turnover", Yasushi Hara (Hitotsubashi University), 2018 FFJ/Michelin Fellow, Akiyuki Tonogi (Toyo University) & Konomi Tonogi (Rissho University)

**DP 19-03 (September 2019)**

"From Agribusiness to Food Democracy. Comparative Study on Agricultural Policy and Organic Farming in France and in Japan", Shoichiro Takezawa (National Museum of Ethnology, Japan); 2018 FFJ/Air Liquide Fellow

**DP 19-02 (June 2019)**

"Legitimation of Income Inequality in Japan: A Comparison with South Korea and the United States", Shin Arita (The University of Tokyo), Kikuko Nagayoshi (Tohoku University), Hirofumi Taki (Hosei University), Hiroshi Kanbayashi (Tohoku Gakuin University), Hirohisa Takenoshita (Keio University) and Takashi Yoshida (Shizuoka University); Prizewinners of the 2019 FFJ/SASE Best Paper Award.

**DP 19-01 (May 2019)**

"A Study on New Mobility Services and Sustainable Urban Development", Ai Nishimura, 2017 FFJ/Renault Fellow

**DP 18-06 (December 2018)**

“A Study of New Technologies of Personal Mobility and Robot Suit for the Elderly and Persons with Disabilities”, Toshiaki Tanaka (University of Tokyo, Hokkaido University of Science), 2017 FFJ/Valeo Fellow

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“Developments in Well-Being at Work in Japan: A Survey and a Comparison with France”, Louise Baudrand (EHESS), César Castellvi (EHESS), Nao Kinoshita (EHESS), Adrienne Sala (Sciences Po Lyon) & Sébastien Lechevalier (EHESS, Fondation France-Japon de l'EHESS)

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“Cross-cultural (France and Japan) and Multidisciplinary Discussion on Artificial Intelligence and Robotics: Tendencies and Research Prospects”, Naoko Abe (CEAFJP Research Fellow)

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“Impact of Shareholder-Value Pursuit on Labor Policies at Japanese Joint-Stock Companies: Case of Nikkei Index 400”, Kostiantyn Ovsiannikov (University of Tsukuba, Prizewinner of the 2018 FFJ/SASE Best Paper Award)

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