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Bounthavy SUVILAY

Abstract

In order to understand how transnational exchanges have evolved and how a home video market has been organized in France, this paper tries to trace a history of the beginnings of the VHS industry from the late 1970s to the early 2000s. We will focus on three phases of market development to show how pricing strategy and short-term development prospects damage the image of the product and perceived quality of Japanese cartoons. After a first period, in which anime seem to be treated as non-significant cultural by-products, during the second phase of growing the market is intensified by the activity of amateurs through the creation of distribution networks. They tried to change the image of the product using different methods of legitimation. But in the third era, the rapid collapse of the market is favour by overproduction and the technological transition from the VHS to DVD, and because of the dumping of prices, the cartoon is once again considered a cheap product.

Keywords: Home Video Market, Anime, Fandom, VHS, France

With the development of Internet and digital technologies, exchanges have become faster and the traces left by these are easy to retrieve. Professionals and amateurs can easily broadcast audio-visual contents on online platforms. In order to counter the non-legal offer of anime by fans French publishers were compelled to propose simulcast¹. But by the end of the 1970s, the transnational circulation of cultural products was more difficult. During its short period of operation, the VHS format enabled audio-visual products to be broadcast globally and not only through official broadcasting networks. There was no invasion of Japanese products as presented in the press of the 1970s but importations and adaptations carried out by entrepreneurs connected

¹ The situation is so tense between the French rights-holders and the pirates that an article on the subject has appeared in a mainstream newspaper. See (Woitier, 2013)

with television and by fans. In order to understand how these exchanges have evolved and how a home video market has been organized in France, this paper tries to trace a history of the beginnings of the VHS industry. If there has already been a thesis on the DVD market in France (Beldi, 2013), there is no study of the prior period. This report is made difficult because there are few traces of the non-legal distribution channels and legal deposit did not exist before 1985 in France. Through interviews with people who have worked in the VHS market, we try to retrace the evolution of the anime home video industry from the late 1970s to the early 2000s in order to analyse the change in attitudes towards Japanese cartoons. We will focus on three phases of market development to show how pricing strategy and short-term development prospects damage the image of the product and perceived quality of Japanese cartoons. After a first period, in which anime seem to be treated as non-significant cultural by-products, during the second phase of growing the market is intensified by the activity of amateurs through the creation of distribution networks. They tried to change the image of the product using different methods of legitimation. But in the third era, the rapid collapse of the market is favour by overproduction and the technological transition from the VHS to DVD, and because of the dumping of prices, the cartoon is once again considered a cheap product.

A Television-Related Market: Emerging Market of Children Audience

In 1977, the Japanese manufacturers Sony and JVC launched the first home video recorders on the French market introducing a practice that was hitherto reserved for a few professionals. In 1979, there were only

50,000 video recorders in France and in 1982 this number rapidly increased to 350,000 units. At the end of 1983, there were 1,500,000 VCR installed in households, 7500 titles, 140 distributors and 3000 video stores (Cotrel 1984, 1).

In late 1970s and 1980s, the home video market was still in its infancy. Only 1.2% of French households with television were equipped with VCRs. During the emergent phase of the home video market, the price of a cassette was very high and few consumers could afford it since the price of a movie on videotape exceeded 600 francs (approximately 92 €). At the end of 1979, the first titles of pre-recorded videocassettes appeared on the French market. In 1980, there were 5 distributors for a catalog of 100 titles of which three quarters were horror movies and pornographic films completely excluded from television channels (Cotrel 1984, 3). Apart from the VCR market in which video functioned as a value added entertainment medium principally dedicated to the movies, there was a niche market devoted to kid programs. These television broadcasts for children were a novelty on French television and were linked to the opening up of competition between channels (Chaniac, and Jézéquel 2005).

By the mid-1970s, Japanese anime series were broadcast on French television as *Le Roi Léo*² in 1972 and *Prince Saphir*³ in 1974 (Faviez 2010). But with the huge success of *Goldorak, le robot de l'espace*⁴ in July 1978 on Antenne 2⁵ that the history of anime home videos really began in France. Children became so fond of the adventures of "Prince

² *Jungle Taitei*, Mushi Production, 1965.

³ *Ribon no Kishi*, Mushi Production, 1967.

⁴ *Goldorak* is the French title of *UFO Robot Grendizer* (Tōei Dōga, 1975). The name is a creation of Canestrier who had mixed two other titles he enjoyed: *Goldfinger* and *Madrake* (Radenac 1979).

⁵ It was one of the three channels available at this time. Antenne 2 is now known as France 2.

d'Euphor"⁶ that Antenne 2 received an avalanche of mail from the young audience. At that time, there were no social networks to show enthusiasm. But two thousand letters arrived daily for *Goldorak* and it was quite a considerable figure. This anime became a social phenomenon⁷. The man behind that success was Jacques Canestrier. He managed to convince the leaders of the public channel to broadcast this Japanese series. This jack-of-all-trades from southern France was a film producer who had the opportunity to work with René Borg on one of the first French cartoon produced in Japan: *Oum, le dauphin blanc*⁸. On this occasion, he discovered the prolific Japanese domestic market and bought the rights of several series. The production of anime was very important and inexpensive: one minute of an anime episode costs three times less to produce in Japan than in France (Lindon 1978). Even if the Japanese do not produce series for export⁹, Canestrier decided to buy the rights of several series. Then he tried to broadcast them on terrestrial channels through its audiovisual distribution company: Pictural Films. He successfully managed to sell the rights of *Grendizer*, *Albator*¹⁰ and *Candy*¹¹ to TV channels. He also quickly understood the

⁶ Canestrier and his team had changed almost all the names of the characters and all the Japanese references in order to make the series more French for the audience.

⁷ The craze was of such importance that the mainstream press denounced the mercantile and violent side of this anime. Journalists believed that children suffer of "goldorakite" and that producers perpetuate a "goldorackett" (extortion of their pocket money). The press is not the only one to criticize the brutality of the images. In his book, the psychologist Liliane Lurcat (1981) warned parents against this series as too disturbing for children according to her criteria. Subsequently, the politician Ségolène Royal (1989) resumed the harangue against the Japanese anime that had supposedly invaded the small screen in his essay.

⁸ *Oum le dauphin blanc* (Saga Film, 1971) is a French animated series. The thirteen episodes have been created by Vladimir Tarta and directed by René Borg. It was broadcast in 1971 on national TV channel.

⁹ In his book, Bruno-René Huchez describes how he brought back the audiovisual tapes of *Grendizer* in France at a time when there was no company to manage exports of cartoons (Huchez 2015).

¹⁰ *Albator* is the French title of *Captain Harlock* (Tōei Dōga, 1978).

¹¹ *Candy Candy*, Tōei Dōga, 1976.

interest of home video in the form of magnetic tape. To extend the success of *Goldorak* and *Candy*, VHS tapes containing four episodes per cassette were launched. But the editor never broadcast all the episodes of these series in this format. Furthermore, a film of *Goldorak* is formed from a mounting of some episodes of the series¹². It came out in cinemas in 1979 and it became the first Japanese anime to become successful in this format.

For the producer, videotapes represented only one way of making the purchase of television rights profitable and they were not its main activity. The Canestrier catalogue was composed of series that he had not been able to sell to TV channels and several movies that he had also bought the rights to. Several *anime* first available on VHS were thereafter broadcast on TV channels with another title. For example, *Hana no ko Lun Lun*¹³ was first published with the title *Lulu : le mystère de la fleur magique* in 1982. Then it has become *Le Tour du Monde de Lydie* on the TV channel, la Cinq¹⁴. *Galaxy Express 999, le Train de l'espace*¹⁵ was released on VHS in 1979, then it was broadcast in 1988 on TF1¹⁶. *Arō Enburemu Guranpuri no Taka*¹⁷ was initially renamed *Formule 1* when it was on VHS in 1983. It has become *Grand Prix* in 1989 when it was broadcast on la Cinq.

Canestrier was not the only one interested in the new home video

¹² They have remixed the episodes 1, 2, 4 and 10 to make a single story that lasted long enough time to broadcast it as a film in the cinemas.

¹³ *Hana no ko Lun Lun*, Tōei Dōga, 1979.

¹⁴ Jérôme Seydoux and the Italian Silvio Berlusconi created the French fifth television channel: La Cinq. The network broadcast from February 1986 to April 1992. During this period, the channel had broadcast a lot of anime that was already popular in Italy

¹⁵ *Galaxy Express 999*, Tōei Dōga, 1978.

¹⁶ TF1 (Télévision Française 1) was the first national television channel launched in 1975. It was a government-owned television broadcaster. Since 1987 TF1 became a private national French TV channel.

¹⁷ *Arō Enburemu Guranpuri no Taka*, Tōei Dōga, 1977.

market in the late 1970s; other publishers were getting into this market such as Billy Clap Video, DIA (international audiovisual distribution), Spectrum (brand of PolyGram Video), Cartoon video and Adès Vidéo. But it is very difficult to get an accurate and comprehensive picture of the VHS market of this period. As the legal deposit of video tapes was only compulsory since 1985, it is important to note that there is some variance in the identification of the producer, editor or company who has released the anime VHS. These uncertainties in the copyrights of videotapes were common in the 1980s. To compound this, very few cassettes are available at the BNF. One of the most prolific editors was Fil à Film, an independent company founded by Jean-François Davy. It was renowned thanks to the publication of feature films through the collections “Palme d’or” and “Les films de ma vie”. This editor also had the largest duplicating videotapes site in the Paris region (Video Thumb). As Canestrier’s company, Fil à Film has mainly published episodes from series that haven’t been previously broadcast on TV such as *Edgar, le Détective cambrioleur*¹⁸, *Crocus*¹⁹, *Dan et Danny*²⁰, and *Super Durand*²¹. The fact that most of the titles of this catalogue has been previously broadcast on national television ensure Fil à Film that the products were already well known by the audience, reducing the need for proper marketing or expansion into the relevant markets.

This tactic was quite common in the 1970s-1980s. René Chateau Video, another VHS publisher rather specialised in French films, also released some anime previously broadcast on TV channels. It has

¹⁸ *Lupin III*, Tōkyō Movie, 1971.

¹⁹ *Tongari boshi no Memor*, Tōei Dōga, 1984.

²⁰ *Dirty Pair*, Nippon Sunrise, 1995.

²¹ *Mirai Keisatsu Urashiman*, Tatsunoko Productions, 1983.

published several series as *Judo Boy*²², *Le Livre de la jungle*²³, *Cobra*²⁴, and *L'Empire des cinq*²⁵. The company planned to target the young audience with the anime, although several series are in reality aimed to an audience of young adults. In fact, television broadcasters and VHS publishers hadn't really realised at this point that cartoons are not only for children, but can target a huge range of viewers; they didn't seem to worry about such distinction when it came to anime. So video editors tended to publish series regardless of the original target audience.

Incomplete Serie and Inaccurate Adaptation

For Canestrier, publishing anime in VHS was only a business opportunity, a way to monetise the rights of anime he had obtained. This is why he had not sought to expand the domestic video market or to better understand the expectations of the audience of children. The other companies also had seemed to consider that anime had fewer values than the films they broadcast, which explains the difference in treatment in children's programmes at the level of translation and adaptation. If movies were relatively well treated by Fil à Film, Japanese anime was more problematic and their publications were often poorly realised. Most of these VHS companies never published the entire seasons of anime. He only released the first three or four episodes on the same tape, although the cover of the cassette could mention "dessin animé de long métrage" (sic) which leads the buyer to think that he gets a full movie. If the first tapes registered a successful sale, then some

²² *Kurenai Sanshirō*, Tatsunoko Production, 1969.

²³ *Jungle Book Shōnen Mowgli*, Nippon Animation, 1989.

²⁴ *Cobra*, TMS, 1982.

²⁵ *Makyō Densetsu Akurobanchi*, TMS, 1982.

other episodes of the series were released on VHS. It was too risky to dub all the episodes and to broadcast them on VHS. This explains why *Candy* and *Goldorak* were the only anime that have been published in several videos cassettes by Canestrier.

The Japanese titles, often too long for the French conventions, were changed to suit the tastes of the public (or what the publishers thought were suitable for young audiences). Canestrier had two labels “vidéo jeunes” and “junior collection” and he renamed all the Japanese names and titles in order to make them less exotic²⁶ for the French audience. Hence, *Sengoku Majin Goshōgun*²⁷ became *Fulgutor, le robot des lumières* (literally “robot of lights”), *SF Saiyūki Starzinger*²⁸ became *Starzinger, les Chevaliers de l'espace* (literally “space knights”) and *Genki champion de boxe* is the French title of *Ganbare Genki!*²⁹. The French editor seemed to enjoy elongated titles with cheesy taglines to appeal to a young male audience. As with Canestrier, all these small publishers had a tendency to expunge the Japanese names and titles. Sometimes the new French title was far from the original, for example *Hi no Tori*³⁰ (literally “phoenix”) of Mushi Prod became *Les Vengeurs de l'Espace* (Literally “Space Avengers”) thanks to the VHS editor Cartoon video. The worst modified anime title remains *Nausicaä of the Valley of the Wind*³¹; it appears under three different titles *Warriors of the Wind*, *Le Vaisseau fantôme* (Literally “The Flying Dutchman”) and *La Princesse des Étoiles*

²⁶ This was a common practice in France. *Calimero*, *Barbapapa* and other series were produced in Japan but the French viewers were unaware, with all the Japanese names absent in the opening and ending.

²⁷ *Sengoku Majin Gōshōgun*, Ashi Productions, 1985.

²⁸ *SF Saiyūki Starzinger*, Tōei Dōga, 1978.

²⁹ *Ganbare Genki !*, Tōei Dōga, 1980.

³⁰ *Hi no Tori*, Tezuka Productions, 1980.

³¹ *Kaze no Tani no Naushika*, Topcraft, 1984.

(“Princess of the Stars”), with redesigned cover artwork and a tagline unconnected with the plot of the movie: “She promised to protect the future aboard the ghost ship.”. Moreover, the illustrations of the cassette cover were often poor copies of the original artwork redesigned by an anonymous artist.

During the first phase of the market development during late 1970s and 1980s, Japanese anime were mostly considered as cheap by-products³². The editor merely chose the series they published; they only picked the ones that were already broadcast on TV. Their editorial work mainly consisted in removing the Japanese titles and names and adding bad artwork on the cover. French editors hardly devoted time for the manufacture or the promotion of the titles. They seemed to not care about the real target of the anime, broadcasting them to a young audience. The television broadcasters shared this attitude toward Japanese series. Cartoons were mainly used to fill the gaps in the youth programmes at a lower cost. In both cases, the Japanese credits almost never appeared and dubbing was quickly made by actors, with little interest in the rendering of the episode.

In the early 1990s, most of these small publishers had collapsed and their stocks of cassettes were generally sold in the outlet stores. Even Fil à Film filed for bankruptcy in November 1993 with liabilities of 150 million Francs (approximately 23 million euros) (Williams 1993), leaving the home video market in the hands of film and television major

³² Among all these VHS editors, Scherzo Video was maybe the only independent publisher that has tried to broadcast anime movies with a real editor’s choice. One of whose leaders was the film director Christophe Gans and he attempted to market slightly more ambitious films like *Le Chat Botté* (*Nagagutsu o haita neko*, Tōei Dōga, 1969 — film released in 1983), *Princess Millennium* (*Shin Taketori Monogatari: Sennen Joō*, Tōei Dōga, 1982 — film released in 1985) and *Cyborg 009* (Tōei Dōga, 1980 film released in 1987).

companies. The disappearance of these first distribution companies allowed the emergence of new players.

In this first phase, videotapes are essentially used to make a profit on the rights purchased from series on television. Anime was not considered as a cultural product in its own right but as a very short-term source of profit; this is why the quality of the cassette and the time devoted to the adaptation are minimal, especially in comparison with the care taken for movie videotapes. The difference in prestige between the two genres (live movies, cartoons) could explain the difference in treatment.

Growing Phase: Non-Legal Exchange and Fans

VCR as Mainstream Product

In the late 1980s, 43.4% of households with television are equipped with VCR in France (Cotrel 1984). The installed base was large enough for the market to become mainstream. The French audience, who preferred buying tapes rather than renting them, greatly increased sales. Initially, the recording of television programmes for deferred viewing was the main use of video recorders (Flichy 1991, 115-116 and Arnal and Busson 1997, 954). Because of its purchase price, the VCR was originally a product for the classes with high incomes. In the early 1990s it had become one of the appendices of the television as trivial as the remote control (Mousseau 1991). In 1992, more than 11 million households were equipped with video recorders, accounting for 55% of the 21 million households with television (Alteresco 1994, 144).

Not only the public could record their programmes to watch them whenever they wanted, but in addition they could watch popular audio-

visual products from other countries thanks to the almost simultaneous circulation of media in the world market whether by legal or illegal means. As noted by O'Regan, "VCR provides opportunities for TV and movie producers in particular countries to take commercial advantage of their ethnic enclaves" (O'Regan 1991, 125). In France, some Japanese television programmes were available on videotape among the Asian diaspora through the video rental stores in Paris (in the 9th arrondissement for the Japanese and in the 13th for the countries of South East Asia and Chinese).

During the same period, French television broadcast an enormous number of anime creating an unprecedented infatuation for this type of entertainment. The increasing supply of cartoons in children's programmes had been compared to fast-food restaurants (Neveu 1990, 111). At the beginning of 1987, the creation of the TV show "Club Dorothée" on TF1, granted Japanese anime a larger place in the grid of youth programmes. The producer, AB production, rebroadcast the classic *Candy* and *Goldorak*, but he also released many new series such as *Dragon Ball*³³, *Chevaliers du Zodiaque*³⁴, *Nicky Larson*³⁵, *Ken le Survivant*³⁶, etc. The aim of these anime series was to counter the massive influx of series offered by La Cinq, the first privately-owned free terrestrial television network, which broadcasted anime already available in Italy as *Jeanne and Serge*³⁷, *Princesse Sarah*³⁸, etc. The truncated episodes, with the approximate or intentionally-false dubbing,

³³ *Dragon Ball*, Tōei Dōga, 1986.

³⁴ *Saint Seiya*, Tōei Dōga, 1986.

³⁵ *City Hunter*, Sunrise, 1987.

³⁶ *Hokuto no Ken*, Tōei Dōga, 1984.

³⁷ *Attacker You!*, Knack Production, 1984.

³⁸ *Princess Sarah*, Nippon Animation, 1985.

and the random episode-scattered broadcast pushed some amateurs to search for the source and manage to obtain Japanese anime videos without dubbing or subtitles thanks to the Asian video rental stores. The VHS tapes were duplicated and then exchanged or sold through meetings in front of Japanese bookstores or Asian shops. A lot of illegal copies were available for fan distribution³⁹. Early fans would pay for a new episode of *Dragon Ball* even if it was in Japanese and without subtitles. Minitel⁴⁰ also allows amateurs to discuss about anime and to exchange pirated cassettes. Some fans could also purchase imported videos tapes with English subtitles (Manga Video published them in the UK). Amateurs could find them in some stores that were specialised in comic books or video games. At that time, the Americans and the Japanese do not use the same types of coding as in France or England. It was possible to play the English tapes (PAL) on VCRs French (SECAM), but you required Japanese transcode video (NTSC) through special VCRs to make them playable on the French VCRs. That did not stop the fans from hacking as many anime as possible. These informal channels of distribution are also networks for information exchange and creation of aesthetic criteria to defend the anime. Amateurs gathered in associations and created fanzines to spread their word. For example, *AnimeLand*, a magazine specialised in cartoon and anime that is still available today, is originally a fanzine whose first issue came out in April 1991. Many fans who were involved in its launch subsequently become key persons in the manga and anime market in France.

³⁹ A similar non-legal distribution network could be seen in the US during the late 1980s (Eng 2012).

⁴⁰ Minitel was a videotext online service created in France and available from 1982 to 2012. At the high point, there were nine million Minitel sets installed in households around the country, an estimated 25 million users, and 26,000 services on offer.

Long before anime VHS were sold in shops specialising in manga and anime, fans were able to obtain the anime they appreciated in other ways. The anime VHS market therefore existed, but it was mostly non-legal. None of the big publishers were aware of it and no marketing department was able to target it properly. Fans were then responsible for creating themselves a publishing house and a distribution circuit.

Amateurs Becoming Professionals

The anime enthusiasts who grew up with *Goldorak* and *Candy* were old enough to create their own anime broadcasting companies and they were willing to change the perception of anime among the general public. Among them, Pascal Lafine quickly took the role of "manga specialist" of the magazine *Club Dorothée Magazine*. He managed to convince AB Productions to release two new anime for an adult audience: *La Cité interdite*⁴¹ and *Crystal Triangle*⁴². Both OVA (Original Video Animation, cartoons products for the market of home video) are published by Dagobert Video, which also publishes other series broadcast on TF1. It was the first time a fan had made an editor's choice and managed to release an anime that hadn't been previously broadcast on TV. Unfortunately, the mainstream audience was not ready for this type of OAV and the few sales go through *AnimeLand*, which proposes to members of Animarte, association managing the fanzine.

In 1993, the Animarte association offered SECAM videotapes of the OAV *Bubblegum Crisis* subtitled in English. With this success, some members founded a company to buy and distribute Japanese series:

⁴¹ *Yōjū Toshi, Madhouse, 1987.*

⁴² *Kindan no Mokushiroku Crystal Triangle, Animate, 1987.*

Anime Virtual. Cédric Littardi and Gregory Parcollet created the firm with their own funds and managed to convince a Japanese publisher to sell them the rights of another OAV – *La Légende de Lemnear*⁴³. The title was released in March 1994 and the sales were good enough to comfort them in the publishing for the VHS market. Odaje, the company who created the subtitles, was originally a fans association well known for making subtitled films for screenings at conventions. This first release of an OAV by two start-ups composed of anime fans was a bit laborious, but it raised their credibility for other broadcasting on VHS. French anime fans were also pleased by this title because it was subtitled so they could listen to the Japanese voices. French dubbing of anime on TV was so faulty that many viewers demand series with subtitles and no dubbing. The ex-fans became entrepreneurs and started Kazé Animation, a new editor formed by the association Anime Virtual and the Japanese company Ucore (firm in charge of sales of anime rights in Europe). In September 1994, Kazé launched its first VHS in manga stores, whose number had increased in Paris and all the big cities in France. The six OAV of *Chroniques de la Guerre de Lodoss*⁴⁴ represented a first real commercial success for the firm. 150,000 units were sold⁴⁵. That achievement fostered other amateurs to build their own company and contributed to enhance the key role of fans in the market. Now they had their magazines, their publishers and they were intended to supersede their ideas over those of mainstream publishers.

⁴³ *Legend of Lemnear Kyokuguro no Tsubasa Valkisas*, AIC, 1991.

⁴⁴ *Lodoss tō Senki*, Madhouse, 1990.

⁴⁵ Interview with Cédric Littardi, November 2014.

Kazé continued its editorial strategy of original anime VHS with original subtitled version as *Iria*⁴⁶ and the anime of the Pioneer catalogue (*Tenchi Muyo!*⁴⁷, *Moldiver*⁴⁸). Of course, only fans buy anime in original subtitled version promoted through specialized press. In an attempt to reach a wider range of viewers, Kazé also launched a dubbed version of *Kojiro*⁴⁹ in French. And to get some more money, created an erotic label: EVA (Erotic Video Animation). Meanwhile, the publisher had team up with UGC⁵⁰ in order to broadcast anime on theater during the summer. Its programme Cinémanga cycle was composed of eight feature films never released in French cinemas before. After a long period of screening in the UGC Cinemas complex in Paris, the Cinémanga cycle went on tour throughout France. This was not a commercial success but it allowed Kazé to build an image of reliability and quality, while promoting a different vision of Japanese animation. Only 20,000 tickets were sold in France with more than 8000 in Paris. It must be said that the selection includes lots of old movies and that there were few explanations for an uninformed audience.

While the fans were becoming more professional and larger publishers remained skittish, other entrepreneurs went into this new business. For example, Francis Amato, founder of IDE (International Electronic Distribution), was the founder of a company that imported Japanese by-products (video games, posters, goodies). After the installation of Japanese publishers in France, he stopped his video-games sales to focus on selling goodies. Following the very strong

⁴⁶ *Iria: Zeiram the Animation*, Ashi Productions, 1994.

⁴⁷ *Tenchi Muyo! Ryo-Ohki*, AIC, 1992.

⁴⁸ *Moldiver*, AIC, 1993.

⁴⁹ *Fūma no Kojirō*, Animate Film & J.C. Staff, 1989.

⁵⁰ UGC is major film production and Distribution Company, which aired *Porco Rosso* in April 1995.

demand for products derived from the anime *Dragon Ball*, he contacted AB Productions to buy the movies rights. At that time, the company producing the show *Club Dorothee* had not really perceived the importance of the market for anime home video. Besides the failure of the 1991 OAVs launched by Pascal Lafine, the company was scalded by the poor sales of a video tape composed of three movies of *Dragon Ball*, with was made with TV episodes and movies to make a transition between stories. However, AB Productions had already made the translation and dubbed the movies. So the firm decided to sell them to Amato's company. The label AK Video was then created to broadcast four *Dragon Ball Z* movies. The sales volume was incredibly large despite the fact that supermarkets refused to sell them. In fact, the sales figures of the first videotape released by AK Video in September 1994 were so good that AB Productions and TF1 began to plan other anime VHS releases⁵¹. Subsequently, IDE was hired by these major companies in order to create the editorial content. It also was in charge of the sales in specialised stores. AB Productions was responsible for the creation and distribution of its anime VHS catalogue via supermarket. AK Video also started to negotiate directly with the Japanese rights holders in order to publish other original series as the OAV *You're Under Arrest*⁵² or *Black Jack*⁵³. In order to build a collection of series, which could attract the fandom, Francis Amato has hired Olivier Fallaix as editorial director. He was journalist for *AnimeLand* and an anime fan who had created the first radio show about anime. He had been in Japan in order to select series in order to publish them in a way that could appeal to the

⁵¹ Interview with a former TF1 employee in December 2014.

⁵² *Taiho Shichauzo*, Studio Deen, 1999.

⁵³ *Black Jack*, Tezuka Productions, 1993.

amateurs. Whereas AB Productions, which had distributed dubbed anime VHS for the mainstream market, AK Video published subtitled anime for the hardcore market. Again, the company Odaje created subtitles. Fans praised the quality of these anime but the sales were not good enough to turn the editor in a big firm⁵⁴.

The strategies of the fans were completely opposed to those that were adopted beforehand. Instead of selling videotapes with a few episodes and never broadcasting the end, the new companies offered complete sets. Instead of dubbing the series, they put subtitles. Instead of marketing the fashionable series on television, they sought to extend their catalogue by going directly to Japan to negotiate the rights of unpublished anime. Despite their network and their commitment, they struggled to reach the mainstream market because subtitled series were less easy to access than dubbed titles and because their anime lacked media visibility. What really made AK Video a prosperous VHS publisher were the sales of older series previously broadcast on national TV as *Cobra*, *Albator* and *Les Mystérieuses cités d'or*⁵⁵. Previously shown on television, these series have both a French dubbing and a significant reputation among the mainstream audience. AK Video is the first publisher to release all the set of episodes, contrary to what is practiced in the 1980s. That was a way to satisfy the hardcore fans (that were longing for a complete set of episodes) and the mainstream audience (which remembered the anime with nostalgia).

During this second stage of development of the market, by becoming professionals, amateurs have introduced new work procedures:

⁵⁴ Interview with Olivier Fallaix (former AK Video employee) in December 2014.

⁵⁵ *Taiyo no Ko Esteban*, Studio Pierrot, DIC, 1982.

publication of all the episodes, subtitling in place of dubbing, creation of catalog with new series not previously broadcasted on television. All these steps aim to give added value to the VHS product but the niche market is too small to make the investments really profitable.

Maturity and Decline of the Market: Multiplication of Publishers

The success of Kazé and AK video attracted other companies to the market. Between 1994 and 1997, many companies were founded by amateurs or by shop owners. For example, two Parisian bookstores created their own video label. The specialty store Tonkam launched its own manga publication label in 1994. In order to obtain the rights of the OAV series *Ah! My Goddess*⁵⁶, it had to release two minor titles to be credible with Japanese right holders: *Yokho chasseuse de démons*⁵⁷ and *Ushio et Tora*⁵⁸. The Parisian store Katsumi preferred the acquisition of anime rights that were cheaper and more profitable in the short term. The Katsumi Video label was specialised in erotic anime as *Shin Angel*⁵⁹. A small wholesaler of video games had also tried to become a VHS publisher. He created the Dragon Video label and released a few minor titles. The film Editor, René Chateau Video, despite the failures of the beginning of the decade, also released a series anime in 1995, *Robin de bois*⁶⁰. But it remained far from growing sector. Finally, among the publishers who engage in the market, we find the Huchez family that had provided many Japanese series on French television through their company IDDH. It has created IDP (Innovation Diffusion Production) in

⁵⁶ *Aa! Megami-sama*, AIC, 1993.

⁵⁷ *Mamono Hunter Yōko*, Madhouse, 1990.

⁵⁸ *Ushio to Tora*, Pastel, 1992.

⁵⁹ *Shin Angel*, Pink Pinapple and Triple X, 1994.

⁶⁰ *Robin Hood no Daibōken*, Tatsunoko Production, 1990.

1996. After some erotic anime VHS derived from manga *Visionary*⁶¹ by U-Jin, this new publisher essentially released the 1980s anime series previously broadcast on television.

Thanks to the huge success of *Dragon Ball Z* VHS, more traditional players entered in the market of anime videotapes. Media and home video professionals were then focused on those Japanese anime that could drain a large audience. Distributed by the PFC interest group (Pathé, Fox, Canal +), giving it a wide distribution for two years, the English publisher Manga Video arrived in January 1995 after several years of broadcasting in import through specialised shops. While about fifty anime VHS were published in the previous decade, from 1995 the sales of videos tapes went through the roof and the booming market was growing rapidly. Manga Video released several titles a month and they were dubbed into French in order to reach a larger audience. AB Productions joined the market and created two labels for marketing VHS: “Manga Video Power” for specialty shops and “Shuriken Video” for mass distribution. IDE advised the company in editorial choices and kept on specialised distribution outlets.

The excitement around what the French mainstream media call “manga”, although the term is inappropriate in the case of animation, could explain why so many new publishers emerged since 1994. The problem was that they all wanted to make profit in the short term and their mass publication of tapes quickly caused saturation in the emerging market. At that time, subtitled anime VHS were sold between 2,000 and 5,000 units⁶². With dubbing, sales were easily doubled. When

⁶¹ *Visionary*, Beam Entertainment, Knack, 1995.

⁶² Interview with Olivier Fallaix, December 2014.

the series was popular, they could even reach 100,000 units. But these cases are rare and mainly related to those previously broadcast on national television. The nostalgia played an essential part in their success.

The other consequence of the huge number of new VHS publishers was that the broadcasting rights became much more expansive than they were formerly. They rose sharply, due to high demand from the foreign market. In the 1980s, Japanese producers were unaware of the business potential of the French market. It must be said that they were blind to the real success of anime in France. So, when Go Nagai had finally become conscious of the success of *Goldorak*, a dozen years later thanks to trip to France, he sued Tōei Animation. The Japanese companies then adopted the opposite attitude: extreme distrust of Western intermediaries and overestimation of potential sales. In the 1990s Japanese producers were a little more aware of the French market since a lot of French publishers regularly came to visit them in order to acquire the rights of anime series. Furthermore, French fans were better informed by numerous magazines and they were more demanding in terms of quality of translation, dubbing and distribution, hence why VHS publishers couldn't be as neglecting as they were in the previous decade.

The multiplication of publishers, the low pricing strategy and the reduction of margins, the rise in costs related to the purchase of rights and the saturation of the market explain the quick collapse of the market in 1997. The situation was worsened by the disappearance of anime on

television channels⁶³, which were a form of advertising for their VHS counterpart.

Moreover, since the market of audio-visual equipment had reached maturity, manufacturers were prompted to look for a new growth relay with another video format. Since 1994, the market for audio-visual equipment was bleak and the volume growth of video recorders markets was insufficient to compensate for the general downward trend in prices (Busson 1997, 926). In 1997, 96% of French people aged 15 and over owned a television set in their home (Donnat 1998, 69) and 54% of the video libraries were composed of cartoons of children's programmes.

Crisis of Anime VHS and Change of Medium

In just two years, the anime VHS sector was fully saturated and several small publishers gave up, failing to maximize their investment in the purchased licenses. Tonkam refocused on its manga publishing business. Katsumi stopped the video label. For its part, Kazé must have been restructured following the bankruptcy of one of its founders (Ucore) and a new company (Kazé SA) retrieved the catalogue exploitation rights. But the situation did not improve and the founding members had left the company, which went through hard time before re-emerging during the explosion of the DVD market. The sales figure of anime VHS were still important so AB Production kept on publishing

⁶³ La Cinq has stopped broadcasting in 1992. For its part, AB Productions had reoriented its business towards the production of sitcoms and continued to invest in animated. Besides the company stopped the production of Club Dorothée despite its success in order to avoid the negative reviews of the general public and the media censor, CSA (Conseil supérieur de l'audiovisuel). Created in 1989, this French institution regulates the radio and the television, supervises the attribution of radio frequencies and television channel. It could also censor programs.

series that were previously broadcast on their TV show, such as *Nadia, le secret de l'Eau Bleue*⁶⁴, *Très cher Frère*⁶⁵, and *Saint Seiya Poseidon*⁶⁶. But the company did no further investments in the acquisition of new licenses⁶⁷. Since it had aimed too fast and too high, Manga Video had to deal with a lot of unsold tapes that have later been "recycled" on newsstands with the publication titled *Manga Mania* (a cheap magazine packed with a VHS). From September 1996, all the catalogue of Manga Video had been sold off at the low price of 69 francs (about 10 €), which added up to the market saturation. The publisher disappeared from the market and the broadcasting rights of the series were held by its parent company, PolyGram. Thereafter, the catalogue of titles held by Manga Video reappeared in the show *Manga Manga* on the TV channel Canal Plus. But at that time PolyGram has no intention of buying new licenses since it was preparing its purchase by Seagram. Another publisher carried out VHS price dumping: AK Video. It was not able to acquire new titles; it had been forced to publish back catalogue licenses such as *Humming Bird*⁶⁸ and *Princesse Minerva*⁶⁹. During this period, AK Video also sold its VHS box at knockdown prices. The audience was contented, but this method was deleterious to other publishers. It then became more difficult to sell VHS tapes and to maintain their profit margins. Competition became even rougher when Manga Distribution, the main VHS dealer and wholesaler, pushed the publishers to broadcast more cassettes at distressed prices. Originally specialised in video games and

⁶⁴ *Fushigi no umi no Nadia*, Gainax, 1990.

⁶⁵ *Oniisama e*, Tezuka Productions, 1991.

⁶⁶ *Saint Seiya Poseidon*, Tōei Dōga, 1988.

⁶⁷ At that time AB Productions was trying to launch its bundle of satellite television channels (AB Sat). Moreover, AB Productions kept on broadcasting Japanese series on its channel Cartoons.

⁶⁸ *Idol Bōeitai Hummingbird*, Ashi Productions, 1993.

⁶⁹ *Princesse Minerva*, Toho, 1995.

accessories import, Manga Distribution grew into the key company of the anime home video segment. Since the publishers had difficulty supplying the market, the company created its own video label in 1999, Déclic images. It adopted an aggressive pricing practice likely to result in an increase in its market share. It sold complete sets of episodes at low prices: *Silent Moebius*⁷⁰, *El Hazard*⁷¹...

As a result of the very difficult market, companies became more cautious and almost all of them only published series already broadcast on television. There were three exceptions. The first one was Manga Video (Polygram), which launched *Macross Plus*⁷², *Bounty Dog*⁷³, and *Vampire Princess Miyu*⁷⁴. The second one was Dynamic Visions. This publisher, based in Belgium, was a subsidiary of an Italian company founded in 1995 by Frederico Colpi (journalist specialised in manga) and Takeshi Nagai (elder brother of Go Nagai). Dynamic Visions is a subsidiary of Dynamic Japan established in 1969 in Japan. The company aimed to promote and sell the works of Go Nagai and other Japanese licenses. The direct link with Japan enabled the Belgian publisher to release high quality titles in France, such as *Evangelion*⁷⁵, *Escaflowne*⁷⁶, *Serial Experiments: Lain*⁷⁷, *Cowboy Bebop*⁷⁸, *Utena*⁷⁹... VHS were both subtitled and dubbed, ensuring the publisher a strong reputation among the fans. To recover the costs of publication and dubbing, broadcast

⁷⁰ *Silent Moebius*, AIC, 1991.

⁷¹ *Shinpi no Sekai Eru Hazādo*, AIC, 1995.

⁷² *Macross Plus*, Studio Nue, 1994.

⁷³ *Bounty Dog*, Animate, 1994.

⁷⁴ *Vampire Miyu*, AIC, 1988.

⁷⁵ *Shin Seiki Evangelion*, Gainax, 1995.

⁷⁶ *Tenkū no Esukafurōne*, Sunrise, 1996.

⁷⁷ *Shiriaru Ekusuperimentsu Rein*, Triangle Staff, 1998.

⁷⁸ *Cowboy Bebop*, Sunrise, 1998.

⁷⁹ *Shōjo kakumei Utena*, J.C. Staff, 1997.

rights were also sold to TV channels (Canal +, Game One, Mangas). Another Japanese firm also decided to enter in the French saturated market at the end of 1990s: Toei Animation. Besides the releasing of oldies as *Le Tour du Monde de Lydie*, it tried to launch new titles: *Magical Doremi*⁸⁰, *Ken 2*⁸¹, *Slam Dunk*⁸²... The quality of dubbing did not convince the fans and the mainstream audience was not interested by these anime. Even if the *Slam Dunk* series was adapted from a bestselling manga, its complete set of episodes had never been published due to poor sales.

The anime VHS market was rapidly restructuring since the crisis of 1997. After having flooded the market, most of the remaining editors had to change the technology used for home video in order to create a new crave for consuming Japanese series. This technology shift corresponded to the practice of the rest of the home video market. DVD is one of the most rapidly adopted technologies in the history of publishing (Tellier 2006). The first DVD videodiscs were marketed in 1996, first in Japan, then in the rest of the world, and almost completely replaced VHS and laser discs. In 2001 revenues of videodiscs surpass those of VHS tapes in the USA (Delapierre and Mytelka 2003, 238). Besides Canal + which released the DVD of *Porco Rosso*⁸³, AK Video is the first to release an anime on DVD with *City Hunter – Services Secrets*⁸⁴ in 1999. All the publishers have quickly followed AK Video and VHS sales dropped and since 2003 this video format is no longer used (Beldi 2013, 5).

⁸⁰ *Ojamajo Doremi*, Toei Animation, 1999.

⁸¹ *Hokuto no Ken 2*, Tōei Dōga, 1987.

⁸² *Slam Dunk*, Tōei Dōga, 1993.

⁸³ *Porco Rosso*, Ghibli, 1992.

⁸⁴ *City Hunter: The Secret Service*, Sunrise, 1995.

But the media change is not enough to boost sales and the remaining editors kept their aggressive pricing practice, which had previously led to the 1997 market crisis. The same causes have led to the same consequences: the anime DVD market has rapidly been saturated. Moreover the low prices of the complete box of episodes in DVD or VHS have damaged the image of anime. Neither the fans nor the mainstream audience are ready to pay for an episode at their real price. Furthermore, since the anime are henceforth digitalized, it has become almost effortless to make and distribute pirated copies.

In two decades, the anime VHS has shifted from the status of by-product for children to cultural product for an audience of adolescents and adults. The evolution of the videotape market shows that the film cassettes and the niche of the cartoon developed differently because of the difference of prestige. During the first phase, anime were deprived of most of their episodes because of the cost of publishing. During the second phase, the intervention of the amateurs, who became professionals and formed the market they have largely helped to create. They introduced different work procedures and tried to increase the perceived quality of the product by proposing better translation, better dubbing or subtitling and better distribution. The complete series are now available and the Japanese names of the crew are shown in the credits. However, legitimisation of anime as an art form is not yet complete. The discount pricing strategy of the publishers is partly responsible for the tarnished image of anime as cheap cultural products. The viewers are less and less willing to pay full price with illegal copies

sometimes easier to obtain than legal ones. At the end of the 1990s, the cost remained high but the price dumping of publishers in order to sell on mass encouraged the consumer to believe that it was negligible. Today the price of the complete series on DVD is still much lower than that which is practiced in Japan, which may give the impression that the product has little value. Once this damaged image settled, it is difficult to raise the perceived value and the price of the product.

In the 1990s the domestic video market was favoured by the involvement of fans in the creation of information network and in the formation of publishers. But the current market is threatened by the non-legal activities of new fans that unlawfully broadcast series on online platforms competing against legal platforms. Today in France, publishers have not yet found a way to counter these broadcasting networks. They may need to develop long term strategies in order to reach an audience not limited to the anime fans and to create a positive image of the product while ensuring a satisfactory adaptation work that differs from the non-legal practices of fansubbing. The problem is difficult to solve, but it is essential for the development of the home video market and for the perceived quality of anime.

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