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THAI ANIMATION AT A CROSSROADS

Abstract:

The research was to study Thai animation industry in order to lay out a solid foundation and to compete in the global market. The research was a qualitative research based on interviews of key persons from its industry and government sectors, related research and articles and observation data. The research was analyzed by tracing back the development of Asian animation and particularly looking into the success story of Japanese animation in a global market. The study showed that Thai animation still lacked the unique style of production to attract global viewers. To spearhead and strengthen Thai animation, several factors including a robust government policy, international partnership, marketability, financial support and related industry and associations kept the industry competitive.

Keywords:

anime, digital content, competitive, animation, characters

I. Introduction

As a result of rapid technological advancements, the digital content is growing rapidly worldwide. Digital content industry is broadly defined as products or services that use information technology to digitize and integrate media materials covering a wide range of applications in film, game, music, education or even animation. Moreover, digital content and digital media has brought the new frontier to different sectors as journalism, entertainment, education, publishing, advertisement or even politics.

Animation in Asia and the Pacific provides the first continent in production, distribution, exhibition, aesthetics and regulation. Animation in Asia and the Pacific also offers vignettes of the fascinating experiences of a group of animation pioneers [1]. However, animation history in Asia embarked upon its journey in the 1940s which was remarkably influenced by Western studios particularly The Walt Disney. Several Western animation titles and comic books spread throughout Asia such as Scooby-Doo, Snow White and The Seven Dwarfs, Looney Tunes, Tom and Jerry, Popeye, Garfield, the Adventures of Tintin and Marvel Comics [2]. Later in 1960s, production in Asia was attractive to Western investors by outsourcing to Japan, Korea, Taiwan, Philippines, Thailand, China and India after Asian animators have been trained abroad.

The leading country of Asian Animation in a global market is certainly Japan. Japanese animation has become globally recognized especially in Asian nations like Taiwan, Hong Kong, Thailand, Malaysia, Singapore, Philippines and India. Japanese animation so-called anime enjoys a tremendous popularity in Asia where it has become a mainstream youth culture due to cultural and geographical proximity [3]. There are more than 150 Japanese TV animated series which have been screened. Pokemon has first created a global craze and was extremely popular among small children in South East Asia following Dr. Slump & Aralechan, Sailormoon, Slam Dunk, Detective Conan, Saint Seiya, Dragonball, Crayon Shinchan and Pocket Monster. Further, Japanese animation titles have been translated in several languages including Portuguese, Korean, Mandarin, Hokkien, Cantonese, French, Germany, and Spanish since Anime has become popular worldwide not only in Asia but also in the West especially Germany, France and Italy. It can be said that Japanese animation has paved the way for many countries to produce more work and skilled animators as well as inspire people. As the result, Japanese cartoon lovers have been spread throughout the world by setting up associations.

Since 2005 Animation in Korea started to gain national and international recognitions because Korean government launched a robust policy to strengthen digital content industry in terms of subsidy, R&D, human resource development and international marketing [4]. More interestingly, quota policy has helped boost the industry especially domestic demand. Remarkably, the introduction of Korean rich culture and creativity has become strongly successful worldwide by the strong support of government agency so-called KOCCA to nurture and foster the content industry into a global leader of creative economy. However, Korean animation industry is not as rampant as game but Korean animation industry has been able to lure international partners around the world in terms of co-production and venture capital.

Malaysia is another country that has a strong government vision. Multimedia Super Corridor (MSC) was emerged in 1996 to the vanguard of digital content industry. The increase of emerging media and foreign investors has changed the entire of Malaysian animation industry [5]. Though animation styles and techniques have been confined to the classical tradition, more research and development on alternative methods on character design and animation have been implemented to make Malaysian animation more competitive in a global market.

It cannot be denied that Singapore is the global trading center. Internationalization has made Singapore strongly develop. In 2003, Media Development Authority (MDA) was formed to strengthen the media industry. More importantly International co-production treaty with several countries as Canada, Thailand, France, New Zealand, Japan, Korea, China and Australia helps facilitate the animation industry to move forward stably [6].

The Indian animation industry, which was worth USD 493 million in 2008 reached USD 1 billion by 2012 by having been divided into animation entertainment, customized content development, VFX and animation education [7]. Notably Indian animation became a global outsourcing hub by providing animation production services as well as developing a robust domestic market. It is mostly because India like China has the advantage of mass population. No language barrier can be found compared to other Asian countries.

China is considered as one of the stronger players in the animation outsourcing industry. The continued development may strengthen their position as one of the leading provider of outsourced animation services in the near future. China’s strength maybe attributed to the availability of good infrastructure and strong government support especially a quota policy of content industry. China’s promotion of its anime sector moved into high gear in 2004 because Chinese government campaigned to prosper socialist culture [8]. The objectives were to force culture and economic socialist market economy and satisfy the increasing mental and cultural needs of the people.

The emergence of Thai cartoon can be traced back since King Rama II as mural paintings and it flourished as the golden age after WWII. More caricatures in the rein of King Rama VI. The father of Animation “ Payut Ngaokrachang” has shined Thai Animation by introducing The Adventure of Hanuman (1957), and The Adventures of Sudsakorn (1979). Twenty five years later, Thai animation industry increased tremendously, several animated films launched by the leading company Kantana in producing Khan Kluay (2006) [9]. After that more animated films were produced including Life of Buddha (2007), Nak (2008) and Yak (2012). The Thai animation industry has experienced strong growth and valued around USD 200,000 but most are imported one especially from Western and Japanese studios. Most popular western films includes Kung Fu Panda, Shrek, Mulan, Lion King and the Borrower while animated TV series mostly has arisen from Japan including One Pience, Doraemon, Ultaman, Naruto, Detective Conan. Animated TV series for both Thai and imported cartoons were on air through the free TV on channels 3, 5, 7, 9, 11 and Thai PBS including satellite or cable TV [10]. Thai cartoons are not that popular due to storytelling and character design.

As Niracharapa (2014) mentioned on the competitiveness of Thai animation, a lot of world class companies invested in Thailand due to labor intensive, quality of work and low cost of living but most parts are on production [11]. Moreover, some Thai companies have gained international recognitions such as Kantana, the Monk, Shellhut, Imagimax, Imagine Design, True spot, Vithita Animation and G motif.

However, most animation production houses mostly geared toward domestic market much more than international one which the market is too small. Intellectual property is also an existing problem based on international point of views.

The establishment of government agencies from Ministry of ICT, Ministry of Culture, and Ministry of Commerce has helped facilitate animation companies in terms of marketing and funding as well as infrastructure. More related associations have emerged to cluster digital content enterprises such as TACGA, TDEC, DCAJ, and TGA.

Due to the high trend of market demand of a global digital content industry, there is considerable potential for growth specifically in export services in the animation industry. The overview of Thai animation industry grow continuously arisen from key drivers such as the establishment of more government agencies and animation associations and outsourcing services. Another driver of the animation industry in the rise of BPO industry in Asian countries and Thailand has been placed in the global outsourcing destination [12]. The inherent creative talent pool found in Thailand is also a driving factor for the animation industry from such countries as England, Japan, China, France and USA. However, factors inhibiting the growth of animation sector may be attributed to the shortage of skilled labors, financial investment, marketability and continuity of government support.

II. Discussion

The purpose of this study was to analyze Thai animation industry opportunity in a global market. The research used qualitative methodology based on interviews of key persons, related research and articles and the success story of Japanese animation in a global market as a guideline of Thai animation. The outcome of the research may help Thai animation studios and government agencies see the adaptations for change of the industry to move forward.

Market Survey

Thai animation sometimes was classified by its target demographics but most productions have been focused on small children. Market survey to serve domestic demand before production is rarely done which has made Thai animation domestically unrecognized. However, Japanese animation always has a market survey in the areas of age and manga titles to serve the needs of different age groups and sexes ranging from 0 year-of-age to adult. Japanese animation productions have mostly chosen well-known or best seller comic books to ensure their popularity. Thai animation are mostly based on Thai folklores and national history.

Japanese character design has the uniqueness with big eyes but not all have this. Characters of Japanese animation are shaped with sensuality and most are 2D animated. Facial expression were very strong to depict different emotions. Thai animation productions have produced mostly 3D because it has been influenced by most Western studios. The Thai animation has focused on rich Thai culture so-called Thai-ness with hairstyle topknot and Thai costume of countryside.

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Storytelling and Knowledge Latency

The story telling of Thai animation is always a problem since it is hard to attract young kids except Pangpond from Vithita Animation and Khan Klauy from Kantana Company which character really inspires children to become a hero. Thai character is also difficult to gain more international attractions. Genre of Thai animation is limited mostly focusing on ghost and fantasy story compared to Japanese ones which are on action, sport, fantasy, sci-fi or even magic. The story of Japanese animation titles are based on popular manga or comic books. Both Japanese and Thai animation titles convey moral messages and knowledge latency to produce positive attitudes to young children.

TV Systems and Programming Slots

Programming slots and air time for Thai animation are the biggest problem because most are for Western and Japanese titles. Thai animation industry therefore has small opportunity to develop and flourish. Programming slots to some extent have had impact on the popularity of Thai animation.

Low Cost

Production cost of animation in Thailand is lower than many countries compared to Japan, Korea, or Singapore. However, Japanese animation can be sold cheaper because of worldwide market. The number of Japanese animation titles are three times much more than Thai ones. Around 40-50 featured films are produced yearly compared to none in Thailand.

Government Supports

Several Asian countries have strong government supports particularly Korea, Singapore, Malaysia, Japan or even Thailand. Tax holidays are almost the same but Thailand has limited way of supports. Eight year tax holidays for digital content companies and business matchmaking are good supports for the industry but financial supports in terms of venture capital are limited to be able to boost the industry. Quota policy which has been successful in China, Japan, Korea has never been found in Thailand to boost domestic demands. Small subsidy and the discontinuity of government policy also inhibit Thai animation industry.

Intellectual Property

It is difficult for Thai animation to expand the market internationally with their own IP since most of the work are more on outsourcing from the West or Japan. Values creation from IP are not prevalent in Thailand. To create more values, co-production and licensing business are the best way for Thai animation industry.

III. Conclusion

The opportunity for Thai animation industry in a global market remains high with a strong players, the quality work and creative talent pool. Challenges need to address to be able to meet the industry potential and level-off threats. The fast adaptations for change of the industry and government policy spearhead the industry in the global market.

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