Università
Ca'Foscari
Venezia

Master's Degree programme

in Language and Civilisation of Asia and Mediterranean Africa

Final Thesis

The Impact of the Japanese Publishing Industry Abroad

Cultural Perspectives of the Growing Interest in Japan in recent years

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Academic Year
2023/2024

要旨

「漫画は世界にどのような影響を与えているのか？漫画は世界的な市場をどのように形成し、現代社会において文化的にどの影響を及ぼしているか？」。この論文は、この話題を含む様々な質問に答えることを目的とする。

本論文では、日本のメディア製品、特に漫画などの文学作品が、特にイタリアと日本を中心にした世界的な出版市場に与える影響について検討する。この情報をもとに、本論文は現在の漫画の世界的な人気がもたらす文化的な影響について考察することを目的としている。本論文の研究課題は、「近年、漫画はイタリアと日本の出版産業にどのような変化をもたらし、若い世代にどのような文化的影響を与えているのか」という問いである。

この目的を達成するために、本論文では、イタリアの出版市場と日本の出版業界の枠組みについて概説し、その後、近年に起こった変化を明らかにします。論文では、イタリアにおける日本の文学作品の歴史的な軌跡を研究することにより、常に進化する文化的、社会的背景とのつながりを探る。この論文では、イタリアと日本の出版業界の最新の市場データを取り入れ、過去の五年間の販売動向を解き明かす。そして、今世紀初頭からの日本の市場の変動を紹介し、現在業界が直面している課題についても議論する。またこの論文は、文化的・社会政治的戦略を分析することにより、漫画がどのようにして世界における日本の象徴となったのかを指摘する。本研究論文では、イタリアと日本の読者を対象に実施した調査と併せて、日本の文学作品に対する海外の読者の意見と、それに伴う認識の変化を紹介する。最後に、この研究は、パンデミックがメディア消費に与えた影響を明らかにし、漫画が促進した異文化交流についての洞察を提供することを目指している。

本研究論文は、三つの章から構成されている。

第一章は、イタリアの出版業界に焦点を当てている。まず、出版業界の仕組みと他のヨーロッパの市場との関係性を紹介し、次にイタリアの漫画の歴史について論じる。最後に、海外フィクションおよび漫画市場の状況と、日本の文学作品が最近の傾向にどのような影響を与えたかを分析する。

第二章は、日本の出版業界に焦点を当てている。初めに流通ルート、法的枠組み、広告費について簡単に紹介した後、メディアミックスの話題や 2019 年以降の漫画市場の変化について論じる。さらに、書店の現状と漫画の海賊版の問題について議論する。

第三章は、漫画の文化的および社会的影響に焦点を当てている。「Cool Japan」政策と歴史を描くために漫画がどのように使用されてきたかを紹介した後、この章ではイタリアと日本の読者を対象に実施した二つの調査の結果を示す。この章の最後では、電子書籍リーダーやストリーミングプラットフォームの台頭、ソーシャルメディアの書籍消費への影響など、パンデミックが一般大衆やメディア業界に及ぼす影響について議論する。

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Introduction

The starting point for this research paper was the observation of a growing trend in editorial production focused on various aspects of Japanese culture. Specifically, the research was born with the intention of quantifying the volume and popularity of such publications in Italy and the rest of the European continent. Furthermore, having as a future objective the acquisition of a position within the editorial system, and a personal interest in its operations, this study aims to explore the general internal mechanisms and dynamics of the industry. Given my humanities studies background, my interest extends to contemporary cultural and social dynamics. Specifically, this research paper aims to investigate the growing popularity of Japanese novels and comics, exploring whether publishers' decisions to release content from and about Japan stem from a desire to promote specific themes, or are a response to preexisting public demand. Furthermore, the thesis intends to explore the social changes that have occurred in recent years at a global level, driven by the spread of Japanese literary products, supported by surveys conducted with Italian and Japanese audiences and the latest market data available.

The research question at the centre of this paper is: "How have manga transformed the Italian and Japanese publishing industries in recent years, and what is its cultural influence on younger generations?". Throughout this study, possible answers to this and other questions will be presented.

This thesis is divided into three chapters, each organized into macro-sections to explore various topics more in detail. The first chapter focuses on analyzing the current state of the Italian and European publishing markets. More specifically, the first chapter discusses market dynamics and the growing popularity of Japanese publications, the historical aspects of comic books in Italy, as well as their current market trends in the Italian panorama. The second chapter shifts the attention to the Japanese publishing industry. It examines the distribution mechanisms, legal framework, and advertisement expenditure. It also explores the interplay between different media sectors and provides an overview of market data for manga in Japan from 2019 to 2024. The chapter concludes by discussing the challenges the industry faces, such as the decline of bookstores and content piracy. Chapter three investigates the cultural influence of manga and Japanese literature in the world. Through surveys conducted with readers and fans in Italy and Japan, it explores the cultural

perspectives and the role of comics in society, for instance, in portraying Japanese history and traditions. It also analyses the demographics of younger consumers and the relevance of social media and streaming platforms on the growing interest towards Japan. Finally, it discusses post-pandemic changes within the industry and potential future developments.

By collecting and analysing market data from the Italian publishing industry, this thesis aims to quantify the extension of Japanese literary products in the local and international panorama. Therefore, its target is to provide an answer to how much manga have transformed global markets. Additionally, by comparing the history of comic books in Italy, with the answers collected from Italian readers through the survey, it will be possible to trace the evolution of manga's perception in the country over time. Then, by analysing the structure of the Japanese publishing industry, this paper aims to shed light on its structural development through time, the current challenges it faces, and the results of government efforts in promoting its products globally. Illustrating its mechanisms will help understand how manga have become the symbol of Japan's soft power, and consequently, the influence it exerts on the perception of Japanese culture abroad. Through a survey conducted with Japanese readers, the thesis will verify consumption patterns, as well as discuss the public's opinions on the representation of Japanese culture in manga and its growing popularity overseas. Finally, discussing new media distribution methods will facilitate explaining the ongoing evolution of the global publishing landscape. A more in-depth exploration of the industry's inner workings could have been conducted by interviewing current professionals, who would have certainly provided valuable insights. However, this was not feasible for this thesis. The goal of exploring more deeply the editorial processes, from author scouting to distribution, is reserved for future research.

Chapter 1
Analysis of the Italian and European Publishing Industry.

1.1. The European Publishing Landscape.

Japanese literary products have been crossing national borders since the immediate post-war period. By the last decade of the 20th century, Japan's popular cultural products had started to become increasingly relevant worldwide. However, the reception of Japanese literature in Italy and in the rest of the European continent was initially slow. This raises the question: "When did the change occur, and why?". The first section of this thesis analyses the Italian publishing industry, more specifically, the historical changes in manga's popularity and its effects on the comic book market today.

This first chapter explores the current state of the Italian publishing market, focusing specifically on the role of Japanese literature in shaping the industry in recent years. It begins by outlining the structure of the Italian publishing industry, before shifting to a brief analysis of the broader European market for Japanese literary products. Following this, the chapter will discuss the history of comic books in Italy, by addressing stereotypes, the issue of censorship, and the long-term effects of anime broadcasts on Italian television. Building on this preliminary introduction, the chapter will conclude by presenting the current Italian market trends for comic books and foreign fiction literature.

1.1.1. Structure and dynamics of the Italian publishing industry.

How does the publishing industry function? This first section will examine the process of creating and developing literary works, leading to their release on the market, and subsequent dynamics.

The book industry is not only made of authors and publishers, but also editors, graphic designers, typesetters, marketers, booksellers, distributors, printers, agents, and even book reviewers, along with hundreds of other professionals whose aim is to entertain, inform and, ultimately, make a profit

out of literary products.[1] The process of publishing a book, generally, starts with the acquisition of a manuscript from the author. During this stage, the publisher's purpose is to evaluate the manuscript's potential market value and appeal to consumers within the following twelve to eighteen months. After that, comes the development and editing of said manuscript, as editors and designers polish the author's work to maximize its readability and visual impact. Once the manuscript has been revised in its entirety, it reaches the production cycle. Then, managers will create cost analysis estimates while working closely with the production team, until they can start to design the final product. Printers will then prepress, preprint, and paper bind a prototype of the book; at this point, various options of format, scale, and marketability must be considered before a book reaches the shelves. Marketers will develop a marketing strategy for the new product, determine an adequate retail price, and start the promotion process. Finally, the book will reach the channels of distribution, all of which must be analysed to delineate a potential consumer base. Nonetheless, the publishing company's job isn't over once a book goes on sale. The sales department must constantly keep track of revenues and returns, the warehouse managers must monitor distribution and supply chains to control the highs and lows in demand, and finally, the customer service team will handle all inquiries to ensure every customer's needs.[2] At the end of this ever-lasting process, come other streams of revenue, such as foreign distribution, TV and film licensing, and audiobooks.[3] Sales and printing rights are licensed abroad, and new products are translated, adapted, and published every year.

Comic books generally follow the same distribution model. Initially, authors either produce the work or it is commissioned to them, then reach out to publishing companies to submit a project and collaborate with the editorial department. Although certain comics are created by a single author, the majority are usually made by a small group of people, categorised into scriptwriters, illustrators, background artists, colourists, and more, depending on the type of work. Once a comic book has been revised and approved, the publishing company will begin the distribution process through the primary channels, similarly to the rest of the book industry, except for specialized comic bookstores. Naturally, readers can purchase an item by contacting the publishing company and placing a direct order, which happens frequently, as comics are serialised products with limited

[1] GRECO, Albert N.; MILLIOT, Jim; WHARTON, Robert M., The book publishing industry – Third edition, New York, Oxford, Routledge - Allyn & Bacon, 2014 (I ed. 1997). pp. 1-4.
[2] Ivi. pp. 5-6.
[3] *How Publishing works*, in "Publishers Association", https://www.publishers.org.uk/about-publishing/how-publishing-works/ 11-11-2024

supply. Foreign publishers require a middleman, usually a specialised sales agency, to acquire licensing titles and, vice versa, release their products onto the Italian market.[4]

The Italian publishing industry registered in 2023 a 1.1% increase in value, reaching a total of 3.439 billion euros in reader expenditure.[5] Although early data for the year 2024 indicates a slight decline (-1,5%) in value, which positioned Italy behind other major European markets (while the Spanish and German industries grew, Italy, France and the U.K faced a contraction), publishing is still the country's leading cultural industry.[6] Recent years' market size, compared to the surge that occurred in 2021(+11.0%), suggests a market stabilization rather than a significant expansion. This development is the confluence of different factors, for instance, government measures introduced in 2020 have constituted a solid framework to support demand. Despite this, the discontinuation of cultural funds (the "18 App" replacement with the "Carta Cultura" and "Carta del Merito") could influence the market further in the following years.[7] Certainly, there has been a process of extensive product innovation, as publishers have licensed new authors and developed genres that were once neglected, namely education manuals, non-fiction, romance, and comics.

In the Italian publishing industry, Japanese literary products are mainly categorized under foreign fiction and comic books. In 2023 foreign fiction accounted for 56.0% of total fiction sales by value, down from 58.6% in 2022, and sold around 19 million copies. Although this market share has declined over the past decades, in the eyes of Italian readers novels remain predominantly associated with foreign authors.[8] Manga's popularity has been soaring worldwide in recent years, and the Italian comic book market has reflected this change with a steady upward trajectory. According to data collected by Associazione Italiana Editori (AIE), the comic book market in Italy in 2023 registered a +2% production growth by publishing 400 new titles, which marked a +13,2% increase compared to 2019. Manga currently dominates the comic book market, and accounts for the largest share of titles sold, more than 1.800 in 2023 alone.[9] This represents a major shift in Italy's publishing landscape, where comic books once accounted for less than 35% of total publishing production in 2019. By 2023, according to the latest data, their share had risen to 52%,

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[4] Stefania BERTUCCI, *Il mercato del fumetto dal cartaceo al digitale*, Bologna, University of Bologna Digital Library, 2012, pp.13-15.

[5] Giovanni PERESSON, Bruno GIANCARLI, Rachele MARZIOLO, *Rapporto sullo stato dell'editoria in Italia 2024: su consolidato 2023*, Milano, Associazione Italiana Editori, 2024, p. 60.

[6] Daniela POLI, *Il mercato del libro in Italia nel 2024 – Comunicato stampa AIE*, in "Associazione Italiana Editori", 2025, https://network.aie.it/Portals/_default/Skede/Allegati/Skeda105-10239-2025.1.31/Comunicato%20dati%20Scuola%20Mauri.pdf?IDUNI=cftfs0swxf23ro43rhblse322306 01-02-2025

[7] Ibid.

[8] PERESSON, GIANCARLI, MARZIOLO, *Rapporto sullo stato dell'editoria in Italia 2024…*, cit., p.73.

[9] PERESSON, GIANCARLI, MARZIOLO, Rapporto sullo stato dell'editoria in Italia 2024…, cit., p.74.

registering a remarkable +69,7% increase in a matter of five years. In the general category, the comic book sector has registered the highest growth rate, and more than half of the production (3.562 titles) has been manga.[10] Not only does this surge reflect the growing influence of manga within the Italian publishing industry, but also a shift in consumer cultural expenditure and the public's fascination with Japan.

The growing international popularity of manga as a cultural and creative industry, with a vast number of titles sold to foreign publishers, has prompted Japan's Ministry of Foreign Affairs (MOFA) to leverage manga as a tool for cultural diplomacy. This trend is closely tied to the global trade of distribution rights for anime series and films, approximately 60% of which are adaptations of well-known manga.[11] The use of manga in promoting Japanese culture was evident in the promotional video for the Tokyo 2020 Olympics, released in 2016, which featured iconic characters like *Doraemon* (ドラえもん), *Hello Kitty* (ハローキティ), and *Captain Tsubasa* (キャプテン翼, "*Holly and Benji"* in Italy). During the Olympics, de facto held in the summer of 2021, characters from *Naruto*, *Dragon Ball*, *Attack on Titan*, and other popular manga and anime series played a significant role in promoting the event.[12] Nowadays, in Japan, manga has become an academic discipline, with numerous universities and art academies offering specialized programs in manga studies, covering history, theory, and techniques. Among these, Kyoto Seika University attracts a large number of both Japanese and international students to its manga courses; since 2009, the University has held yearly international manga conferences, to discuss the role of manga in society.[13] While manga's cultural presence in Italy, unfortunately, remains relatively niche, Japanese manga museums and cultural hubs are primary tourist attractions. Among these, the Kyoto International Manga Museum (KIMM) stands out as a major cultural point of interest, drawing tens of thousands of local and international visitors annually.[14]

1.1.2. Increasing appeal of Japanese literature and manga.

"Manga" (漫画), which can be translated as "whimsical pictures"[15], is a medium that combines images and words to narrate a story. To put it simply, manga is the Japanese equivalent of comic books, although they are usually classified into their own category based on their origin. In Japan,

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[10] Ibid.
[11] Marco PELLITTERI, *'I manga. Introduzione al fumetto giapponese' di Marco Pellitteri*, in "Letture.org", https://www.letture.org/i-manga-introduzione-al-fumetto-giapponese-marco-pellitteri, 10-04-2024
[12] Ibid.
[13] Jaqueline BERNDT (interviewed by Yata Yumiko), *Manga Makes It to Academia*, in "Nippon.com", 6 June 2012, https://www.nippon.com/en/views/b00802/?cx_recs_click=true 09-02-2025
[14] Ibid.
[15] *Manga – Etymology*, in "Wikipedia.org", https://en.wikipedia.org/wiki/Manga#Etymology 05-12-2024

the term itself refers to a wide spectrum of printed media and formats, such as single-frame illustrations, four-frame comic strips (*yonkoma*)[16], one-shot stories a few pages long, multi-volume serialized comics, and even novels.[17] In Europe, countries central to the diffusion and development of manga and Japanese culture are Italy, France, Spain, and Germany. Sociologist and mass-media specialist Marco Pellitteri individualizes Italy at the centre of the development of the interest towards Japanese popular culture, since 1975, preceding other European nations.[18] At the turn of the millennium, Italy likely had the largest market for manga, followed by France and Germany. In these countries, the market shares for comic books have been growing at a steady pace every year, mainly because of products for younger audiences. In the United Kingdom and the United States, comic books have historically benefitted from a higher social presence, which is evident if we consider the many Hollywood productions based on comic books of the past fifteen years. While in the Italian market, the long tradition of newsstand comics (*Dylan Dog*, *Tex*, *Diabolik*, etc.) dominates the industry, graphic novels have the largest following in France. Nonetheless, what has come to connect nearly every European nation is the recent interest in manga releases, especially in volume format.[19] In Spain, the anime adaptation of Toriyama Akira's *Dragon Ball* (ドラゴンボール) initiated manga sales across the nation. Similarly to the Italian and French cases, the Spanish anime boom in the 1990s coincided with the liberalisation of television frequencies and the birth of private stations which broadcasted anime series that later introduced the audience to the Japanese cultural exports' panorama, such as manga.[20] However, at the time, few people knew about their origins. In Italy, there have been many instances in the past where Japanese popular works with European settings and characters, for instance, Miyazaki Hayao's Studio Ghibli movies, led many to believe that they had been produced by European studios. At best, they were identified as "Chinese/Asian cartoons", with no distinction of origin and ethnicity. The German manga market is considered the third largest in Europe, but unlike other countries, domestic comic book production constitutes only a small portion of the market.[21] Following the end of the Soviet Union, the 1990s brought about a new system of values in the newly formed nations, accompanied by a sentiment of social instability and a climate of criminality. In these circumstances, manga created a medium for identification for young people disapproving of the new social-cultural atmosphere. In Russia, between the late 1990s

[16] "Yonkoma" (or 4 コマ漫画, *yonkoma manga*) generally indicates a comic strip that is divided into four panels. *Yonkoma* in "Wikipedia.org", https://en.wikipedia.org/wiki/Yonkoma, 05-12-2024

[17] Velna RONČEVIĆ, "Transnational Flows of Anime and Manga in the West", in Contemporary approaches to the study of Japanese language and culture: Collection of papers marking the 20th anniversary of the Chair of Japanology, Zagreb, University of Zagreb, 2023, p.91

[18] Ibid.

[19] BERTUCCI, *Il mercato del fumetto…*, cit., pp. 38-40.

[20] RONČEVIĆ, "Transnational Flows of Anime and Manga…", cit., p. 95.

[21] Ivi., p. 96.

and the beginning of the new century, manga was considered an alternative form of entertainment for primarily elite audiences, as it was heavily influenced by political and economic changes. Therefore, their appeal only reached those who could access it through the internet, which used to be a great class discriminator.[22] Parallelly, in Serbia, manga fans had established internet forums and fan associations in order to connect fans, promote awareness about Japanese popular culture and dismantle the prejudice against it. Many European young people, fascinated with Japan from an early age, now dream of becoming manga artists, or pursuing a career in the arts.[23] Manga, as a popular media that is the epitome of Japan's globalizing power, has been incredibly influential in shaping the younger generation's artistic taste and symbolism.

Today, it's common to find prominently labelled "Graphic Novels" sections in mainstream bookstores, a phenomenon that emerged only in the past two decades. Previously, comics were largely confined to specialty shops in most of Europe and the U.S.. The resurgence of the medium has also been driven by clever rebranding efforts, including the adoption of the term "graphic novel" to dissuade the stereotype of being solely for geeky teenage boys, along with the rise of Hollywood blockbuster adaptations of American comics.[24] In an interview panel at the 2013 International Manga Fest, Guarnido Juanjo, Spanish comic artist and co-author of the bestselling graphic novel *Blacksad*, stated the influence of manga on Euro-American comics had been increasing. In regards to manga being translated and sold in Europe, he said it swept the market with its addictive storytelling. In his opinion, France and Belgium had the biggest comic book markets in Europe, comparable to Japan's; the difference between the two, is that whereas in Europe comics are accepted as cultural products and an artistic genre, in Japan they are seen more as objects of entertainment. In his final statement, Guarnido mentioned his surprise in seeing his work *Blacksad* being so well received in Japan (Mashima Hiro, author of *Fairy Tail,* is a great fan of his) saying that Japanese readers had received it just as enthusiastically as it had been in Europe and America. Despite its success, Japanese publishers have endorsed only a few European authors throughout the years, therefore the issue must be related to the publishing world, not the readers' interests.[25]

To summarize, the success of manga in Italy and the rest of Europe is to be attributed to fans' efforts, whose demand created new technologies to access Japanese content, and generated

[22] Ivi., p. 97
[23] Ivi. p. 96.
[24] BERTUCCI, *Il mercato del fumetto…*, cit., p.39.
[25] Juanjo GUARNIDO (interview with), *Blacksad Comic Series Wins Fans in Japan*, in "Nippon.com", 29 January 2014, https://www.nippon.com/en/views/b02207/ 25-01-2025

corporate interest, as publishers leveraged readers' demand in order to expand their revenue sources.

What about Japanese literature? What makes it so appealing outside its homeland? Could the reason be the themes or the features of Japanese authors' prose styles? Experts in the editorial field have attributed its success to the pioneering topics explored (such as gender, the relationship with technology, and societal commentary) that didn't spark an equally varied discourse in European literature until much later.[26] As noted by The Guardian, everyone who has been in a bookshop in recent years, especially since bookshops reopened after the pandemic's emergency lockdown, will have noticed a sudden increase in the appearance of Japanese fiction on the shelves. This appears to be a global phenomenon involving both European and U.S. markets. According to Nielsen BookScan's data collected in 2022, Japanese fiction represented 25% of all translated fiction sales in the UK; in November 2024, that number has risen to a staggering 43%.[27] In 2023, Yuzuki Asako's *Butter* stood in the number one spot of The Guardian's "Top 40 translated fiction titles" chart, which additionally earned Yuzuki the "Breakthrough Author Award" award. Some have even referred to Yuzuki as the heir to the Japanese cult author throne, following Murakami Haruki's legacy. Needless to say, the popularity of Japanese fiction overseas is not a new phenomenon, neither in the U.K. nor in the rest of the European continent. From 1990 onwards, Yoshimoto Banana and Murakami Haruki quickly gained global attention. Yoshimoto reached the overseas market in the late 1980's, with the translation of some of her works such as *Kitchen* (キッチン) and *Lizard* (とかげ), which quickly resonated with fans for their insight into womanhood. Later in the 1990s, Murakami's *The Wind-Up Bird Chronicle* (ねじまき鳥クロニクル, *Nejimakidori Kuronikuru*) was translated into English by Harvill Press and released on the British market. Since then, his works' popularity has never quite decreased, which can be proven by the amount of traction each new book manages to create, culminating in the phenomenon called "Haruki Boom"; more than 30 years later, Murakami's lasting success continues with the publication of his fifteenth novel, titled *The City and Its Uncertain Walls* (街とその不確かな壁, *Machi to Sono Futashika na Kabe*), which has already become a global success. Despite this, critics have been discussing the popularity of Japan's most important novelists for decades. In 1990, Nobel Prize for Literature winner Ōe Kenzaburō sternly criticized in his famous essay both Murakami and Yoshimoto for their depictions of youth and Japanese society. However, could one argue that the very themes of alienation, surrealism, and moving against societal expectations, are what focused the attention to

[26] Jhon SELF, *Surrealism, cafes and lots (and lots) of cats: why Japanese fiction is booming*, in "The Guardian", 23 November 2024. https://www.theguardian.com/books/2024/nov/23/japanese-fiction-britain-translation 10-12-24
[27] Ibid.

Japanese literature overseas in the last thirty years? In the past decade, a great number of Japanese authors have emerged not only in literary fiction, but crime fiction too. Novels such as Matsumoto Seichō's *Tokyo Express* (点と線, *Ten to Sen*), Murata Sayaka's *Convenience Store Woman* (コンビニ人間, *Konbini Ningen*), Kawakami Hiromi's *The Third Love* (三度目の恋, *Mitabime no koi*), Arikawa Hiro's *The Travelling Cat Chronicles* (旅猫リポート, *Tabineko Ripouto*) and Kawakami Mieko's *Heaven* (ヘヴン) have become best sellers in recent years. Nonetheless, readers have shown interest in various genres, as Japanese authors' works available on the market range from serious and melancholic, to calmer and softer, such as the novels labelled '*iyashi-kei*' (healing type).[28] These novels have become part of a trend that emphasises Japan's zen ideology, and have gained popularity for being comfort books with predominantly heartwarming stories. Many have pointed out what seem to be recurring motifs in Japanese literary works that have created a following in the past few years, for example, coffee shops, bookstores and libraries, and cats, appealing to both young and older audiences.[29] There appears to be a rejection attitude from literary critics and Japanese literature experts towards comfort books, and the callous presence of Japanese publications in the subgenre. However, from the point of view of publishers, one could say that as long as something sells, why pay it any mind? Maybe publishing companies are indeed moved more by profit than anything else: many have been known to adapt books to appeal to and reinforce established trends, following a bandwagon all major companies in the industry wish to pursue. The comfort genre has been around forever, although recently it has benefitted from the significant influence of social media in its promotion. Translators have commented on the new open-mindedness of editorial departments towards Japanese literature, especially in women writers' works. Experts believe such popularity is due to the quieter and non-judgemental tone of Japanese literature: lots of stories have open endings, are up to personal interpretation, and so can capture a wider variety of readers.[30] In Japan, the *"iyashi-kei"* genre has been attracting readers who look for balance within the modern world, or simply take comfort in literary escapism. Therefore, a possible reason for its recent popularity with European readerships could be interpreted as the cultural

[28] Mike FU, *Women are writing a new chapter in Japanese literature in the 2020s*, in "The Japan Times", 15 December 2024, https://www.japantimes.co.jp/culture/2024/12/15/books/japanese-literature-translation/?cx_testid=9&cx_testvariant=cx_1&cx_artpos=3&cx_experienceid=exe9ifvh25em&cx_experienceactionid=showrecommendations27pllzj3ito1103&cxtrackingid=%7bkpdx%7daaaaqnqkbt7ybaokyldpv1nkafhwahiqbtu5dtfmowr2eddrczbicromrvhfoulgvkgynuvniiuxoddqmgiwmdlvltawmdazntbqohb0nhz0mheza3nnzdixdmw4kijzag93umvjb21tzw5kyxrpb25zmjdqtexasjnjve8xmtazuhj2lw0a8bphmhj1zxdxynnhwg4xndyumjqxljc4ljezm2idzhdjap2xy7sgcaj4ga#cxrecs_s, 10-12-24.

[29] Jhon SELF, *Surrealism, cafes and lots (and lots) of cats…*, cit.

[30] Jhon SELF, *'It's exciting, it's powerful': how translated fiction captured a new generation of readers*, in "The Guardian", 29 July 2023 https://www.theguardian.com/books/2023/jul/29/its-exciting-its-powerful-how-translated-fiction-captured-a-new-generation-of-readers 10-12-24

repercussions associated with the pandemic, and a response to societal crises of this decade.[31] Nevertheless, this literary phenomenon doesn't necessarily imply a negative effect on the cultural landscape and should not be met with criticism or disregarded as superficial. There are readers for whom the comfort genre might become a gateway into the broader world of Japanese fiction: some other genres don't manage to create an audience outside of Japan, although being very popular in their homeland, so the current interest in Japanese comfort fiction could boost the process of acquiring and translating other and more complex novels, which may have never reached foreign markets otherwise.[32] Is the appeal of Japanese literature destined to subside? This has been an ongoing discussion in literary studies. Since the early 2000s, experts in the publishing industry have been uncertain about Japanese literature's presence in the market, suggesting that this trend might eventually lose relevance as readers' attention will inevitably shift to the next big thing. The fickleness of consumer interests is notoriously hard to predict. However, one could argue that certain works of Japanese literature are here to stay. The global phenomenon surrounding Japanese authors cannot be denied, and their contributions are likely to secure a place in literary studies as defining cultural cornerstones of our time.

1.2. Comic Book History in Italy.

Unlike most European countries (with partial exceptions of Belgium and France) manga in Japan has evolved over the past decades from being an ill-perceived form of entertainment for illiterate people or children to achieving the status of authentic national cultural asset. The key factor for this change in public legitimacy was the maturation of manga as a narrative form and visual language. Over the years, manga creators and publishing editors have managed to expand manga's audience, transforming it from a medium primarily aimed at children and teenagers to one that also resonates with adult readers. It's important to note that manga's influence permeates Japanese visual communication far more deeply than in European countries: cartoons and mascots frequently feature in public advertising campaigns, proving manga's widespread cultural integration.[33] Despite continuous efforts by foreign readers to access manga outside of Japan, European publishers have not only been uninterested in but also opposed to its distribution for a long time. The following section briefly introduces the history of comic books in Italy, the presence of anime on national television and its relationship with manga, and the localization issues.

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[31] Mike FU, *Women are writing a new chapter in Japanese literature…*, cit.
[32] Alison FINCHER, *Why Japanese Literature?*, in "Alison Fincher reads Japanese lit", https://readjapaneseliterature.com/about/ 10-12-24
[33] PELLITTERI, *I manga…*, cit.

1.2.1. Stereotypes and early perceptions.

The word manga was introduced in Europe in the second half of the nineteenth century, when at the 1889 Paris Exposition a collection of Hokusai Katsushika's works was presented with the title "Hokusai manga". Around that time, Japan's publishing industry flourished and saw a gradual change in techniques and modes of expression, including the birth of an archaic form of manga. Initially, the evolution led to the persistent and eventually regular employment of this new medium for political and satirical commentary, through a sequence of illustrations.[34] The importation of notorious American comic strips was an ulterior source of inspiration for Japan's first generation of *mangaka*. The first manga published in Italy in a format somewhat close to its original Japanese counterpart was Ōtomo Katsuhiro's *Akira* (アキラ), a masterpiece of science fiction, published in 1990 as a filtered version of the American edition, coloured and distributed by the French company Glénat, although serialization ended before its completion.[35] The experiment, however, brought to life new editorial groups, such as Grenata Press and Star Comics. In fact, Grenata Press in the early 1990s played a major role in distributing manga in Italy, by publishing various anthologies. Although many series were left incomplete, Star Comics picked up the serialization of some of them and provided new dialogue adaptations with the scope of maintaining manga's original structure. As a result, in 1995 Star Comics released on the market Toriyama Akira's *Dragon Ball* with the Japanese right-to-left reading direction, an unprecedented decision. The reason for these new editorial choices was to satisfy the requests of Japanese publishers, who opposed excessive revisions, and the new format was surprisingly rewarded, as *Dragon Ball* sold more than one hundred thousand copies. Following the success of these initiatives, from 1995 onward more companies have started to publish manga, such as Panini (which created the Planet Manga division), and the Italian division of the Japanese company Dynamic Planning.[36]

However, manga was not immediately embraced in Italy upon its introduction. In various national contexts, the initial encounters with anime and manga were a cause for moral concern, which led to many persistent stereotypes and raised critiques against their distribution.[37] It is important to note that Italy already had a well-established and extensive comic book market, arguably one the largest in Europe, alongside the French market. So, why did the public reject Japanese comics, and why

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[34] Marcella ZACCAGNINO, Sebastiano CONTRARI, *Manga: Il Giappone alla conquista del mondo*, in "LimesOnline", 31 October 2007, pp. 1-3 http://limes.espresso.repubblica.it/2007/10/31/manga-il-giappone-alla-conquista-del-mondo/index8c55.html?p=313 , 07-10-2024

[35] Francesco CALDERONE, *Universo manga: Indagine sui lettori di fumetto giapponese in Italia*, Caserta, Società Editrice La Torre, 2011. pp. 38

[36] Ivi. pp. 44-46

[37] PELLITTERI, *I manga…*, cit.

was manga met with resistance from the publishing industry? Was it due to its Asian origins, a rebuttal based on lingering post-war ideology? The Italian market for comics wasn't lacking in titles, nor were they generally met with moral policing and public concerns, so why were manga treated differently?

The Italian public has perceived for decades commercial comics and animation as forms of entertainment primarily intended for children. Up until fifteen years ago, public prejudice surrounding manga was so widespread that the common idea of manga and comics was that they contributed to moral and social decline. Moral panic and uninformed criticism meant that manga was often indiscriminately labelled as violent or sexually explicit, which could have negatively impacted younger audiences. While some dismissed it as a fleeting trend, others demonized it without trying to understand its cultural significance.[38] Manga fan groups have long criticized the media's tendency to condemn manga and anime without concrete evidence and have been eager to change this erroneous perception, which oftentimes stemmed from a failure to distinguish between different genres and their intended audiences.[39] Because of these negative stereotypes, the activity of reading manga was considered a sign of infantilism, both in adolescence and even more so in adulthood. Manga readers used to be judged for their interests, and many have been mocked based on the idea they were childish, strange, abnormal, and even perverted. Others were labelled as comics, video games and cartoons 'nerds'. As a result, many have felt pressured to advocate for their hobby while justifying the time and money spent on it.[40] This brought some fans to keep their passions to themselves, while of course, others expressed theirs more openly and at times showed exclusive patterns of consumption, which unfortunately only reinforced the stereotypes of social isolation. The long-standing list of stereotypes associated with manga fans in Italy, particularly those labelled as *otaku,* defines them as nerds, usually ugly, with body odour issues, not particularly intelligent and without friends, and undoubtedly single.[41] Although the term *otaku* can be used in a variety of situations, when referring to manga readers, in Japan *otaku* has historically denoted a category of people who obsess over fictional characters, are socially awkward, and have limited interactions with others. In other words, they were labelled as outsiders.[42] In addition to this, Japanese popular media fans have long been portrayed as perverted, due to the unregulated circulation of erotic manga and anime, especially at comic book conventions, which were

[38] CALDERONE, *Universo manga: Indagine sui lettori…*, cit., p. 138.
[39] Ivi, p.146.
[40] Ivi, pp. 142-143
[41] Ivi, pp. 141
[42] DI FRATTA, Gianluca. "Il Fumetto In Giappone: 4) Il Manga Di Fine Millennio.", *Il Giappone*, vol. 43, Napoli, Università di Napoli L'Orientale, 2003, pp. 183-184.

considered the pinnacle of fanatism culture. Although these stereotypes have negatively influenced public perception of manga for decades, in recent years there have been significant changes in the manga community, as fans have defiantly reappropriated the *otaku* label and embraced their interests freely, and the increased circulation of Japanese material through major distribution channels has prompted a more nuanced understanding of manga in society.

Manga probably received such heavy criticism because of the ill-reputation of anime series broadcasted on national television popular at the time. Anime faced greater scrutiny due to its availability and previous introduction in the entertainment industry: when it reached Italian audiences, *Mazinger Z* was oftentimes deemed inappropriate for children because of its violent content and had a great impact on public opinion of Japanese animation. Italian audiences preferred anime with Euro-centric settings and a calmer atmosphere in children's daytime broadcasting segments, such as *Heidi*. At the beginning of the anime boom, which will be discussed more in detail in the following section, titles such as *Hellsing*, *Akira*, and other *shōnen* or *seinen* manga were condemned for their violent nature and negative influence on young boys, while *Sailor Moon* was said to introduce young girls to violent behaviour and witchcraft, and *Dragon Ball* was condemned for its erotic representations, inappropriate for young viewers.[43] These misunderstandings could have been mitigated through appropriate broadcasting time slots and content adjustments for younger audiences. Even in Japan, many parents and women's associations declared Shueisha's "Weekly Shōnen Jump" magazine a bad influence on children and criticized some of the stories' vulgarity.[44] In online communities, fans have argued that the industry in the past had stayed stagnant for too many years, due to the persistent belief that comics and cartoons were strictly for children, despite many Japanese popular works being clearly intended for teenagers or audiences of all ages.

It took some time before the Italian public got used to non-Eurocentric comic books, and discussing more mature and serious topics in the form of animation, which, as we have seen, had a strong effect of dissonance with European audiences up until twenty years ago. However, the fault wasn't of the material in itself, but of inconsiderate and inappropriate distribution and broadcasting choices from publishers and producers, who marketed to children content that wasn't, in their original Japanese form, aimed at them. After all, in most anime, violence and sexuality are no more explicit than in some American movies broadly available and sought by vast audiences.[45] In conclusion,

[43] RONČEVIĆ, "Transnational Flows of Anime and Manga…", cit., p.98
[44] ITO, Kinko, "Manga in Japanese History", in Mark W. MacWilliams (edited by), *Japanese Visual Culture: Explorations in the world of manga and anime*, New York, London, M. E. Sharpe, 2008, p.38
[45] RONČEVIĆ, "Transnational Flows of Anime and Manga…", cit., p.99

today many have acknowledged the significant improvement in the entertainment industry compared to a decade earlier: the progress came when specialized programming for anime was introduced on television (for example MTV aired anime in its original, uncensored format) or on-demand satellite channels (Cartoon Network and Disney Channel) or streaming platforms (like Crunchyroll or Netflix), and most of all, thanks to the emergence of new publishing houses which helped popularize manga. Ultimately, Japanese cultural exports since their introduction to the Italian market, have been interpreted through paradigms shaped by deeply internalized cultural assumptions.[46]

1.2.2. The 1990 anime boom and its influence.

For generations born from the 1970s onward in Italy, their knowledge of Japan has been profoundly influenced by cultural objects such as manga and anime. The term 'manga', originally coined by renowned painter Hokusai Katsushika at the beginning of the nineteenth century, was also used to refer to animation from the 1950s to 1975, until the term 'anime' (a derivative of the English word 'animation') came into common use.[47] For a long time, these products have coexisted in the entertainment landscape. Naturally, Japanese animated cartoons and manga are very different media formats, although in the Italian context, they are often mistakenly considered the same thing. They are certainly closely related, and for the most part, talking about anime implies referring to the manga series from which it originated.[48] Although manga became popular only a decade later, its success in Italy could be attributed to the broadcasting of anime series on private television, which were almost entirely based on manga series.

The European anime boom happened in the early 1990s, when anime became a profitable export media for Japan, and its popularity among younger audiences increased. Compared to the rest of Europe, Italy was the first country to experience the boom; in fact, Italian audiences have been accustomed to consuming Japanese animation since around 1975. The second surge of anime popularity happened roughly in the 1990s, in line with the rest of Europe and North America. By around 2005, video sales and anime's popularity had overall stabilized, and from that moment on manga sales surged accordingly. In 1975, RAI introduced a late afternoon broadcasting block, that scheduled a daily lineup of television dramas and American cartoons aimed at teenagers, where later on anime would become a part of.[49] In addition to this, around the 1980s, when the first anime

[46] CALDERONE, *Universo manga: Indagine sui lettori…*, cit., p. 146
[47] PELLITTERI, I manga…, cit.
[48] CALDERONE, Universo manga: Indagine sui lettori…, cit., p.34
[49] Marco PELLITTERI, Mazinga Nostalgia: storia, valori e linguaggi della Goldrake-generation, Roma, Castelvecchi, 1999. P.252

boom happened in Italy, private broadcasting channels started to enter the television industry. Many of these new television broadcasters, hungry for new content to distribute and expand their influence, purchased licensing rights to countless animated series from Japan; at the time, anime was considered a convenient and practical product to fill daytime broadcasting hours on the new channels. The first anime series that were broadcast in Italy were *Vicky il vichingo* and *Heidi*, both Japanese-German coproductions that reached immense success and aired in 1975 and 1976 respectively.[50] Then, towards the end of the decade came many of the anime series that created the so-called "Goldrake generation": Mazinga Z (マジンガー, *majingā*), Space Robot (ゲッターロボ, *gettā robo*), Jeeg Robot d'acciaio (鋼鉄ジーグ, *kōtetsu jiigu*), Remì (家なき子, *ie naki ko*), Candy Candy (キャンディ・キャンディ, kyandi kyandi), Captain Harlock (宇宙海賊キャプテンハーロック, uchū kaizoku kyaputen hārokku) and Lupin III (ルパン三世, rupan sansei).[51] Regarding anime being aired on national television, Italy showed a consumption model similar to Japan's, as broadcasting generally occurred over a time frame of multiple hours, showing multiple episodes in sequence every day.[52] The preferred time slot was between two and six in the afternoon, therefore, the time of the day when children got out of school and went home to have lunch, before dedicating themselves to homework. A crucial factor that contributed to the rise of anime in Italy was its seriality. Up until the 'anime boom' audiences weren't accustomed to serialised cartoons: cartoons created by American studios, such as Walt Disney's *Mickey Mouse*, Carl Barks' *Donald Duck*, Warner Bros's *Looney Toons* and Hanna-Barbera's *Tom and Jerry* and *Scooby-Doo,* to name a few, were all designed as self-contained, one-shot episodes.[53] On the contrary, Japanese anime series, such as *Heidi* and *Lady Oscar*, unfolded the story throughout multiple episodes and seasons, similarly to the structure of television dramas. This new storytelling approach no longer allowed the audience to watch cartoons sporadically, instead, it required them to follow the series consistently to understand the full story. This created a very engaged viewership which ensured the broadcasters a steady revenue.[54] Between 1963 and 1990, an exorbitant number of anime series were introduced to Italian television broadcasting schedules, more than 350 titles, most of which for serial products.[55] However, the arrival of anime was not immediately welcomed, on the contrary, it elicited disapproval from many sources. The main arguments raised to discredit anime were that Japanese animation (and manga, for the record) were made entirely by Japanese supercomputers, from the

[50] Ibid.
[51] PELLITTERI, *Mazinga Nostalgia…,* cit., pp. 253-254
[52] RONČEVIĆ, "Transnational Flows of Anime…" cit., p. 92.
[53] PELLITTERI, *Mazinga Nostalgia…*, cit., pp.74-75
[54] Ivi, pp.121-126
[55] Ivi, p.131.

storyboards to the screenplay, and that Japanese animators were uncreative and had copied what they could from the far-better-made American cartoons, which production studios had never and never would resort to using computers. Others criticised the media's Japanese origins, saying that fans were 'anti-American Japanophiles'. This sentiment, of course, was heavily inflated by news media, creating controversy around any topic that would elicit a reaction from the public based on its novelty and make a profit out of it.[56] The majority of anime fans contested the press for years for its role in negatively influencing the public perception of Japanese media in Italy, which reaffirmed the cultural, sociological, and psychological blindness of mainstream media towards the significance of the interests of the new generation.[57] The period from 1981 to 1983 marked the peak of the "anime boom", and until the turn of the millennium production levels have never faltered. Another fundamental element in the establishment of anime within the Italian media market was the availability of related merchandise, mainly toys at first, but in time followed by manga, on the general market. For instance, a wide variety of comic magazines, trading cards, colouring books and stationery items became quickly available at newsstands, and countless robots and spaceships invaded toy stores. The first instances of manga in Italy were actually "anime comics", in other words, comics created with still frames of anime series, which contributed to fuelling the fans' interest in Japanese media.[58]

One vivid memory of mine, which surely many people of my generation share with me, is going home from school and watching new episodes of Toriyama Akira's *Dragon Ball*, Kishimoto Masashi's *Naruto*, or Monkey Punch's *Lupin III*, one after the other while having lunch with my family, every day. As studies show, this broadcasting format intensified the viewer experience, which created a strong emotional connection and impacted many people's lifestyles, resulting in a generational cultural attachment to Japanese media. However, today anime is no longer as present in television channels' broadcasting schedule as it once was, as the European Union has been working towards promoting the European animation industry, and licensing contracts with Japanese producers have changed significantly with the rise of streaming platforms.[59]

[56] Marco PELLITTERI, Mazinga Nostalgia…, cit., p. 131-132
[57] Ivi, p. 257
[58] Ivi., p. 261
[59] RONČEVIĆ, "Transnational Flows of Anime…" cit., p.92

1.2.3. Censorship and the ethics of translation.

The main reason for content censorship in Italy is cutting strong imagery, particularly those scenes relating to physical pain, violence, substance abuse, nudity or semi-nudity, to protect the younger viewership. Of course, it is imperative to ensure children don't encounter "strong" representations which aren't suited for them, however, at times censorship has impacted storytelling more than it has protected children.

In Italy, conservative groups and parental associations, journalists and pedagogues opposed the distribution of manga content and formed an initiative to demand the cancellation or reduction of Japanese animation broadcasting. Fans criticized in particular Mo.I.Ge. (Movimento Italiano Genitori) which is a social promotion association whose activities are aimed at protecting the rights of parents and minors in the cultural and educational field. It is infamously known for its controversial positions on sexuality, for carrying out many awareness campaigns and for monitoring television programming aimed at minors. It has exerted considerable influence on the media industry in the last twenty years, so much so it achieved direct intervention on Italian television schedules by imposing specific broadcast times and censorship for some programs.[60] Famous instances are the heavy editing of certain scenes in anime, particularly *One Piece* (ワンピース), *Detective Conan* (名探偵コナン, *Meitantei Konan*) and *Dragon Ball* anime (blood repainted in brown, cigarettes replaced with lollipops, cadavers removed, and such), LGBTQ+ themes erasure, and more significantly, alteration of dialogue translations.[61] In manga, vignettes containing partial nudity or sexual content were either eliminated, or redrawn by changing the character's clothes; consumption of alcohol, tobacco, and other substances was censored by inserting random furniture in front of the characters; and all the pages containing inappropriate content which were too difficult to modify were simply removed before release. In the rare cases where manga volumes were mistakenly published without all the alterations publishers deemed necessary, they were either immediately returned to distributors, or went on to become rare collection items. Nonetheless, these censorship practices are in act wherever in the world manga are published, depending on the country's political and historical heritage.

The process of translation entails more than linguistic switching. Depending on the target audience, cultural context and themes of each work, translators must choose whether to maintain the narration style and the spirit of the text intact while conveying the story fluently in the target language, or to keep the translation as close to the original as possible, at the risk of impacting the prose in the

[60] CALDERONE, *Universo manga: Indagine sui lettori…*, cit., p. 142
[61] *Il Moige Deve Finirla*, in "Petizioni.com", 2011 https://www.petizioni.com/il_moige_deve_finirla 12-02-25

process. Between the late 1990s and early 2000s, manga translators and editors faced significant challenges as the process changed over time from cultural difference erasure, to cultural promotion and amplification because of the material's national origins.[62] The approach to comics as "exotic" cultural media, initially caused a negative reception of the Japanese culture. For example, stories which contained elements of Bushidō[63], such as manga about samurai or ninja, were considered to incite a sense of nationalism, although one could argue that the creators intended to promote cultural knowledge, rather than romanticizing Japan's feudal and imperialist past.[64] The mainstream acceptance of Japanese popular commodities has reaffirmed preexisting stereotypes about Japan, as well as generated new ones. Especially in the American context, after World War II consumers were presented with heavily alternated content from Japan, which shaped the country's image in their eyes. The primary reason for media censorship was to eliminate political commentary, satire, and most importantly erase any implied criticism of the United States of America following the nuclear disasters of Hiroshima and Nagasaki, and the nuclear testing in the South Pacific Ocean.[65] This is particularly evident in the long history of modifying monster movies (in primis, *Godzilla*) in television programming by exaggerating or fabricating humorous and self-parodic elements. Because of this, Japan has been persistently portrayed as eccentric, unpredictable, and even absurd. Decades of poor dubbing and substantial editing have only aggravated the perception of Japan in the rest of the world, described as wacky, cheesy, and inferior to American culture.[66] Then, as the Japanese economy surged between the 1970s and 1980s, the international reputation of Japan's pop culture products followed the same growth trend, mimicking Japanese automobiles and electronics. Once dismissed as cheap copies of American and European comic books, manga came to be highly desirable and globally recognised for its economic value by foreign publishing companies.[67]

Oftentimes cultural elements such as Japanese honorifics, the use of chopsticks, *futon* or Shintō shrine visits would be perceived as too alienating for the target audience, and after being deemed untranslatable, they would have to be removed entirely. However, this cultural erasure implied losing the essence of the works, and by the mid-1990s, given the global popularity of some game

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[62] Jennifer PROUGH, "Marketing Japan: Manga as Japan's New Ambassador", *Asian Network Exchange Vol.7, No. 2*, Illinois Wesleyan University, 2010, p.60

[63] Bushidō (武士道) means "the way of the warrior". In medieval times, it was the samurai's moral code. *Bushido*, in "Wikipedia.org", https://en.wikipedia.org/wiki/Bushido 03-02-25

[64] Sofiya SHAHIWALA, "Paper Bridge To Japan: Reviewing The Relevance Of Manga In Spreading Japanese Cultural Identity", *Spreading Japanese Cultural Identity* Vol. 3 No. 5, Asian Journal of Multidisciplinary Research & Review, 2020, p.108

[65] William M. TSUTSUI, *Japanese Popular Culture and Globalization,* "Key Issues in Asian Studies, No. 6", Ann Arbror, Association for Asian Studies Inc., 2010. P. 48

[66] Ivi, p.52

[67] Ibid.

series (for instance, the *Pokémon* card trading game, and titles from Nintendo and Sony), Japanese content within popular media posed no longer an issue.[68] On the contrary, it became a selling point. On the matter of cultural preservation, certain elements of Japanese culture, such as the use of honorifics (which are generally left intact), are sometimes explained in side or footnotes to introduce readers to customs or situations that they might not be familiar with. Until the turn of the decade, each element required significant paratextual support, and footnotes were much more extensive than they are today. In addition, manga copies sold in Italy by major publishers all present a "How to read this volume" instruction page, to remind readers of the right-to-left orientation. This helps the audience to be drawn into the world of the story, while enriching their knowledge of Japan's heritage. Each tailoring the editors implement is a nuanced decision about translation, to help readers better understand the story and its broader context.[69] Cultural translation for manga also has to deal with the inclusion of onomatopoeia. They are an integral part of comic books, used to enhance and control the flow of the story, but they are also notoriously hard to translate. Some commonly used onomatopoeia in Italian are different in English, and Japanese ones definitely are in a category of their own.[70] Oftentimes, it is both cheaper for the editors and more authentic to the reader if the original sound effects are left as they are.

Translating and localizing manga is a considerably complex task. Although fans tend to prefer versions with as few changes as possible, publishers have to keep in mind the age of the target audience, and what may be inappropriate for them. Nevertheless, editors must keep in mind to not cross the fine line between adaptation and cultural erasure, and most of all, the industry must focus on appropriate marketing and conscious content distribution practices.

1.3. Japanese Works in the Editorial Market.

As we have seen in the previous section, the globalization of Japanese cultural entertainment products, particularly manga and anime, has not necessarily led to Japan's distinctive traditions being absorbed into a homogeneous global cultural identity. On the contrary, the process of localising these products has reinforced or even amplified stereotypes on Japan's unicity and created an imaginary national identity that caters to foreign media markets and consumers.[71] The recent effects of Japanese literature on different publishing markets worldwide have been varied, but simultaneous and related to one another. While Japanese popular media's cultural influence will

[68] PROUGH, "Marketing Japan…", cit. p.62
[69] Ibid.
[70] Ibid.
[71] TSUTSUI, *Japanese Popular Culture and Globalization…, cit.*, p. 54

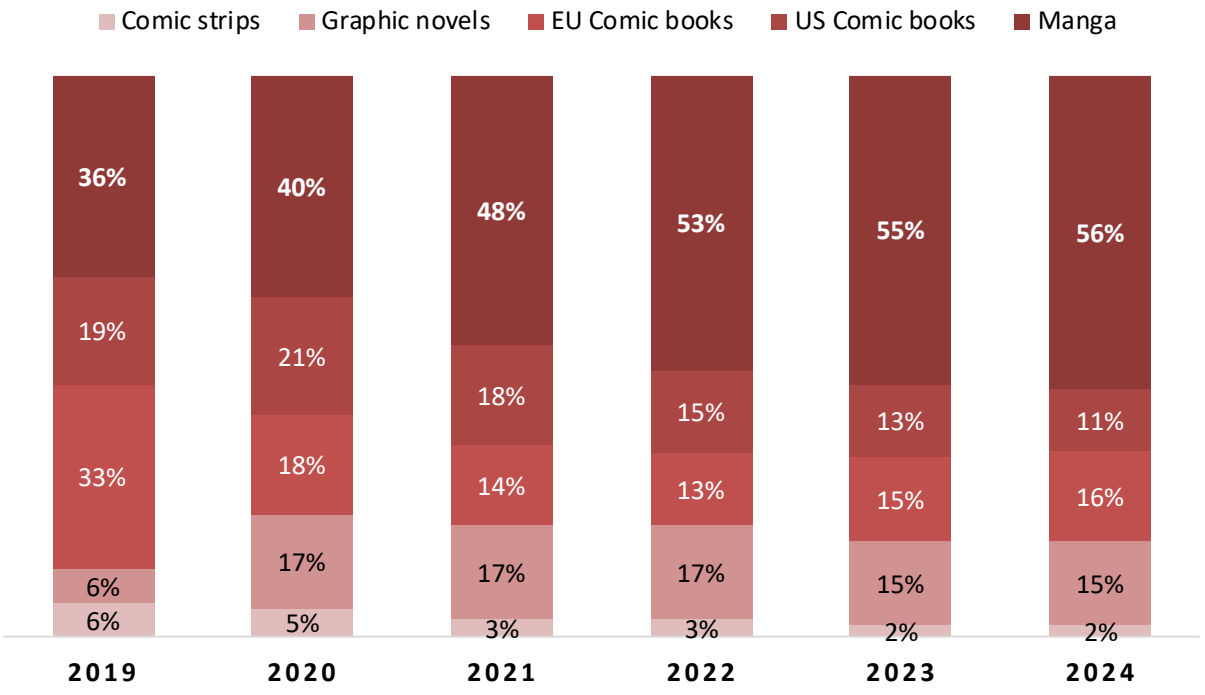
be discussed thoroughly in Chapter 3, the following section will shift the focus to analysing the changes they have brought upon the Italian publishing industry from 2019 until today.

1.3.1. Current Italian market trends for comics.

According to the AIE (Associazione Italiana Editori), comic books are the genre of publication which has experienced the highest growth rates since the pandemic started. The data presented in this section was first presented in a panel by AIE on October 18th 2024 at the end-of-year Frankfurter Buchmesse conference (Frankfurt Book Fair). Data from the first eight months of each year (monitored by NielsenIGQ-GfK, which includes independent bookshops, online stores and large-scale distribution) show a significant increase in popularity amongst consumers. Between 2019 and 2024, the number of new comics released for children has almost doubled. Additionally, comics for adults seem to have declined over the past 5 years, but it is important to note how sales of highly serialized products (namely manga and US comics) can vary significantly from one year to the next merely due to the combined ending of relevant works.

As seen in Figure 1.1 on the next page, which doesn't take age into consideration, where manga used to cover just over a third of production in 2019, now covers over half of the production. While American and European comic books have declined significantly (respectively -48% and -41,1%) in the past few years, manga and graphic novels have been the fuel of the industry. Graphic novels have grown exponentially (+163.1% between 2029 and 2024), particularly Italian products, which can be attributed to the intensive work of scouting and promotion done by publishers. In a matter of 5 years, comic book sales, from both physical and online bookshops, have tripled, going from 18.1 million euros in 2019, to 65.8 million euros in 2022, and finally to 56.7 million euros in 2024 (-5.3% year-on-year). According to the AIE, the slight decrease in revenue in 2024 compared to the previous year, has to do with trivial factors, such as the fact that some manga series have finished serialization, or are on hiatus.

Figure 1.1: Trend In Comic Books (Italy) 2019 – 2024. Source: AIE, NielsenIQ-GfK.

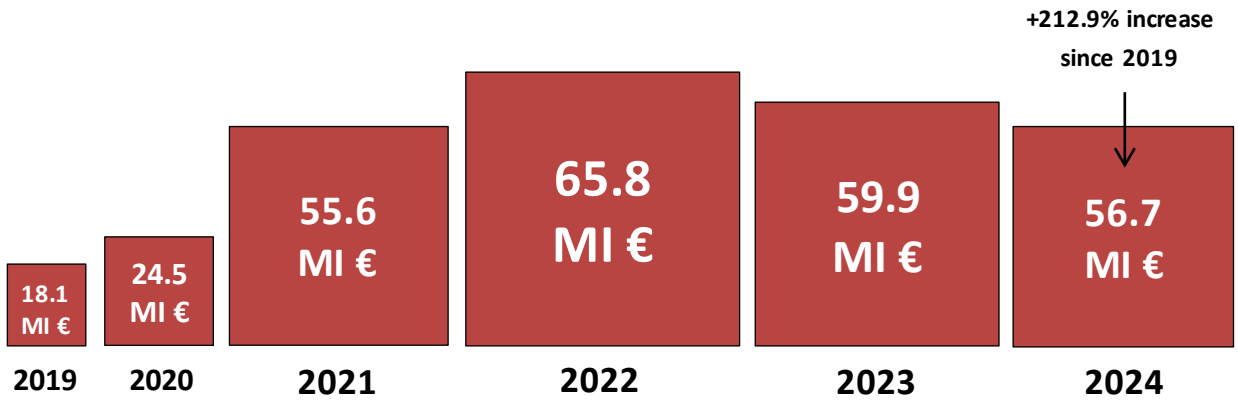


Comic book sales accounted for 2,5% of the total consumer market in 2019, whilst in 2024, that number has gone up to 6,2%. In terms of copies sold, the picture doesn't change much. Although the loss seems to be slightly more significant (-9,8% since 2023), due to fewer manga sold and many series reaching the end of serialization, the market is still three times larger than it was five years prior. Today, almost one in ten books sold in Italy is a comic book. However, it would be simplistic to say that this portion of the market was created out of thin air. According to the AIE, the consumer's purchase numbers represent not so much new readers, but readers who have moved from comic shops to mainstream bookshops. The shift was possible thanks to the newly achieved recognition of comics as a media that allows cultural consumption, whilst up until a few years ago, namely before the Covid-19 pandemic started, comic books weren't sold in mainstream bookshops. This wasn't due to a lack of readers interested in them, but because they weren't displayed on bookstore shelves much. The appearance of comics in traditional sales channels has meant that those who previously did not read comics have had the opportunity to encounter them in bookshops as well, thus creating a virtuous circle to the benefit of the publishing industry in its entirety.

Today, three out of four comic books sold in Italy through the different trade channels are manga. Although their share is decreasing compared to its peak back in 2021, it is natural for serialized work to weigh so heavily in terms of capital sold (55% of expenditure). The numbers shouldn't, however, obscure the fact that all genres have grown this past year. Both graphic novels and children's comics are growing steadily as well, proving once again the great enthusiasm that

accompanies comics these past years, regardless of the different mediums through which the narration is articulated. The figure below shows the fluctuation of the comics' market size in the past five years, exemplifying the growth rates.

Figure 1.2: Reader's expenditure in Italy on comic books 2019 – 2024. Source: AIE, NielsenIQ-GfK.



Let us now examine the sales rankings of comics in Italy over recent years, which show interesting trends. The following charts present report data from 2022 and 2023, collected by Associazione Italiana Editori (AIE) in collaboration with Giornale della Libreria (GdL) and NielsenIQ; unfortunately, data from previous years is not available, as the parties started compiling charts in 2022. Additionally, data from the year 2024 isn't yet available, if not for the monthly results, which will be discussed later. The rankings below include graphic novels, manga, Euro-American comic books, and children's comic books. Books that are part of a series are counted individually. However, the rankings do not include sales from specialized retailers such as comic book shops, newsstands, comic conventions, or libraries, as they reflect sales data solely from bookstores (both independent and chain retailers) and online stores.[72] Nonetheless, despite excluding data from comic-specific outlets, it is fascinating to observe the steadily growing number of comics sold through retailers that, until a few years ago, were not involved in selling comic books at all.

[72] *Le classifiche del GDL dei libri più venduti*, in "Giornale della Libreria", https://www.giornaledellalibreria.it/categorie/le-classifiche-del-gdl-dei-libri-piu-venduti-19.html 13-10-24

	2022		2023
1st	*No sleep till Shengal*, Zerocalcaare, Bao Publishing.	1st	*Divertimenti,* Pera Toons, Tunué.
2nd	*Le storie da brivido*, Lyon, Magazzini Salani.	2nd	*Ridi a CreepyPelle*, Pera Toons, Tunué.
3rd	*Ridi che è meglio,* Pera Toons, Tunué.	3rd	*Ridi che è meglio,* Pera Toons, Tunué.
4th	*Giochi e risate*, Pera Toons, Tunué.	4th	*Giochi e risate*, Pera Toons, Tunué.
5th	*Ridi a CreepyPelle*, Pera Toons, Tunué.	5th	*Fatti una risata*, Pera Toons, Tunué.
6th	*Sfida all'ultima battuta,* Pera Toons, Tunué.	6th	*Sfida all'ultima battuta,* Pera Toons, Tunué.
7th	***Demon Slayer Vol. 1*, Koyoharu Gotouge, Star Comics.**	7th	***Demon Slayer Vol. 1*, Koyoharu Gotouge, Star Comics.**
8th	***One Piece – Celebration edition*, Eiichiro Oda, Star Comics.**	8th	***Demon Slayer Vol. 22*, Koyoharu Gotouge, Star Comics.**
9th	***Demon Slayer Vol. 17*, Koyoharu Gotouge, Star Comics.**	9th	***Demon Slayer Vol. 2*, Koyoharu Gotouge, Star Comics.**
10th	*Heartstopper*, Alice Oseman, Mondadori.	10th	*La profezia dell'armadillo – Artist Edition*, Zerocalcare, Bao Publishing.
11th	***Demon Slayer Vol. 18*, Koyoharu Gotouge, Star Comics.**	11th	***One Piece – New edition*, Eichiiro Oda, Star Comics.**
12th	***Demon Slayer Vol. 2*, Koyoharu Gotouge, Star Comics.**	12th	*Il libro delle risposte,* Pera Toons, Pon Pon Edizioni.
13th	***Demon Slayer Vol. 19*, Koyoharu Gotouge, Star Comics.**	13th	***Dragon Ball Super Vol. 18*, Toriyama Akira, Star Comics.**
14th	***Demon Slayer Vol. 3*, Koyoharu Gotouge, Star Comics.**	14th	***Demon Slayer Vol. 3*, Koyoharu Gotouge, Star Comics.**
15th	*La profezia dell'armadillo – Artist Edition*, Zerocalcare, Bao Publishing.	15th	*Chi ha ucciso Kenny,* Pera Toons, Tunué.

Figure 1.3: Ranking of the Best-selling Comic Books in Italy during 2022 and 2023. Source: Giornale della Libreria, AIE, 2022; Giornale della Libreria, AIE, 2023.

Looking at the rankings just presented, it is interesting to note how some famous manga titles have achieved high positions in the years just concluded. In particular, the work of Koyoharu Gotouge, *Demon Slayer* (鬼滅の刃, *Kimetsu no Yaiba*), has recorded excellent sales figures in Italy, with several volumes achieving noteworthy positions in the charts. The annual ranking also features titles from two long-running series, *One Piece* and *Dragon Ball*, whose special editions have clearly generated significant profits in past years. These particular re-releases, often published in extended and more elaborate formats compared to the original editions, are typically tied to the promotion of specific events or milestones. For example, the "One Piece Celebration Editon" found in 8th place in the 2022 ranking, was a brilliant marketing technique by the publishing house Star Comics (which holds the publication rights of the saga), on the occasion of the publication of the 100th volume of "One Piece" in the new format. The volume immediately preceding it, number 99th also published by Star Comics, contained the thousandth chapter of the incredible pirate story. The 2022 special edition featured a limited-edition box set containing the 100th volume of "One Piece" with a custom dust jacket, a large poster elegantly enclosed in a scroll, a personalized fabric bracelet, and most notably, an original message in Japanese from Oda Eiichiro expressing his gratitude to millions of readers.[73] The increased price and limited print run of this edition did not deter fans of the saga, as evidenced by the excellent sales figures reported by the aforementioned AIE data. In the Italian publishing market, special editions are generally not restricted to novels but include comics and graphic novels as well. Beyond the case of "One Piece", this sale strategy is exemplified by "La Profezia dell'Armadillo - Artist Edition" by Roman comic artist Zerocalcare, published by Bao Publishing to mark the tenth anniversary of the first edition, which ranked fifteenth in 2022 and tenth in 2023. Regarding comic book sales in 2024, official data has not been released. However, it would be safe to say the positive trend for manga sales has continued uninterrupted, as the latest Giornale della Libreria (GdL) monthly ranking places Ōda Eichiro's *One Piece*, Akutam Gege's *Jujutsu Kaisen* (*呪術廻戦*), Tatsu Yukinobu's *DanDaDan,*(ダンダダン), Fujimoto Tatsuki's *Chainsaw Man* (チェンソーマン), and Toriyama Akira's *Dragon Ball* all between the top twenty positions.[74] The statistics become even more interesting if we consider that the rankings presented do not include sales data from comic bookshops, which in Italy serve as the primary hubs for manga distribution and more. In many cases, specialty comic bookshops offer a variety of services, selling not only comics and graphic novels of various genres but also board games, collectable trading card

[73] *ONE PIECE N. 100 - CELEBRATION EDITION*, in "Star Comics", 18 February 2022. https://www.starcomics.com/news/one-piece-n-100-celebration-edition, 09-02-2025.
[74] *Fumetti - Classifica di gennaio 2025*, in "Giornale della Libreria", https://www.giornaledellalibreria.it/pagina/classifica-di-gennaio-2025-6491.html 14-02-25.

games, and providing spaces for in-store gaming. As a result, they have become physical places for fans to get together. However, over the years, and especially due to the pandemic, these shops have suffered significant economic losses due to the growth of online markets and lockdown restrictions.

The aforementioned Figures support the idea that in recent years the interest in Japanese literary products, in this case manga, has increased exponentially in Italy. However, while manga have undoubtedly undergone a notable and unexpected rise in sales recently, inverting the stagnation trend experienced after the first boom in the 1990s and early 2000s, the parameters used to measure sales are questionable.[75] As mentioned above, this leaves the real cultural influence of manga in Italy unexplored, as this compartmentalized categorization disregards the differences in genre and pricing, and manga consumption patterns. Some argue whether manga can even be considered part of Japanese literature, although the foreign literature category is the most widely used one overseas for analysing manga. The problem lies in the book industry. In Japan, the manga field is a separate subset of the larger book market, and even in the United States manga are categorised exclusively alongside graphic novels.[76] The foreign fiction demographics are likely different from that of comics, and especially in Italy, where manga is primarily sold at specialized bookshops, it is probable it attracts an even larger audience than what official organizations have calculated.

As stated in previous sections, manga distribution in Italy has been primarily driven by readers. Its current "invasion" of the Italian editorial market has been the result of publishers' decision to exploit the wave of nostalgia and the enduring passion for Japanese characters in the general public. Today, manga continues to captivate not one, not two, but three generations of dedicated readers. For many, it helps to create a personal cultural identity, and tightens fan communities who come together to celebrate their interests across the country and internet spaces. One of manga's defining strengths, in fact, is its ability to create an emotional connection between fictional characters and readers. Naturally, this doesn't apply exclusively to manga artists, as Japanese novelists are notorious for their immersive works, which elicit emotional, moral and psychological development in the readers through their characters. This level of intimacy and relatability is something that European and American works sometimes fail to achieve, if not for graphic novels that adopt a deeply persona, diary-like format.[77] So, has the increased publishing of manga been determined by psychological factors which in time drove demand, or was it due to the effects of globalization? Does globalising manga change not only markets, but also the perception of Japan's national

[75] PELLITTERI, *I manga…*, cit.
[76] Casey E. BRIENZA, *"Books, Not Comics: Publishing Fields, Globalization, and Japanese Manga in the United States"*, in Jocelyn Hargrave (curated by), *Publishing Research Quarterly Vol. 25*, New York, Springer, 2009, pp. 109
[77] PELLITTERI, *I manga…*, cit.

identity? Not entirely. According to Casey E. Brianza, there is an irreducible distance between different people and different cultures that globalization cannot bridge. On the level of content, manga preservers its Japanese authenticity. However, as manga becomes absorbed into the book industry, and the public gets accustomed to its presence in the market, readers will slowly lose the perception of its cultural origins.[78]

1.3.2. Japanese literature in Italy.

In Italy, more than 68 thousand editorial novelties are published every year, and over 1,5 million titles are currently on the market. Figure 1.3 shows the fifteen best-selling foreign fiction novels in Italy in 2022 and 2023 (Source GdL, AIE). It is worth noting that the evaluation criteria exclude titles sold through special promotions, such as bundled offers with different ISBNs, as well as loose titles or limited editions sold exclusively through specific channels during special events or for limited periods. The rankings include novels by foreign authors, genre fiction (adventure, fantasy, science fiction, romance, horror, thrillers, and mysteries, among others), poetry, theatre plays, non-fiction, travel reportages, and Young Adult (14+) fiction by foreign authors. Additionally, original-language publications released by foreign publishers are also included.[79] From these findings, it is evident that novels by Japanese authors, beyond the well-known masters like Haruki Murakami and Banana Yoshimoto, whose works are commonly seen on bookstore shelves, have achieved impressive sales figures in Italy in the last three years.

	2022		**2023**
1st	*Il caso Alaska Sanders*, Joël Dicker, La nave di Teseo.	1st	*Dammi mille baci*, Tillie Cole, Always Publishing.
2nd	*It ends with us. Siamo noi a dire basta*, Colleen Hoover, Sperling & Kupfer.	2nd	*Le armi della luce*, Ken Follett, Mondadori.
3rd	*Violeta*, Isabel Allende, Feltrinelli.	3rd	*Il vento conosce il mio nome*, Isabel Allende, Feltrinelli.
4th	*La canzone di Achille*, Madeline Miller, Marsilio.	4th	*Atlas. La storia di Pa' Salt. Le sette sorelle.* Lucinda Riley, Harry Whittaker, Giunti Editore.
5th	***Finché il caffè è caldo*, Toshikazu Kawaguchi, Garzanti.**	5th	*It starts with us. Siamo noi l'inizio di tutto.* Colleen Hoover, Sperling & Kupfer.

[78] BRIENZA, "*Books, Not Comics…*" p.115
[79] *Le classifiche del GDL dei libri più venduti*, in "Giornale della Libreria", cit.

6th	*Cambiare l'acqua ai fiori*, Valérie Perrin, E/O.	6th	*Cambiare l'acqua ai fiori*, Valérie Perrin, E/O.
7th	*Una vita come tante*, Hanya Yanagihara, Sellerio Editore.	7th	***Se i gatti scomparissero dal mondo*, Genki Kawamura, Einaudi.**
8th	*Circe*, Madeline Miller, Marsilio.	8th	*Come uccidono le brave ragazze*, Holly Jackson, Rizzoli.
9th	*Come uccidono le brave ragazze*, Holly Jackson, Rizzoli.	9th	***Finché il caffè è caldo*, Toshikazu Kawaguchi, Garzanti.**
10th	*Follia*, Patrick McGrath, Adelphi.	10th	*Holly*, Stephen King, Sperling & Kupfer.
11th	*Delitti a Fleat House*, Lucinda Riley, Giunti Editore.	11th	*Follia*, Patrick McGrath, Adelphi.
12th	*La mascella di Caino. Il puzzle letterario più diabolico del mondo*, Torquemada, Mondadori.	12th	*Un giorno questo dolore ti sarà utile*, Peter Cameron, Adelphi.
13th	*Dammi mille baci*, Tillie Cole, Always Publishing.	13th	*La canzone di Achille*, Madeline Miller, Marsilio.
14th	*Il quaderno dell'amore perduto,* Valérie Perrin, Nord.	14th	*Il passeggero*, Cormac McCarthy, Einaudi.
15th	*La verità sul caso Harry Quebert,* Joël Dicker, Bompiani.	15th	*La piena. Blackwater*, Michael McDowell, BEAT.

Figure 1.4: Ranking of the Best-selling Foreign Fiction Books in Italy during 2022 and 2023. Source: Giornale della Libreria, AIE, 2022; Giornale della Libreria, AIE, 2023.

In 2022, Kawaguchi Toshikazu's novel "Before the Coffee Gets Cold" (コーヒーが冷めないうちに, *Kōhī ga samenai uchi ni*), published in Italy with the title "Finchè il caffè è caldo" by Garzanti Editore, reached fifth place in the sales ranking. The internationally bestselling series is comprised of 5 volumes, and it was first published in Italy in 2020. The following volumes were published, also by Garzanti, shortly thereafter, the second one in 2021, the third in 2022, and the fourth in 2024. However, Kawaguchi's series, based on a play which premiered in March 2010 led by the author himself, began printing in Japan back in 2015 by Sunmark Publishing.[80] Despite its national immediate success, it took some before it could reach overseas audiences (for instance, it was

[80] *Before the Coffee Gets Cold*, in "Wikipedia.org". https://en.wikipedia.org/wiki/Before_the_Coffee_Gets_Cold#:~:text=The%20story%20originally%20began%20as,by%20Picador%20in%20September%202019. 03-01-25

published in the UK and the US by Picador/Macmillan in 2019), and one is left to wonder if this interest towards Japanese literature has seen an increment in recent years.
The chart for the following year 2023, seems to confirm this trend. Out of the fifteen best-selling foreign fiction novels listed, another one had entered the chart, Kawamura Genki's "If Cats Disappeared from the World" (世界から猫が消えたな, *Sekai kara neko ga kietanara*), coming in at 7th place. Kawamura is a young Japanese author behind many modern-day masterpieces: on top of writing several novels, he also produced internationally acclaimed films such as "Your Name" (君の名は, *Kimi no na wa*, directed by Shinkai Makoto, 2016) or "The Boy and the Beast" (*Bakemono No Ko*, directed by Hosoda Mamoru, 2015). The novel was first published in Japan in 2012 by MAGAZINE HOUSE.[81] Kawaguchi Toshikazu's bestselling series' first volume, "Before the Coffee Gets Cold", was also between the top ten, placing in 9th position. Although ranking of best sellers of foreign fiction for the year 2024 is not yet available, the most recent data from last December 2024 (AIE), report the presence in the ranking of several authors from different Asian countries – not just Japanese. In fourth place in the end-of-year ranking is "The Vegetarian" (2007), by South Korean and Nobel Prize for Literature 2024 winner Kang Han, published in Italy by Adelphi in 2016. Immediately after in fifth place is Murakami Haruki with his most recent novel "The City and Its Uncertain Walls", published worldwide in 2024, in Italy by Einaudi. In eleventh place, the novel by Indian author Nilanjana Roy "The Wildings" (2012), published in Italy by Libreria Pienogiorno in 2024. After that, two other novels by Nobel Prize for Literature winning author Kang Han, are ranked respectively in seventeenth and eighteenth place: "Greek Lessons" (2011) and "We Do Not Part" (2021). Kawamura Genki's "If Cats Disappeared from the World" placed 22nd in December's chart.[82]

Bookstores weren't the only outlets which experienced the recent growing interest in publications concerning Japan. A phenomenon equally worth mentioning is the steep increase in sales of Japanese literature collections available at local newspaper kiosks.

In recent years, countless collections of Japanese literary works have been published by various Italian newspapers, in collaboration with equally as many publishing houses. Leading publications in the market, such as *Corriere della Sera*, *La Repubblica*, *Il Sole 24 Ore*, *Il Giornale*, *Panorama*, *L'Espresso*, or *Sorrisi e Canzoni*, to name a few, have long been committed to publishing works from a wide variety of genres, which are primarily distributed to the public as supplements to their

[81] *If Cats Disappeared from the World*, in "Wikipedia.org" https://en.wikipedia.org/wiki/If_Cats_Disappeared_from_the_World 02-01-25
[82] *Classifica di dicembre 2024*, in "Giornale della Libreria", 2024 https://www.giornaledellalibreria.it/pagina/classifica-di-dicembre-2024-6436.html 22-01-25

periodicals sold at newsstands. This sales strategy has been in use for decades: the first notable instance dates back to 2002 with the publication of "Il Nome della Rosa" by Umberto Eco, published in the series "I Grandissimi del Novecento", as supplement to "*La Repubblica*".[83] The concept behind this strategy is simple and effective: supplements boost newspaper sales while simultaneously encouraging customers to purchase additional volumes to complete the collection. Moreover, when talking about books as newspaper supplements, it is important to emphasize that they are often not insignificant works, warehouse stock, or remainders, but rather encyclopaedias and literary works of significant value and importance. Readers are drawn to works of various genres, printed in elegant yet practical editions, and sold at the affordable price of no more than 12,90 euros.[84] Given that these are typically encyclopaedias consisting of 16-20 volumes, in just a few months readers can accumulate an entire new encyclopaedia for a total cost of around 200 euros. The first volume is sold at a significantly reduced price to encourage the consumer to embark on the investment, after which, usually by the second or at best third volume, prices increase and adjust for the remaining releases. From there on after, it is up to the consumer to decide whether to bear the cost of the entire work or accept having gaps in their collection, which, by the way, are easily identifiable by the publication number printed on the spine of the book. Completing a collection involves a modest expenditure, when compared to the hypothetical cost of each individual volume if purchased through traditional channels, such as bookstores or online retailers. Publishers have clearly understood the need to find new strategies to sell their works and contrast the decline of newspaper sales, while offering a response to the needs of consumers, who are usually reluctant to spend on books and tend to cut cultural expenses, especially in times of economic crisis. The average newspaper consumer is most likely also a book reader. In Italy, these categories often overlap, based on factors like education, geographical area of residence and age. As a result, such editorial initiatives find audiences inclined to develop an interest in the "book-object". Moreover, newsstands and bookstores have historically had a strong connection based on their role in circulating culture and information, which are codependent.[85] Considering the rapid increase in publications attached to newspapers offered since the beginning of the millennium, based on the model of *La Repubblica*, this strategy can be considered a resounding and profitable success for the entire Italian journalistic universe, which has since involved a large number of local newspapers with similar initiatives.[86] Newspaper promotions can be divided into two distinct categories: gadget

[83] Cristian VACCARI, *Il libro e il quotidiano: confronto tra le promozioni editoriali "I libri dell'Unità" (1992-1996) e "La biblioteca di Repubblica" (2002)*, Bologna, Università degli studi di Bologna, 2002, p. 47
[84] Raffaele FIENGO, L'Invasione delle Edicole: come un'iniziativa editoriale è diventata fenomeno nazionale, Padova, Università degli Studi di Padova, 2004, pp. 13-14
[85] VACCARI, *Il libro e il quotidiano…* , cit., . p.10
[86] FIENGO, *L'Invasione delle Edicole…*, cit. pp. 17-18

promotions and editorial promotions. Gadgets promotions are publications which involve the sale of various small-sized objects alongside newspapers, usually sunglasses, beauty products, toys, memorabilia and such. They mainly influence magazine sales, as they typically target children and female audiences. Editorial promotions, on the other hand, consist of pairing newspapers with editorial or para-editorial publications to enhance their appeal to readers. These promotions can be further classified into three types: aperiodic inserts, periodic inserts, and handouts. Aperiodic inserts are non-recurring publications whose success depends on public interest in the specific product and the effectiveness of the promotional campaign. Periodic inserts and handouts, however, have the objective of establishing a connection with readers, encouraging them to purchase the newspaper bundled with the insert. Supplements may be offered free of charge or sold at an additional cost. If sold, it is essential to determine whether the purchase of the insert is mandatory or optional. While mandatory purchases allow publishers to accurately predict print runs, they risk alienating customers who may not be interested in the accompanying newspaper.[87] Sometimes, it is not necessary for newspaper companies to release every volume in the plan as a supplement to the newspaper. Oftentimes, only the first 5 or 10 books are released at newsstands, while the rest are ordered by the customers themselves (who intend to continue and complete their collection) either through the newsagent, who will thereafter contact the distributor, or directly through the publisher's channels.

Although the phenomenon is widespread and books of various genres have been published as supplements, over the past few years (specifically since the beginning of the decade) both readers and newsagents have noticed a significant increase in the availability of materials related to Japan. Listed below are the titles of several collections of volumes dedicated to "Japan" (intended as a general term encompassing Japanese culture, literature, tourist attractions, and even cuisine) that have been made available for sale at newsstands in recent years.

Collection	Affiliated newspaper	Initial release	Total volumes
"Murakami"	Corriere della Sera	12/05/2020	25
"La grande Letteratura Giapponese"	Corriere della Sera	11/05/2021	25
"Giappone – Storia Cultura Stile di Vita"	IO Donna	16/06/2022	20
"Giappone – Crimini e Misteri"	Corriere della Sera	18/10/2022	12
"Capolavori della Letteratura Giapponese"	La Repubblica	02/02/2023	20

[87] VACCARI, *Il libro e il quotidiano…,* pp. 4-7

“Giappone – Cultura e Tradizioni”	Corriere della Sera	18/03/2023	35
“Essenza Giappone”	TV Sorrisi e Canzoni	16/04/2024	14
“Profondo Giappone”	La Repubblica	03/08/2024	10
“Miti e Leggende del Giappone”	Edizioni RBA*	20/08/2024	70
“Giappone d’autore”	TV Sorrisi e Canzoni	24/09/2024	26
“Il manga di Osamu Tezuka”	La Repubblica	28/12/2024	24
“Giappone Contemporaneo”	Il Corriere della Sera	16/01/2025	20

Figure 1.5: Titles of book collections regarding Japan sold at newsstands as supplements to newspapers from 2020 onwards. Source: Edicola Amica.

**Edizioni RBA* books, although sold at newsstands, are published independently from newspapers or magazines.

It is clear the feelings of readers and newsagents were not unfounded. In recent years there has indeed been a significant increase in the publication of collections of volumes concerning Japanese culture, history, and especially literature. This adds to the recent wave of independent publications by publishing houses that treat “Japan” as a broad theme. Nowadays, in almost every bookstore there is a section dedicated to books on the countries of East Asia. On the shelves you can no longer find exclusively the literary works by the great Japanese masters, but also cookbooks, books on feudal history, descriptions of religious practices, and meticulous itineraries of the most famous cities in Japan. Of course, the phenomenon is not limited to Japan, but extends to South Korea, China, Thailand, and other Asian nations.

The gross income of such promotions is determined by the selling price of the newspaper and the cost of the supplement itself. The primary costs of an editorial initiative include:

1. Design costs: all expenses related to the conceptualization and overall layout.
2. Production costs: such as copyright fees (if applicable), paper, compositing, graphics, printing and packaging.
3. Distribution costs: newsstands share, transport, additional discounts to distributors.
4. Advertising costs: all expenses for marketing and promoting the initiative.
5. Additional costs: for extra supply of either the newspaper or the supplement.

These publishing costs can be categorized as either fixed or variable. Fixed costs include design, copyright, editorial, graphics, editing, composition, and advertising expenses, while variable costs

encompass all other items on the list.[88] The significant number of publications about Japan sold as newspaper supplements in recent years indicates that the cost-income ratio for this type of insert has been highly favourable. This suggests that such editorial initiatives were not only economically viable but also well-received by a varied target audience.

1.3.3. Answers to a pre-existing demand for Japanese works?

Around the late 1990s, while in the rest of the world manga, classified as graphic novels, was becoming an integral part of general bookstores' supply, the Italian publishing industry showed little interest in promoting them. Given the already quite substantial domestic comic market, publishers were reluctant to invest in a genre which would have most likely limited print runs, compared to the significantly higher circulation of "traditional" comics, widely available at the hundreds of thousands of newsstands scattered across the peninsula.[89] Production costs for comics are relatively low, and while the audience is smaller compared to other media, it is more engaged. Until a decade ago, the Italian comic book industry used to struggle with product innovation, and has always privileged long-time readers over casual readers. Although Italy can pride itself on the network of specialized comic bookstores, their environment is often exclusive to Euro-American comic book *connoisseurs* and predominantly male audiences. For a long time, comics represented an area where supply for certain demographics has been overlooked, particularly the female public. Only when manga was introduced to Italy and became widely available did women start to re-enter certain spaces. Whereas in Japan and other Asian countries demand is segmented almost exclusively by age, in Italy and other European nations it is influenced by origin, style, layout and themes. Not only is there a substantial difference between demand in continental Europe and the rest of the world, but also across European nations themselves, despite their similar cultural roots.[90]

When manga first entered European and U.S. markets, reception was quite underwhelming, as publishing houses were underprepared. American and European comics generally follow the single-issue format, as such, their narrative pacing is suited to the single-volume page count and release schedule.[91] On the other hand, for the most part, manga does not follow this format. Most popular serials appear in weekly or bimonthly magazine anthologies in Japan and are intended to be consumed at a faster pace, as they typically require one hour of reading. Due to the (at times excessive) amount of localization adjustments and adapting that publishing manga required,

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[88] Ibid.
[89] BERTUCCI, *Il mercato del fumetto…*, cit., p.44
[90] Matteo STEFANELLI , *Crowdfunding per fumetti*, in "il Post", 23 February 2012 https://www.ilpost.it/matteostefanelli/2012/02/23/crowdfunding-fumetti-kickstarter/ 03-02-25
[91] BRIENZA, *"Books, Not Comics…",* cit. p.108

publishers released an average of one volume per series every six months. At that rate, a lengthy series would have taken a very long time to be completed. For instance, Toriyama Akira's *Dragon Ball*, which comprised 42 volumes, would have taken over twenty years to finish publishing.[92] This unsustainable publishing schedule tested the patience of even the most devoted of manga readers, so much so that fans started to joke about how old one would have been by the time certain series ended.[93] As manga were marketed primarily at teenagers, publishers couldn't afford to lose their reader base as fans grew older and lost interest in the product. Not to mention, publishers who decided to sell manga generally agreed on avoiding the use of the term "manga" as much as possible.[94] When major publishing companies started to distribute manga across Europe and the U.S., interested in expanding their revenue sources as much as possible, they preferred to release graphic novel editions of manga and direct marketing towards children, overlooking their Japanese cultural origins.[95] Moreover, manga fans are known for having high expectations. Generally, they prefer adaptations of their favourite stories to be as close as possible to the original material. In the 1990s, the preferred method for adapting manga for overseas audiences was 'flipping': the technique requires editors to mirror each page while avoiding altering too significantly the speech balloons.[96] Unfortunately, this technique often entails unrealistic details and disrupted story flow. Even manually rearranging each frame and redrawing the necessary parts didn't solve the issue, as it was too cost-prohibitive and time-consuming. When around the turn of the millennium a new graphic format emerged, manga started to be advertised as "100% authentic", therefore closer to the original versions by preserving the right-to-left reading arrangement, names of the characters unaltered, and onomatopoeia included in their Japanese version. This was in the hopes of pleasing not only bookstores that required more stock, but also Japanese licensors that demanded less editing of their original works, and readers all at the same time, by providing a faster release schedule. As these format changes were naturally more cost-effective in terms of labour and production, manga publishers started to release one volume per month.[97] To summarise, market growth was initially slow, with only select titles printed in their original Japanese format to cater to devoted fans. However, levering such an audience, around the early 2000s price and format standardization allowed publishers to promote manga as more authentic than it had been before, by maintaining the original features. This unprecedented new approach not only made manga publishing much cheaper,

[92] Casey E. BRIENZA, "Paratexts in Translation: Reinterpreting 'Manga' for the United States", in *The International Book of Journal* Vol. 6 No. 2, Melbourne, Common Ground Publishing, 2009. P.14.
[93] BRIENZA, "Books, Not Comics…", cit. p.108
[94] Ivi, p. 14
[95] Ivi, p. 112
[96] Ivi, p. 108.
[97] BRIENZA, "Books, Not Comics…", cit. p.111

but also successfully attracted more consumers, who had been demanding more accessible Japanese content for a long time. The emphasis on preserving authenticity was well-received by both manga artists and publishers, who previously resented the suggestion of modifying their creations to cater to foreign readers. The results are evident if we consider the contemporary editorial market, where publishing licensing deals with Japan surged, and manga is more popular than ever.

In recent years, small and medium-sized publishing companies have gained relevancy in the market by deciding to publish what major publishing groups had not shown interest in. For this reason, smaller publishers have gained a certain prestige. In the absence of decisive investments from renowned publishers that could have determined a real expansion of the market, it has been the medium and small publishing companies that have played a driving role, becoming true points of cultural reference for products which wouldn't have been available otherwise. Fortunately, the efforts of smaller publishers, combined with the increased media attention received by graphic novels and the success of foreign products such as manga, have reawakened the attention of other more influential publishers, leading to a series of new corporate investments.[98] According to industry researchers, Japanese publishers are interested in Italy because of the number of licensing rights to titles which it acquires from foreign publishers, and the amount of new products being sold at an increasingly fast pace, despite the ongoing global economic crisis.[99] The Italian publishing industry has been growing in the past years (according to Statista, it registered +3,4% in 2023) primarily due to the acquisition of digital distribution rights from important publishing companies and their partnership with online distributors. This applies to the entire publishing sector, including the comic book market. The Italian publishing market is characterized by cyclical trends that last approximately ten years, usually divided into periods of decline lasting three to four years, followed by periods of recovery (sometimes unexpectedly rapid) when a particular genre of product reawakens the interest of the readers' audience. Given that the Italian comic book readership is mainly composed of adolescents, this cyclical trend may correspond to the alternation of generations.[100] In my opinion, this has been the case for literary works related to Japan and its culture which experienced a surge in publications and public appeal since the beginning of the decade, especially manga.

Overall, manga's popularity has always been primarily driven by its fans. Even before the official international releases, fans have built extensive anime and manga online communities, discussion

[98] BERTUCCI, *Il mercato del fumetto…*, cit., p. 45
[99] Ivi., 44
[100] Daniele BARBIERI, "Il fumetto in Italia", inedito. Relazione presentata al Convegno *Contemporary Italy: The Construction of Identities*, Warwick University, Warkick, 1995. p.1

forums, and fan websites that provide pirated copies. The advent of the internet amplified this demand for Japanese media and fostered a massive fandom, although Japan was relatively slow in embracing international popularity, and even more so were Italian publishers. Interestingly, as mentioned previously fans tend to prefer content that isn't specifically catered to them, but on the contrary, that remains as close to the original as possible. This proves the global cultural appeal of manga and its influence not only as a media representative of Japan, but also in the creation of communities interested in cultural exchange and enrichment. Rather than cultural erasure or essentialisation, manga fans seek explanations for the cultural references they encounter while reading, reflecting their genuine interest in Japanese culture with their consumption choices.[101]

[101] PROUGH, "Marketing Japan…", cit. p. 63

Chapter 2
Analysis of the Japanese Publishing Industry.

2.1. Introduction to the Operational Framework.

How does manga shape the Japanese Publishing Industry? What role does it play in influencing market trends, and how has its popularity evolved in recent years?

The Japanese publishing industry is one of the largest publishing markets in the world, amounting to 1.6 trillion yen in 2023.[1] Its products, especially manga, are widely popular in hundreds of nations. The manga industry accounts for one-third of the total market revenue. Additionally, it is a very adaptive industry, as it caters to consumers and relies on their feedback to pursue editorial projects. Recently, it has been reinventing itself in response to the new global fascination with Japan's culture. Today, the industry faces many challenges, including the post-pandemic decline of bookstores, unregulated manga piracy and the decreasing sales of printed materials. Despite these difficulties, as literary products manga have effectively become a cultural symbol of Japan, are an essential export, and are now globally recognised.

This second chapter will examine the influence of manga in shaping the Japanese publishing industry in the last few years. To achieve this, an initial introduction about the industry's operational framework will be provided, presenting distribution channels, legal regulations, and the current state of bookstores. Following this, the focus of the chapter will shift to the importance of manga within the industry, presenting recent market data and exploring the cultural effects of popular works around the world. Chapter 2 will conclude with an analysis of advertising expenditure data and present a thorough discussion of the challenges faced by the industry, particularly content piracy.

[1] Statista Research Department, *Publishing industry in Japan - statistics and facts*, in "Statista", 2023, https://www.statista.com/topics/9291/publishing-industry-in-japan/#topicOverview 01-02-25

2.1.1. Distribution routes.

How does the Japanese publication distribution system work? This section offers an introduction to the Japanese publishing distribution system and analyses the characteristics of its structure. The integral framework of the distribution system is presented in Figure 2.1 below.

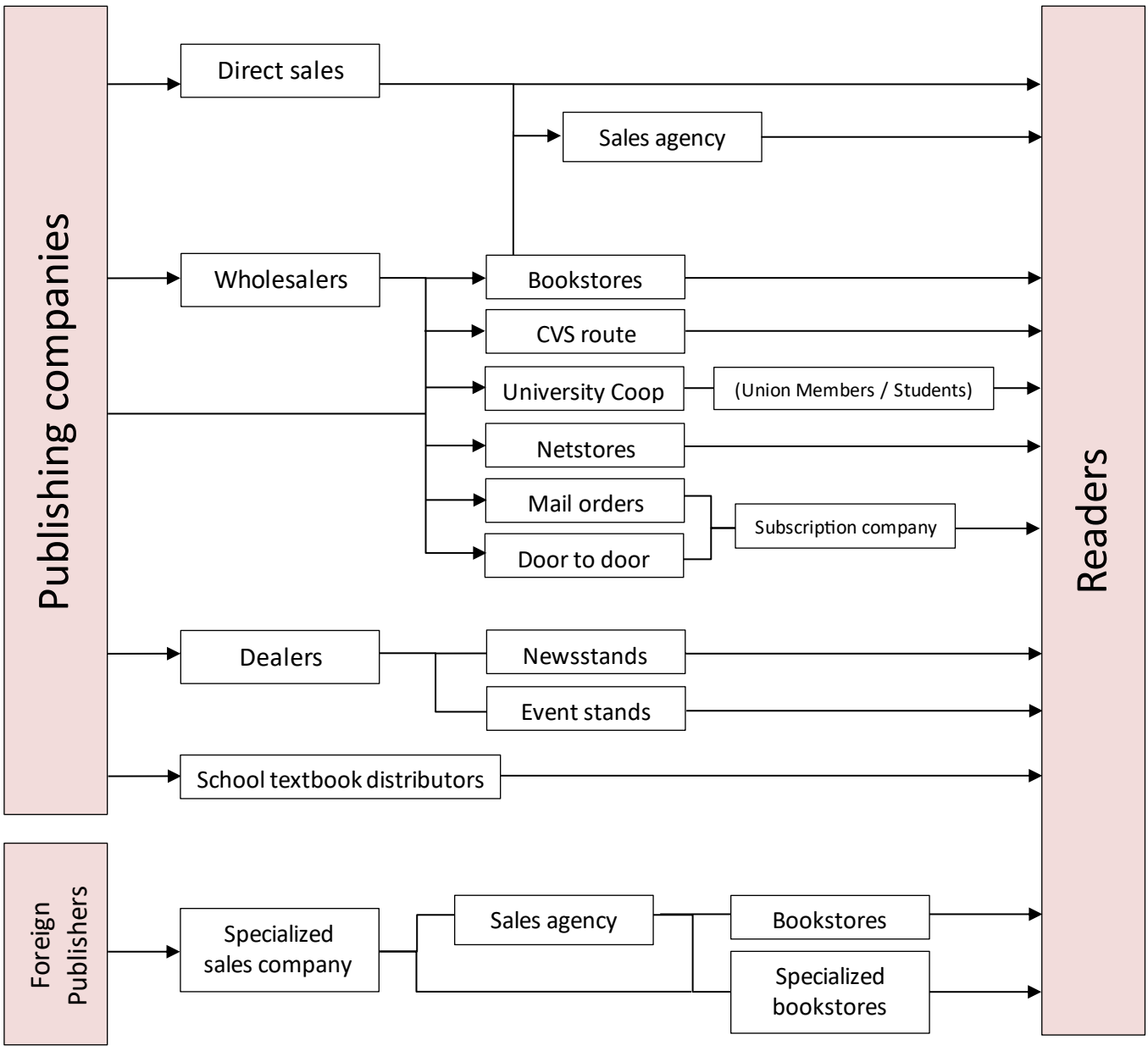


Figure 2.1: Distribution routes of the Japanese publishing industry.
Source: Japan Book Publishers Association (JBPA), Che Sung Hye「出版産業の変遷と書籍出版流通」

Similarly to the Italian case, the typical publication process is either direct or generally involves mediation by agents and bookstores. Once the product is published, it is delivered to a wholesaler, which then distributes it to bookstores, making it available to readers.

Other equally popular publication routes include the "Consumer Value Stores" (CVS) route and the "Netstore/Home Delivery Service" route. The "CVS" route, which generates over 100 billion yen in annual publication sales, operates as follows: publishers provide printed products to agencies, which then supply them either to the internal sales department or directly to convenience stores (CVS), where they become available to customers.[2] In Italy, where convenience stores are not locally present, this distribution route could perhaps be compared to the 'newsstands/kiosks' one. Another viable option, the "Netstore/Home Delivery Service" route, experienced exponential growth in recent years due to the prolonged effects of the pandemic on online retailing. Publishing companies supply their products to online distributors, which are then swiftly delivered directly to customers' homes. Sometimes this process will happen through the mediation of a sales agency, but the number of publishers either creating their own online stores or dealing directly with major retailers (namely Amazon) is steadily increasing. When approaching media exportations, foreign publishers work in close contact with Japanese specialized sales companies, in charge of acquiring the licensing rights, translating and adapting the products, and then selling them either through traditional channels, or specialized bookstores. Publishers do not necessarily choose a singular distribution route, on the contrary, the more routes are pursued, the greater the revenues. Each distribution route allows publishers to access different demographics, and profit margins vary accordingly. For instance, manga magazines follow primarily the "CVS" route: on a periodical schedule (generally weekly, biweekly, or monthly) magazines are released in hundreds of thousands of *konbini* (convenience stores) scattered all over the country, and displayed on shelves by the entrance of each one. According to the Japan Franchise Association (JFA) there are more than 57.000 *konbini* in Japan, and the three market leaders Seven-Eleven, Family Mart, and Lawson.[3] As of January 2024, Seven-Eleven was the leading convenience store operator in Japan, with more than 21.000 stores throughout the country.

The major publishing companies in Japan, according to the latest data available, are (in order) Shueisha, Kodansha, Kadokawa and Shogakukan.[4] A distinctive characteristic of the Japanese publishing industry is the dominance of a few major wholesalers in the entire industry, which account for over 70% of the country's publishing distribution. In contrast, European publishing

[2] Sung Hye CHE, *Shuppan sangyō no hensen to shoseki shuppan ryūtsū* (Changes in the publishing industry and book publishing distribution), 1st edition, Wakayama, SMP Mediapal, 2006. P. 148
蔡星慧 (チェソンヘ) 『出版産業の変遷と書籍出版流通』、第 1 版、若山、出版メディアパル、2006 年. 148 頁
[3] Konbiniensusutoa tōkei dēta, コンビニエンスストア統計データ (Convenience store statistics) Japan Franchise Association, https://www.jfa-fc.or.jp/particle/320.html 09-02-25
[4] Statista Research Department, Leading publishing companies in Japan in 2021 and 2022, based on sales, in "Statista", https://www.statista.com/statistics/864958/japan-major-publishing-companies-based-on-revenue/ 01-02-25

systems since the turn of the millennium have tended to be more diversified, with publishers and bookstores often handling direct sales.[5] Unlike Japan, where a comprehensive distribution system is in place, books and magazines in the European Union are categorized before distribution. Publishers typically directly manage the distribution or act as agents for distribution companies: the well-established publisher-driven approach is the feature that majorly differs from the Japanese distributor-led network, where wholesalers play a central role. In Europe, the role of wholesalers is merely a supporting role in the publishers-led distribution channels. Moreover, distribution companies directly affiliated with publishers in Japan have a system in place to distribute their own products as well as those of other publishers, including small and medium-sized companies. Within Japan's wholesale-centred distribution model, the return rate used to be around 10%.[6] To improve these numbers, researchers have stated it may be beneficial for Japanese publishers to look at international models where wholesalers play a more supportive role, mainly by switching to a distribution system where supply agencies are operated strictly by the publishers. In the last fifteen years, publishers have started to change their distribution models, to maintain better control of their sales channels and access more detailed data on how their products move through the industry to reach readers. In Europe, publishers, distributors and bookstores have cooperated to develop a system that specialises in processing standard bookstore data and online orders, which helps to streamline book distribution. A shared database for the publishing industry allows for stock availability management and faster responses to orders, as most of the distribution transactions are conducted directly between publishers and bookstores. Additionally, the European approach has proved to lower return rates. To summarize, the industry has improved in certain areas by introducing new distribution models, drawn from the European system, for example, by creating an online database to monitor bibliographic data, return rates, and order statuses more efficiently. A comprehensive database, extended to individual readers both domestically and internationally, would grant access to book records to a larger group of people.[7] As small and medium publishers have limited capital, an online database helps to address restocking necessities and even allows readers to place direct orders. Specialised and small-scale publishers are often overlooked by major distributors, as they are instead circulated through regional and less-equipped distribution centres using the buy-out system. For this reason, especially in the past, they used to prioritise permanent deposits and rely heavily on bookstore displays to attract customers, which were longer than in regular points of sale. The changes in the distribution system, leaning closer to a pre-order buyout

[5] Sung Hye CHE, *Shuppan sangyō no hensen to shoseki shuppan ryūtsū* (Changes in the publishing industry and book publishing distribution), 1st edition, Wakayama, SMP Mediapal, 2006. p 147
[6] Ivi, cit. p.148
[7] Ivi, 149

model, ensured that the publication of specialized books with limited print runs could achieve a stable number of advance orders, reducing the return rate. In conclusion, whereas in Europe bookstores tend to be more involved in sales accounting, and direct business relationships between publishers and bookstores are central, Japan's industry fell behind on such changes, relying on outdated business models for a long time. This came at the detriment of smaller stores within Japan's publishing industry. A shared online book database not only facilitates collaboration between publishers, but also counters the threat to the market posed by the potential disappearance of such local retail outlets.

Lastly, a shift in workforce development is also necessary. The prevailing mindset in the industry throughout the last couple of decades has been that workers should learn their duties through intuition and personal experience, all the while keeping labour costs as low as possible to sustain the business. As a result, human resource strategies have remained underdeveloped for a long time. Today, editorial training centres in Japan are still rare. Institutions like the Japan Editors School (日本エディタースクール) and the Journalism Training School (ジャーナリズム専門学校) serve as editorial training centres which offer short-term programs, with support from the Japanese Book Publishers Association (日本書籍出版協会, JBPA) and the Publishing Workers' Union (出版労連).[8] However, greater focus must be dedicated to educating workers in the distribution sector. Distributors, as the intermediaries between publishers and readers, should be regarded as experts in their field and receive proper training. It is essential to reassess the value of those who contribute to the industry's success. Such recognition extends beyond individual organizations, and concerns the broader outlook of publishers, their relationship with distributors, and bookstores as a whole.[9]

Although there have been some changes in recent years regarding the process of manga creation and distribution, magazines still represent the focal point of manga circulation in Japan. The current magazine-centred publishing model originated during the transition from the small-scale book market of the Meiji era, and later evolved from the model focused on commercialization of the pre-war period.[10] Modern editorial companies, now regarded as major publishers, expanded primarily through magazine publications within a framework dominated by wholesalers. This structure developed during wartime under the "Nippai System". The "Nippai System" was a centralized distribution system, officially in act from 1941 to 1949.[11] Operated by the Japan Publishing

[8] Ivi. 150
[9] Ibid, p.150
[10] Ivi. p. 173
[11] Nihon shuppan haikyū 日本出版配給 (Nippon Publishing Distribution), in "Wikepedia.org", https://ja.wikipedia.org/wiki/%E6%97%A5%E6%9C%AC%E5%87%BA%E7%89%88%E9%85%8D%E7%B5%A6 22-12-24

Distribution Co., Ltd. (日本出版配給, abbr. 日配 *nippai*), which was a national policy company, it monopolized publishing distribution in Japan during and after the Pacific War. It was created by forcibly merging over 240 major distributors into a unified entity. Although technically a joint company, *Nippai* effectively played a significant role in speech censorship. Under the system, the distribution of all publications required formal approval from supervising authorities (the Bunkyō Association, the Ministry of Commerce and Industry, and the former Information Bureau), effectively placing it under government control. Following changes in name and operations after 1949, the cessation of Nippai's activities as the sole distributor led to severe repercussions for publishers, with many going bankrupt. To address this, Nippai became a parent company, facilitating the launch of several new distributors which remain major participants in the industry today.[12] To summarize, today's distribution structure essentially operates as a residual model of the Nippai system, where centralized control continues to favour magazine-centred publishing policies.

Unlike foreign countries where cultural policies have played a role in the development of the publishing industry, Japan's publishing sector has been evolving independently since the 1990s. Nonetheless, this independence has generated a latent perception that each branch of the industry operates autonomously. As a result, the industry continues to face significant challenges, apart from the distribution systems, also the lack of collaboration among companies across the supply chain, and the difficulties faced by small and medium-sized enterprises.[13] However, over time, several organizations have emerged as notable examples of progress within the industry. These include The Tokyo Bookshop Group (東京出版物卸業組合), The Japan Book Publishers Association (JBPA, 日本書籍出版協会), The Japan Magazine Publishers Association (JMPA, 日本雑誌協会), The Japan Publication Wholesalers Association (日本出版取次協会) and The Japan Booksellers Federation (日本書店商業組合連合会). These associations serve a critical role in identifying and addressing shared challenges within the publishing ecosystem. While they ideally function as hubs for dialogue and collaboration among publishers, distributors, and bookstores, they still face significant challenges.[14] The constantly evolving societal environment and the pressing need to adapt especially prove that much work remains to be done to realize their full potential.

[12] Ibid.
[13] CHE, *Shuppan sangyō no hensen…, cit.* p.182
[14] Ivi, p.182-83

2.1.2. Legal framework.

This section will discuss the main legislations which currently regulate physical bookstores. Japan's publishing industry relies heavily on two systems: the Consignment System, introduced before World War II, and the Resale Price Maintenance System (RPM), established postwar. Both systems remain subjects of persistent debate.

The "Resale Price Maintenance System" (再販売価格維持制度) in Japan, determines that publications are ruled as an exception according to the Anti-Monopoly Law amendment in 1953, which allows the continuation of customs, precedent to World War II, of selling publications at fixed prices. The "Anti-Monopoly Act" prohibits the fixing of resale prices, but from the standpoint of the promotion of culture and education, an exemption was granted for publications.[15]
For the publishers and booksellers in Japan, the "Resale Price Maintenance" policy enables the distribution of a wide variety of volumes while ensuring royalty payments, even in cases of limited print runs, and allows readers to purchase publications at stable prices nationwide, regardless of region. Since the agreement is not legally binding, it cannot effectively mandate publications to be sold at a fixed price, therefore the decision is left to the publishers themselves. Each publishing company manages voluntarily the terms of the agreement either with wholesalers or booksellers.[16]
Over the years, the Japanese Fair Trade Commission (FTC) has repeatedly called for a review of the policy to encourage free trade, generating ongoing discussions with Publishers about the system's maintenance. In 2001, both parties ultimately decided to leave the resale price system in place for the time being. Currently, the Publishing industry is working to improve distribution while promoting a more flexible application of the system by implementing different measures, such as expanding points of sale for special-priced books, introducing partial and time-limited resales, and offering discounts on annual magazine subscriptions.[17]

The Consignment System (新刊委託制度) is the currently prevailing method of selling publications in Japan. It allows physical book retailers to return unsold books within a set period of

[15] CHE, *Shuppan sangyō no hensen…, cit.* p.173-174
[16] HIGUCHI Seiichi (樋口清一), *An Overview of the Japanese Publishing Market and Changes in the Environment Surrounding Publishing,* presentation at TIBE2022, in "Japan Book Publishers Association" (出版科学研究所, JBPA), 2022, https://www.jbpa.or.jp/en/pdf/presentaionatTIBE2022.pdf , 17-12-25, p.18
[17] *Shoseki zasshi no `saihan seido'(teika hanbai seido) to wa?* (書籍・雑誌の「再販制度」（定価販売制度） とは？ What is the "resale system" (fixed price sales system) for books and magazines?), *in "Japan Book Publishers Association (JPBA)",* https://www.jbpa.or.jp/resale/#q1 10-12-24

time, typically around six months from the release day for new publications.[18] The arrangement is based on a tripartite contract between publishers, sales agencies, and bookstores.

The Consignment System enables booksellers of any category, especially smaller ones, to distribute a wide selection of titles with fewer financial risks. It also allows specialty bookstores to stock titles with smaller print runs or lower turnover rates. The policy is also effective for mass-market publication, which offers more choice to readers.[19] Due to its many benefits, the system is widely adopted by the majority of publishing houses in Japan. However, the system is not without its drawbacks. Overproduction can frequently create a large volume of returns: an increase in the number of books published yearly, particularly those without proper sales marketing, can lead to the saturation of the (already limited) bookstore space, shortening the display period of each publication.[20] This can ultimately pose the risk of readers missing the opportunity to discover new publications.

For these and more reasons, the publishing industry must continue to implement a responsible sales approach and transition to distribution models based on rationalising bookstore orders.

In a Consignment System, products will be sold by a third party. The third-party in charge receives a portion of the profits, either as a flat rate or as a commission. While free returns are allowed, in Japan the system has been criticized for its inefficiency and the overdependence on wholesalers it generates.

The "Fixed Book Price" (FBP) policy allows publishers to set one standardized price for books sold on a national scale. It can be enforced as a law, or as a mutual agreement between the industry's sectors. In Japan, publications are sold nationwide at fixed prices by an industry-wide agreement, which is a practice common in many other countries. The FBP policy is effective in Italy, where book prices are regulated by law, and in several other European countries, including France, Germany, Greece, Spain, Portugal, Austria, Slovenia, Luxembourg, Norway and the Netherlands. The International Publishers Association (IPA) is currently advocating for the extension of the FBP policy to e-books. Some countries (France, Germany, Israel, South Korea and Spain) have already applied the system for digital formats. However, in countries where the FBP still hasn't been applied for online distribution, there have been instances where a single e-commerce entity tends to dominate the market (in Europe, it's Amazon.com). It's important to note that allowing a

[18] HIGUCHI, *An Overview of the Japanese Publishing …*, cit. , p.22

[19] *Shuppan gyōkai o sasaeru seido (saihan seido to itaku seido)* - (出版業界を支える制度（再販制度と委託制度）, Systems supporting the publishing industry (resale system and consignment system)), in "National Publishers Association (APJEA)", https://shuppankagaku.com/knowledge/resale_entrust/ 09-12-25

[20] CHE, *Shuppan sangyō no hensen…, cit.* p.178

stakeholder monopoly over the market poses a serious risk of limiting what the public has access to, thereby limiting the cultural landscape.[21]

Japan's publishing industry, despite clear limitations, still operates on these systems. While they offer stability and predictability, they also hinder innovation and adaptability, particularly for small and specialized publishers. Without proactive reform from all industry branches, the paper industry risks further marginalization in an increasingly competitive global market.

2.1.3. Advertising expenditure and manga as consumer goods.

Why have people around the world embraced Japanese popular culture? Can manga's influence be linked to its specific style of representation, its themes, or its captivating storytelling? Or is it possible that manga's global success is the result of clever economic and marketing strategies, which leverage the international audience's interest in foreign products?

Advertising works as a method to transfer meaning to consumer goods, specifically, visual images and verbal material assume a very particular relationship in this transfer process. Text makes explicit what is already implicit in the image, which has to be then successfully decoded by the reader, responsible for the process of transfer. Through advertising, old and new goods continuously change from old to new meanings.[22] To this extent, advertising serves as a lexicon of current cultural meanings. There are many different methods of advertising in Japan, some of which are not as utilised in other countries. The main and most cost-effective is, naturally, online advertising. Other methods include traditional banners, affiliate advertising, newspaper inserts, TV or radio commercials, billboards, magazine advertising, free paper handouts, train advertisements, direct email and postal publicity, and call-centre telephone calls.[23] Another medium which is quite relevant in Japan but seemingly underused abroad is advertising manga.

In the last decade, manga has surpassed the status of entertainment medium to become also an advertising method. Today, it is widely used in business situations, and allows companies to approach new audiences more efficiently. Manga advertising, naturally, not only has great visual

[21] IPA editor, *Fixed Book Price, explained*, in "International Publishers Association (IPA)", 12 December 2013, https://internationalpublishers.org/fixed-book-price-explained/ 03-01-2025

[22] Grant McCRACKEN, "Culture and Consumption: A Theoretical Account of the Structure and Movement of the Cultural Meaning of Consumer Goods", Journal of Consumer Research, Vol. 13 No. 1, 1986, p.74

[23] Kōkoku manga seisaku no ryōkin sōba to wa? 16 Shurui no hansoku hiyō to tettei hikaku! 広告漫画制作の料金相場とは？16 種類の販促費用と徹底比較！(What is the average price for creating advertising comics? A thorough comparison with 16 types of promotional costs!), in "Manga Factory", https://manga-factory.net/column/1931 03-02-25

appeal but also good storytelling, which can help communicate to different audiences complex information while maintaining an easy-to-understand approach. In the current advertising industry, there are many formats of manga advertisement: web manga, manga pamphlets, custom illustrations, comic-style videos (CMs), manga for social media (SNS), and in-house manga (to distribute within a company). The appeal lies in the ability to convey information in an immediately recognisable way, which would otherwise be difficult to translate through text alone. Its costs range between 200,000 to 500,000 yen for five colour manga pages, and it has been steadily growing in popularity.[24]

The advertising industry as a whole has been registering higher and higher revenues since the beginning of the decade. Let us now discuss briefly the expenditure on publicity in Japan in the last few years.

The industry has been undergoing a period of major changes recently, because of the rapid growth of social media and video advertising. Since 2015, internet advertising has overtaken the four traditional media industries (newspaper, magazines, radio and television), and became the main medium. In addition to this, more recently social media advertising has grown at an unprecedented pace, overtaking even search engine-linked advertising, which was the mainstream up until the beginning of the pandemic. In the meantime, domestic demand for printing and communications had started to decline, mostly due to the spread of digitalization and an increasing number of customers deeming traditional print to be less cost-effective than digital marketing. Moreover, there has been a change in the printing workforce, as offset printing machines require specialised skills to be operated, and there is a lack of personnel competent and young who could replace the ageing workers, especially in rural areas.[25] On the other hand, the market size for e-books has been expanding each passing year, and it is believed that cross-media productions such as anime, television series, games, and movies, are also boosting sales.

In 2020, due to the Covid-19 pandemic and subsequent lockdown, total advertisement expenditure in Japan was 6.159.4 billion yen, down to 88% compared to 2019. It marked the first negative growth in years, since the 2011 disaster.[26] This period transformed expenditure significantly,

[24] Manga no arayuru katsuyō shīn o tettei kaisetsu (マンガのあらゆる活用シーンを徹底解説, A thorough explanation of all the different ways manga can be used), in "Manga Factory", https://manga-factory.net/column/7027 03-02-25

[25] Insatsu, kōkoku, shuppan gyōkai no genkyō 印刷、広告、出版業界の現況, (Current state of the printing, advertising and publishing industry), in "M&A Succeed", https://ma-succeed.jp/content/industry/corporate-services/I2Q01 03-02-25

[26] 2020 nen nihon no kōkokuhi (2020 年 日本の広告費 ,Japan's advertising expenditures in 2020), Dentsu. 2021 https://www.dentsu.co.jp/knowledge/ad_cost/2020/ 09-02-25

bolstering digital demand even further. Online advertising expenses were the first to recover from the negative trend and showed positive growth throughout the second half of the year. In 2021, Japan's total advertising expenditure was 6.799.8 billion yen. Of this, the total internet advertising expenditure was 2.705.2 billion yen, exceeding the total amount of advertising expenditure for the four mass media.[27] In 2022, the total expenditure reached 7.102.1 billion yen, marking a 4,4% year-on-year increase. By then, internet advertising expenditure had surpassed 3 trillion yen, although impacted by the rebound of Covid-19 infections and geopolitical issues such as the war in Ukraine.[28] In 2023 advertisement expenditure in Japan reached a record high of 7.316.7 billion yen. Included in this number is internet advertising, which amounted to 3,333,0 billion yen, nearly half of the country's entire expenditure on publicity, therefore driving the growth of the advertising industry as a whole. Analysing the publishing industry specifically, in 2023 a total of 55.82 billion yen was spent in the four traditional advertising categories, in line with other media industries. The estimated sales value of print publications in 2023 followed the previous years' downward trend. According to Dentsu, books were down at 95,3% and magazines at 92,1% compared to 2022. All the while, the electronic publishing market continued its rise, outperforming at 106,7% the numbers registered the previous year.[29] Despite the many ongoing risk factors, for instance, global instability and soaring labour costs, the magazine advertising sector started leveraging comic intellectual property and fan-based marketing strategies which ensured an increase of large-scale campaigns, both digital (on social media) as well as through physical events. Although the focus within the industry is continuously shifting towards digital content and overseas expenditures, it's fair to say that the sale value and cultural role of magazines and print media within society has not been ignored.

Effective advertisements tap into already existing cultural narratives, social trends, and shared values. In consumer culture, advertisements associate goods with cultural meanings by connecting products to societal ideals and trends, such as social status, gender roles, and lifestyle. For instance, advertisement that aligns with movements for environmental consciousness and promotes products as "green" or eco-friendly has proved to be a good marketing strategy to attract younger consumers,

[27] 2021 nen nihon no kōkokuhi (2021 年 日本の広告費 ,Japan's advertising expenditures in 2021), Dentsu, 2022. https://www.dentsu.co.jp/knowledge/ad_cost/2021/ 09-02-25
[28] 2022 nen nihon no kōkokuhi (2022 年 日本の広告費 ,Japan's advertising expenditures in 2022), Dentsu, 2023. https://www.dentsu.co.jp/knowledge/ad_cost/2022/ 09-02-25
[29] 2023 nen nihon no kōkokuhi (2023 年 日本の広告費 ,Japan's advertising expenditures in 2023), Dentsu. 2024. https://www.dentsu.co.jp/knowledge/ad_cost/2023/media2.html 09-02-25

who are the most concerned with the environmental cause. In the case of manga, through time it has proved to be a medium to promote consumption, and the object of consumption in itself.

The manga industry cannot be considered a niche market anymore; On the contrary, it is deeply integrated into Japan's publishing landscape, as most major publishers now operate dedicated divisions. Naturally, the largest market share is held by the top four publishing houses in the country: Kodansha, Shogakukan, Shueisha and Kadokawa. Manga has long since evolved into a mass medium comparable by scale to television or film, and is often the starting point for adaptations, merchandise, and other derivative forms of popular culture. Although the quality of such adaptations varies widely, ranging from 'work of art' to 'mediocre', manga is by all means considered a cornerstone of Japanese entertainment and cultural expression.[30]

2.2. Focus on Manga.

How has manga influenced the Japanese comic book market since the beginning of the decade? How has the industry adapted to the changes brought about by the pandemic, and what key challenges have shaped the publishing industry into its current form? These and many more questions have arisen during the research conducted for this paper, and this segment wishes to shed light on the topics of manga's relevance within the industry and its ongoing challenges.

Having presented an introduction to the mechanisms and inner workings of the Japanese publishing industry, this following section will move on to explore how manga's appeal has fluctuated since the beginning of the decade, especially in response to the Covid-19 pandemic, and how the Japanese market was influenced by overseas and online distribution of manga. More specifically, this section will discuss the parallel development of the entertainment industries in Japan, then present recent market trends for manga along with an explanation of the social relevance of some popular titles, and finally point out the industry's issue with the decline of bookstores, and conduct an extensive analysis of the impact of manga piracy.

2.2.1. Parallel development through intermediality.

Today, manga influences comics publishing markets all around the world, to such an extent that various entertainment industries depend on it to develop new content. This transformation is not confined to a single country, on the contrary, it is a simultaneous process that occurs in different locations and across different industries. So far, this thesis has primarily focused on how manga has

[30] PROUGH, "Marketing Japan…", cit., p. 56

influenced Italy and the rest of Europe; however, it is equally important to discuss the changes that have taken place in Japan, manga's birthplace, during the same period.

With globalisation, consumers can access items globally without necessarily being physically present in the part of the world where an item was created. This applies to any item that has become a global trading export, including manga. In many ways, manga is read for pleasure and entertainment purposes, but in a very saturated market, the criteria for discretion among different products is quality. Each title available today in Japan and other parts of the world (through translation) undergoes a tight process of scrutiny by the readers. In today's globalized market, manga can now be produced in different locations; however, in this global competition, manga from Taiwanese, Chinese, or Korean authors do not automatically receive from Japanese manga fans the same grade of acceptance, purely because of their difference in geographical origin.[31] Then, why are global audiences more interested in Japanese manga than manga from other countries? While of course there isn't a definitive answer to this question, possible explanations may be Japan's intense soft power, manga's historical background, or even underlying biases. As the cultural aspects of manga's popularity will be explored in Chapter 3, the focus of this section will be on the effects of globalization that pertain to Japan's domestic market.

What makes manga so appealing? Countless researchers and fans from different decades have praised the ability of Japanese popular culture products to embrace all dimensions of reality without shunning away from the uncomfortable aspects of it or abide by political correctness. Famous manga series present the same characteristics: strong idealism and stoicism, while maintaining a certain degree of innocence and sentimentalism; closeness to ordinary everyday life, while narrating stories of extraordinary worlds; and overall, a focus on human relationships, harmony, and cooperation among different groups of people, to achieve spiritual and physical growth.[32] Some say manga's popularity is linked to specific elements that aren't as common in Euro-American pop culture, for example, the honest portrayals of human nature, optimism and pessimism, and the perspectives of children. Italian and global consumers appreciate manga for enriching their cultural knowledge and offering them a wide range of new perspectives to enjoy, and possibly be influenced by.[33]

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[31] SUNAOSHI Yukako, "Who reads comics? Manga readership among first-generation Asian immigrants in New Zealand", in Matthew Allen, Sakamoto Rumi (edited by), Popular culture, globalization and Japan, New York, Oxford, Routledge, 2006, p.104

[32] TSUTSUI, *Japanese Popular Culture and Globalization…, cit.* pp.36-37

[33] Ibid.

Who are the actors in charge of shaping the industry? Apart from publishing agencies, editors, and *mangaka* (manga artists), an indispensable clog in the machine are readers themselves.

Mangaka have historically not been seen in a positive light by Japanese society, although this sentiment has undergone some change in recent times. Making manga for a living is considered a rather overrepresented profession, since the industry allows thousands of authors to publish and have a chance at becoming a cartoonist. Unsuccessful attempts bring aspiring authors to either try their luck with different publishers, or focus on other endeavours. The ones in charge of deciding an author's future, unlike in many other countries, are readers. It is common knowledge that manga in Japan is primarily published in 'container' magazines (雑誌, *zasshi*); once the magazine goes on sale, the publishers gather the readers' impressions on the ongoing series by collecting the readers' questionnaires that come with each copy, and the fans mail directly to publishing companies. Based on the readers' opinions, publishers create a weekly ranking for ongoing series that roughly determines which works should continue serialization and which should be cancelled. Therefore, a magazine's offer is not solely decided by the editors in charge, but also by the customers who judge each story's appeal every week. The fame of a series is a rather unpredictable factor: for this reason, artists are paid per manga page and scriptwriters per chapter, while contracts do not include a minimum number of releases or publishers' obligations to the authors. Once a manga series has proved its marketability and a substantial number of chapters have been published, these will be collected in volume format (called *tankōbon*[34], and quite similar to their Italian counterparts) and released on the market to possibly become part of a franchise.[35]

In the next segment, which analyses recent market trends for manga, it will appear that intermediality is essential within the manga industry. According to Eric Méchoulan, intermediality is the process of making new environments appear.[36] Through this process, a piece of media (such as a manga, film, or novel) does not function solely based on its relationship to other works, but becomes part of a much larger discourse, and its legitimacy is provided by the institutions that endorse it (in this case, those would be the publishers) and the medium which distributes it (that is, print or digital formats). Not only does it create a self-contained yet extensive space for a work's alternate reality, but it also prolongs the lifespan of the original media that acts as a source for adaptations, which in the majority of cases is manga. Each new media instance, anime, live-action,

[34] "Tankōbon" (単行本) indicates a standalone book which usually collects a handful of chapters of a previously published manga series. Source: Oxford Languages.
[35] BERTUCCI, Il mercato del fumetto…, cit., pp.34-35
[36] Eric MÉCHOULAN, *Intermediality: An Introduction to the Arts of Transmission*, "SubStance Vol. 44, No. 3, ISSUE 138: Intermedialities", Baltimore, The Johns Hopkins University Press, 2015, p. 4

novel, video game, toy, merchandise and so on, adds to the space of the original work and increases fans' engagement with the media. When approaching the serialization of a manga series, it isn't usual for manga authors and editors to plan and strategize the release of a variety of media adaptations, with the objective of creating a franchise. Once manga, as the "original work" (*gensaku*) is adapted into other media formats, or "related goods" (*kanren shōhin*), becomes part of a broader system of products which cannot be localised.[37] Media mix operates an erasure of origins, blurring not only the perception of a franchise's starting point, but also the temporal and cultural contexts in which it generated. In the Japanese media industry, media mix relies significantly on the transition from manga and other print media to television and other electronic entertainment forms. Television has, in fact, been one of the main reasons for manga's current popularity in Italy and the rest of Europe, because its distribution method entails reaching different demographic groups and its advertisement revenues have historically been greater than those of print media. For this and other reasons, manga publishers in Japan have relied on the anime entertainment industry to retroactively increase the profits of their products. Even media mix models that are generated from video games or toys for children eventually turn to television animation to boost the reach of their products, even in late-night broadcasting timeslots.[38] However, although television animation is the form of entertainment that generates the highest revenues among media industries, and plays an integral role in intemediality, the manga industry remains the main source of entertainment from which most other media mixes originate.

It is possible to say that due to globalisation manga consumption will likely never return to the binary flow where consumption mostly occurred within Japan's national borders, and only later in the rest of the world by manga importation from Japan.[39] Global demand has made adaptation necessary and urgent, influencing both the foreign and domestic markets for manga.

2.2.2. Market analysis and sales trends in recent years.

The Japanese comics industry is s among the largest in the world, and its cultural exports also affect foreign publishing. Despite its scale, market over-saturation has severely impacted magazine sales, which have been declining in the last two decades in favour of *tankōbon* releases, a similar situation to that registered in Italy and France.[40] Additionally, in 2017, sales of digital comics in Japan

[37] Marc STEINBERG, *Anime's Media Mix: Franchising toys and characters in Japan*, London, University of Minnesota Press, 2012, p. 160
[38] Thomas LAMARRE, *The anime ecology: a genealogy of television, animation, and game media*, Minneapolis, University of Minnesota Press, 2018. p.181
[39] SUNAOSHI, "Who reads comics?…", cit., p. 105
[40] BERTUCCI, *Il mercato del fumetto…*, cit., p.36

surpassed for the first time those of comics in printed format, a phenomenon that has only increased during the "Covid-19" pandemic.[41] Let us now discuss the changes that have occurred in the market and how the new generation of comics, which has replaced those of the previous decade, is fuelling the industry's evolution.

The period between 2009 and 2015 saw a generalised decline in the manga market, especially in overseas markets. As explained in the previous chapter, the first instances of a manga boom overseas occurred around the beginning of the century, when foreign publishers, following the success of some anime series, decided to release primitive manga adaptations. In the U.S, after some popular anime series started to air on Cartoon Network, for example, *Naruto* in 2005 and *Bleach* in 2007, manga sales in bookstores and specialised comics bookshops soared, going from 60 million dollars in 2002 to 210 million in 2007. However, shortly after this flourishing period, things started to change: as many manga publishers went out of business or stopped selling manga, the number of volumes published in North America per year dropped from 1,500 in 2007 to 695 in 2011.[42] Despite the substantial decrease, many publishers accepted the change with optimism, as it allowed them to be more selective with the titles they released, whereas previously, at the height of the early 2000s manga bubble, the public's demand was so high that supply could not be sustained.[43] If we consider the theory for which publishing markets follow a cyclical trend lasting approximately ten years, as discussed at the end of the previous chapter, we can hypothesize that the manga boom of manga that has been observed since 2020 and partly driven by the effects of the pandemic, is destined to decline toward the end of this decade. This fluctuation in global interest has already started to be registered in Japan, and has reflected in recent years' manga sales charts.

In Japan, magazines have historically been the cornerstone of manga publishing. Every mangaka dreams of seeing their work be serialised in an anthology magazine, as it marks the first step towards volume (*tankōbon*) releases. Although there have been several changes in the publishing industry, brought upon by the advent of digital manga which has significantly impacted magazine sales, *manga zasshi* (漫画雑誌) remain a pillar of the industry. The most widely read comic book magazine in Japan, Shueisha's *Weekly Shōnen Jump* (週刊少年ジャンプ), started publication in

[41] ANDO Kenji, "Manga tankōbon no ureyuki, kako saidai no ochikomi. Riyū wa, denshi-ban dakede wa nakatta." (Sales of manga books have fallen to their biggest ever low, and the reason for this is not just digital editions), The Huffington Post, 26 February 2018. https://www.huffingtonpost.jp/entry/comic-paper_jp_5c5a9cbee4b0de0c47e4859a , 27-10-2024

[42] Brigid ALVERSON, *Manga 2013: A Smaller, More Sustainable Market*, in "Publishers Weekly", 5 April 2013, https://www.publishersweekly.com/pw/by-topic/industry-news/comics/article/56693-manga-2013-a-smaller-more-sustainable-market.html 18-01-25

[43] Ibid.

1968, and is one of the longest-running manga magazines, currently celebrating its 57th anniversary. It experienced a golden age in the 1990s, coinciding with what the North American and, in part, European comic markets were going through. *Weekly Shōnen Jump* releases new chapters for about eighteen series every week on Monday, each chapter between 17 and 25 pages long. It is undoubtedly a substantial publication that is considered a symbol of Japanese manga culture in its home country and abroad. Other notorious manga magazines are Kodansha's *Weekly Shōnen Magazine* (週刊少年マガジン) and Shogakukan's *Weekly Shōnen Sunday* (週刊少年サンデー) in the *shōnen* category, Shogakukan's *Ciao* (ちゃお) and Shueisha's *Ribon* (りぼん) in the *shōjo* category, Shueisha's *Weekly Young Jump* (週刊ヤングジャンプ) for young adults and Shogakukan's *CoroCoro Comic* (コロコロコミック) for children. In Japan, *One Piece* is the best-selling comic book series of all time, selling over 500 million volumes worldwide. It's published on *Weekly Shōnen Jump* and currently sells an average of about one million copies per *tankōbon*, amounting to five million copies if sales outside of Japan are added to the equation. In Italy, the sales record is around one million copies and belongs to a Disney publication. The same can be said for Zerocalcare, the most prominent comic artist in Italy in the current market, who has well exceeded one million books sold, but only if we take into account sales of all his works put together. The goal of one million copies seems to be indicative of great success almost everywhere in Europe: in France, every time a new adventure of *Asterix and Obelix* comes out, it becomes the best-selling book of the year, with an average of one and a half million copies sold. The record for the best-selling comic book of all time worldwide, certified by the Guinness Book of Records, belongs to Marvel's *X-Men* No. 1.[44]

Hereafter will be presented a list of the best-selling manga series in Japan between 2019 and 2024, and will be discussed the relevance of some titles in changing the industry's scale and global reach.

2019:

Rank	Series Title	Author(s)	Estimated Sales
1	*Demon Slayer: Kimetsu no Yaiba*	Gotōge Koyoharu	12,057,628
2	*ONE PIECE*	Oda Eiichirō	10,134,232
3	*Kingdom*	Yasuhisa Hara	7,661,361
4	*The Promised Neverland*	Shirai Kaiu , Demizu Posuka	7,454,745

[44] Andrea FIAMMA, *L'albo a fumetti più venduto di sempre*, in "Fumettologica", 12 September 2023. https://fumettologica.it/2023/09/x-men-1-marvel-comics-jim-lee-piu-venduto/ 09-10-2024

5	*The Quintessential Quintuplets*	Haruba Negi	5,895,000
6	*My Hero Academia*	Horikoshi Kōhei	5,047,574
7	*Attack on Titan*	Isayama Hajime	4,704,234
8	*Haikyū!!*	Furudate Haruichi	4,514,838
9	*Kaguya-sama: Love is War*	Akasaka Aka	4,096,492
10	*That Time I Got Reincarnated as a Slime (manga)*	Fuse, Kawakami Taiki, Mitz Vah	3,414,482

Fig. 2.2: Top-Selling Manga in Japan during 2019, Ranked by Series.
Source: Oricon via Anime News Network

Sales data presented above was collected by Oricon between November 19 2018, and November 17 2019.[45]

This decade had been marked since its beginning from the rise of a new generation of titles whose popularity boosted manga sales worldwide, such as *Demon Slayer: Kimetsu no Yaiba* (鬼滅の刃) by Koyoharu Gotōge, *Jujutsu Kaisen* (呪術廻戦) by Akutami Gege, or *Chainsaw Man* (チェンソーマン) by Fujimoto Tatsuki, to name a few. As we can see in Fig. 2.2, in first place in 2019's bestselling chart stands *Demon Slayer*. The series began publication on Shueisha's *Weekly Shōnen Jump* on February 15th 2016 and continued until May 18th 2020. For this reason. In 2019 the story had been reaching its turning point, leading up to its climax, which further incentivised sales. Against all expectations, *Demon Slayer* became the best-selling series of the year breaking *One Piece*'s 11-year-long streak at the top of Oricon's chart.[46] Shueisha differs on this, placing for the 12th year in a row *One Piece* at the top of their sales ranking, despite it being calculated on print run. No individual volumes of the *Demon Slayer* series had sold more than those of *One Piece* or *Attack on Titan*, all volumes increased in sales since the release of the anime series produced by Ufotable and broadcasted on Tokyo MX, and the upcoming movie. Although data from the publisher differs at times with other sources, the 2019 chart goes to prove further how intermediality is fundamental to promote individual media industries.

[45] Egan LOO, *Top-Selling Manga in Japan by Series: 2019,* in "Anime News Network", 27th November 2019. https://www.animenewsnetwork.com/news/2019-11-27/top-selling-manga-in-japan-by-series-2019/.153758 04-10-2024.

[46] *ONE PIECE: kotoshi mottomo ureta manga ni aisaretsuzukeru riyū 2 i ha "Kimetsu no Yaiba" igaina kyōtsūten mo …* (ONE PIECE: The reason why it continues to be loved as the best-selling manga of the year. In second place is "Demon (note follow-up) Slayer: Kimetsu no Yaiba." There are also some surprising similarities…), in *"MANTANWEB"*, 25 November 2019. https://mantan-web.jp/article/20191124dog00m200033000c.html 09-12-2024

According to Takano Ken (高野健), editor in chief of *One Piece* at Shueisha, both series show similitudes, for instance the realistic aspects of the characters personality. Apart from the fight scenes and the catchphrases, these characters show aspects of today's society, they are able to connect with fans on a deeper level by their ability to capture the reader's attention.[47] Brilliant worldbuilding and equally clever character designs, along with the authors' genuine care for their fanbase, are what make manga relevant in society, not only for their entertainment role, but also for generating empathy and representation. This is why Oda's *One Piece*, which began serialization back in 1997 and has been recognised in 2015 by Guinness World Records as the most-published comic book by a single author, is still so beloved worldwide today.[48]

2020:

Rank	Series Title	Author(s)	Estimated Sales
1	*Demon Slayer: Kimetsu no Yaiba*	Gotōge Koyoharu	82,345,447
2	*Kingdom*	Yasuhisa Hara	8,251,058
3	*ONE PIECE*	Oda Eiichirō	7,709,667
4	*Haikyū!!*	Furudate Haruichi	7,212,099
5	*Jujutsu Kaisen*	Akutami Gege	6,702,736
6	*The Promised Neverland*	Kaiu Shirai, Posuka Demizu	6,368,445
7	*The Quintessential Quintuplets*	Haruba Negi	6,145,591
8	*My Hero Academia*	Horikoshi Kōhei	6,003,589
9	*Spy × Family*	Endō Tatsuya	4,541,589
10	*Attack on Titan*	Isayama Hajime	4,306,012

Fig. 2.3: Top-Selling Manga in Japan during 2020, Ranked by Series.
Source: Oricon via Anime News Network

Sales data was collected by Oricon presented in Fig. 2.3 between November 18 2019, and November 22 2020.[49]

[47] Ibid.
[48] Ibid.
[49] Egan LOO, *Top-Selling Manga in Japan by Series: 2020*, in "Anime News Network", 29th November 2020. https://www.animenewsnetwork.com/news/2020-11-29/top-selling-manga-in-japan-by-series-2020/.166841 04-10-2024.

In 2020, the manga market started to experience astonishing growth rates. The pandemic affected countless consumers worldwide and changed forever the publishing industry both in Japan and overseas. Noteworthy in the 2020 best-sellers chart is Koyoharu Gotōge's *Demon Slayer*, which undoubtedly dominated the competition by selling a staggering 82,345,447 *tankōbon* copies in Japan alone. Various sources have attributed its success to the release of the first season of the related anime.[50] It had been quite popular in past years, but 2020 marked a sales record so high it was difficult to believe. Interestingly, as mentioned previously *Demon Slayer* had a four-year serialization on Shueisha's *Weekly Shōnen Jump*, from early 2016 to mid-2020. Therefore, it took nearly four years for the manga to become popular, a phenomenon which isn't common in the market, as most series enter the limelight early on and rely solely on the fanbase interest while lingering on the edge of cancellation. However, this wasn't the case for Demon Slayer, which benefitted heavily from the anime. The overseas licensing by Aniplex of America allowed the series to become accessible through various streaming platforms, namely Crunchyroll, Hulu and Netflix.[51] The series quickly became one of the flagships of streaming platforms, and once the pandemic began, many people decided to check it out. In the sales chart presented above, we find Endō Tatsuya's *Spy × Family*, an instant success in Japan since it began serialization. The first print run of volume 6 sold one million copies in December 2020, which surprised many, as it was originally an app-based manga. The family drama series' success proved wrong the outdated belief that only physical manga from renowned magazines could achieve the one million copies milestone, and it went on to win prestigious awards in the following years. *Spy × Family* could have set a precedent for the new generation of manga: until then, manga series had typically started serialization in magazines, and only after moved on to being collected in *tankōbon* digests, to be later adapted into anime and movies. However, the elimination of the intermediate magazine publication stage, transitioning to a more direct digital release to print volume process, could cause magazines to suspend or cease publication altogether.[52] Following the *Spy × Family* case, other popular manga have adopted this route of serialization, such as Matsumoto Naoya's *Kaijū No. 8*.

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[50] Egan LOO, *Top-Selling Manga in Japan by Volume: 2020*, in "Anime News Network", 29th November 2020. https://www.animenewsnetwork.com/news/2020-11-29/top-selling-manga-in-japan-by-volume-2020/.166844 04-10-2024.

[51] Marco ANDREOLETTI, *Capire il motivo del successo di "Demon Slayer" è impossibile, probabilmente*, in "Fumettologica", 16 February 2021. https://fumettologica.it/2021/02/demon-slayer-manga/?_gl=1*1bouxze*_ga*NTA5NjEzODkyLjE3MzMzMzM3MTY.*_ga_EB60QWB86B*MTczMzMzMzcxNS4xLjEuMTczMzMzNDg1NS42MC4wLjA. 03-11-2024

[52] Haruyuki NAKANO, *Dejitaruhatsu 'SPY×FAMILY ' mega hitto no shōgeki - kami no manga zasshi wa doko e* (Digitally released "SPY x FAMILY" is a mega hit - where are paper manga magazines?), in "Nippon.com", 27 October 2024. https://www.nippon.com/ja/japan-topics/b11501/ 09-01-25

Exactly as in the rest of the world, and similar to the Italian market, online content distribution saw profits skyrocket during 2020 in Japan, recording a 31.9% increase in sales since the previous year, earning 342.0 billion yen (2 billion and 704 million euros). According to All Japan Magazine and Book Publisher's and Editor's Association (AJPEA), in 2020 manga sales especially amounted to a record 612.6 billion yen (4 billion and 845 million euros), with a year-on-year increase of 23%.[53] General print revenues in 2020 (including magazines and *tankōbon*) had their first increase since 2014, and reached 270.6 billion yen (2 billion and 142 million euros). More specifically, volume editions recorded a 24.9% increase, for a total revenue of 1 billion and 646 million euros, while the magazine sector recorded 495 million euros, falling by 13%.[54] Overall, many experts in the sector pointed out "Covid-19 fatigue" as one of the possible causes for the astonishing rise in popularity of *isekai* ("parallel world") stories.

2021:

Rank	Series Title	Author(s)	Estimated Sales
1	*Jujutsu Kaisen*	Akutami Gege	30,917,746
2	*Demon Slayer: Kimetsu no Yaiba*	Koyoharu Gotōge	29,511,021
3	*Tokyo Revengers*	Wakui Ken	24,981,486
4	*Attack on Titan*	Isayama Hajime	7,332,398
5	*My Hero Academia*	Horikoshi Kōhei	7,020,361
6	*ONE PIECE*	Oda Eiichirō	7,002,583
7	*Chainsaw Man*	Fujimoto Tatsuki	5,212,578
8	*Spy × Family*	Endo Tatsuya	4,973,402
9	*Kingdom*	Yasuhisa Hara	4,672,612
10	*Haikyū!!*	Furudate Haruichi	4,345,443

Fig. 2.4: Top-Selling Manga in Japan during 2021, Ranked by Series.
Source: Oricon via Anime News Network

[53] HODGKINS, Crystalyn, Manga Market in Japan Hits Record 612.6 Billion Yen in 2020, in "Anime News Network", 26 February 2021, https://www.animenewsnetwork.com/news/2021-02-26/manga-market-in-japan-hits-record-612.6-billion-yen-in-2020/ .169987 , 07-09-2024.

[54] "Il mercato dei manga in Giappone raggiunge cifre da record", *Fumettologica*, 19 March 2021, https://fumettologica.it/2021/03/manga-vendite-2020/ 07-09-2024

Sales data presented in Figure 2.4 was collected between November 23 2020, and November 21 2021 by Oricon.[55]

By 2021, the market had reached a comfortable level of share value. All manga series in the top three positions, passed the 20 million copies sold threshold, which demonstrates a consistent positive and growth trend for the past few years. Koyoharu Gotōge's *Demon Slayer*, the indisputable winner of the previous year's chart, was unexpectedly overtaken by Akutami Gege's *Jujutsu Kaisen* which achieved the top position, while the third place went to a new entry, Wakui Ken's *Tokyo Reverngers* (東京リベンジャーズ), which leveraged the anime adaptation's success. Naturally, fans of all series raised their contrasting opinions and took to online communities and social media platforms to discuss the success of each series. However, the 23rd and final volume of the *Demon Slayer: Kimetsu no Yaiba* manga sold 5,171,440 copies in a single year, marking a new record since Oricon began publishing its ranking chart in April 2008.[56] Furudate Haruichi's *Haikyū!!* (ハイキュー!!) is a longstanding series about volleyball which has registered global success since its initial release back in 2012. Throughout the years, it has always been widely popular both within the domestic market and overseas, and although the story entered its final arc in 2019 and serialization on *Weekly Shōnen Jump* finished in 2020, its relevancy didn't cease upon ending, as proved by its entry in the top ten. *Haikyū!!*'s 45th and final volume was first released in Japan on November 4th, 2020 and reached the international market later in 2021. Another interesting entry in the best-selling chart is Fujimoto Tatsuki's *Chainsaw Man*, which was criticized both in Japan and overseas for its crude imagery and subversive narration. Many deemed it too violent and inappropriate for being published in Shueisha's *Weekly Shōnen Jump*. What is more interesting, however, is the series' ability to reach the seventh position on the 2021 chart, although it was serialised only from December 2018 to December 2020, and went on hiatus for nearly two years. Additionally, the manga didn't have an anime adaptation at the time to rely on for additional sales, so the result is all the more impressive.

[55] Egan LOO, *Top-Selling Manga in Japan by Series: 2021 - Jujutsu Kaisen Edges Out Demon Slayer*, in "Anime News Network", 28th November 2021. https://www.animenewsnetwork.com/news/2021-11-28/top-selling-manga-in-japan-by-series-2021-jujutsu-kaisen-edges-out-demon-slayer/.180075 04-10-2024

[56] Egan LOO, *Top-Selling Manga in Japan by Volume: 2021 - Demon Slayer Finale Sells Record 5.17 Million*, in "Anime News Network", 28th November 2021. https://www.animenewsnetwork.com/news/2021-11-28/top-selling-manga-in-japan-by-volume-2021-demon-slayer-finale-sells-record-5.17-million/.180076 04-10-2024

2022:

Rank	Series Title	Author(s)	Estimated Sales
1	*Jujutsu Kaisen*	Akutami Gege	12,282,260
2	*Tokyo Revengers*	Wakui Ken	11,048,067
3	*Spy × Family*	Endo Tatsuya	10,600,571
4	*ONE PIECE*	Oda Eiichirō	10,364,102
5	*My Hero Academia*	Horikoshi Kōhei	5,353,782
6	*Kingdom*	Yasuhisa Hara	3,832,688
7	*Blue Lock*	Kaneshiro Muneyuki, Nomura Yusuke	3,548,238
8	*Chainsaw Man*	Fujimoto Tatsuki	3,438,930
9	*Do Not Say Mystery*	Tamura Yumi	3,140,861
10	*Kaiju No. 8*	Matsumoto Naoya	3,139,803

Fig. 2.5: Top-Selling Manga in Japan during 2022, Ranked by Series.
Source: Oricon via Anime News Network

Sales data presented above was collected between November 22, 2021, and November 20, 2022 by Oricon.[57]

2022 was a year of great changes. The peak of manga sales reached in 2020 had started to subside, and the market was slowly retuning to pre-pandemic levels. Despite the growth trend was continuing, its rapidity and unpredictability were becoming more manageable for the publishers. It was an unusual year, as all top four series each sold over 10 million copies: Jujutsu Kaisen solidified its position at the top of the sales chart, overtaking at the last moment Tokyo Revengers, which was believed by many would have become the best-selling title of the year. *Jujutsu Kaisen* maintained a comfortable lead thanks to the boost generated by the previous year's anime adaptation and the end-of-year (December 2021) highly anticipated movie "Jujutsu Kaisen 0".[58] Tokyo Revengers, at number two, also registered great profits, as it released a total 6 volumes in only one year, and could capitalize on its anime adaptation from 2021 and the announcement the series was

[57] Egan LOO, *Top-Selling Manga in Japan by Series: 2022 - Jujutsu Kaisen Edges Out Tokyo Revengers*, in "Anime News Network", 1st December 2022.
https://www.animenewsnetwork.com/news/2022-12-01/top-selling-manga-in-japan-by-series-2022-jujutsu-kaisen-edges-out-tokyo-revengers/.192470 04-10-2024.
[58] Ibid.

approaching the end of serialization. As the series had ended the previous year, Demon Slayer didn't make the cut of the top-ten, although coming right after at eleventh place, selling a total of 2,909,013 copies.[59] Chainsaw Man's anime adaptation, aired in October 2022, and the new volume arrived too late into the year for it to register an explosion in sales. However, as publishers announced the end of the hiatus and the upcoming part two of the manga series, the full effects of its continuing serialization and anime will be seen next year. Overall, the 2022 best-selling manga titles chart shows for the first time the decade's generational shift within the manga industry, as out of the ten manga listed, only *One Piece* represented the old guard of *shōnen* manga. The middleman between the older and newest generation of *shōnen* manga is probably Horikoshi Kōhei's *My Hero Academia*, an indisputable global success, which Kishimoto Masashi has personally appointed as the heir to *Naruto*. It was serialized in Shueisha's *Weekly Shōnen Jump* from July 2014 to August 2024: during this time the series received many awards in a survey conducted the previous year among Japanese high school students by the research branch of the app Line, it was ranked second after One Piece as the most read manga.[60] Throughout the years, many fans worldwide have debated on whether My Hero Academia, along with Attack on Titan and Jujutsu Kaisen, could have represented the so-called 'Next Gen' of manga magazines in Japan and whether one of them would have been hailed as the heir to the throne of *shōnen* manga. However, the continuous fluctuations of past years have made predictions on the future of manga quite unreliable.

2023:

Rank	Series Title	Author(s)	Estimated Sales
1	*Blue Lock*	Kaneshiro Muneyuki, Nomura Yusuke	10,527,146
2	*Jujutsu Kaisen*	Akutami Gege	8,541,411
3	*ONE PIECE*	Oda Eiichirō	7,197,532
4	*Oshi no Ko*	Akasaka Aka , Yokoyari Mengo	5,413,091
5	*Chainsaw Man*	Fujimoto Tatsuki	5,348,618
6	*Slam Dunk*	Inoue Takehiko	4,968,484
7	*Spy × Family*	Endo Tatsuya	4,326,425

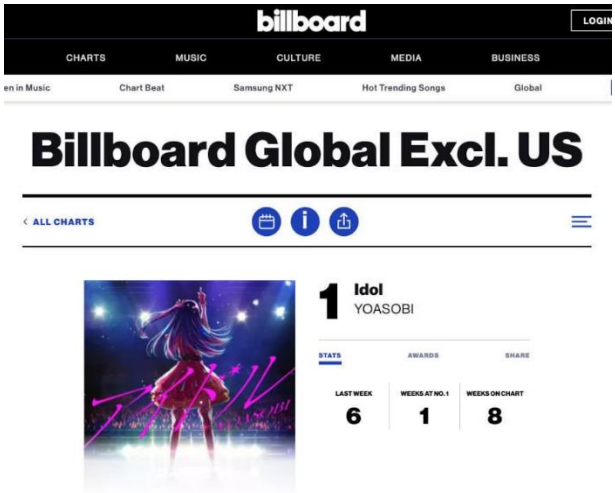
[59] Egan LOO, *Top-Selling Manga in Japan by Volume: 2022 - Jujutsu Kaisen 18 Sells 2.11 Million*, in "Anime News Network", 1st December 2022. https://www.animenewsnetwork.com/news/2022-12-01/top-selling-manga-in-japan-by-volume-2022-jujutsu-kaisen-18-sells-2.11-million/.192471 04-10-2024.

[60] *My Hero Academia – Reception*, in "Wikipedia.org" https://en.wikipedia.org/wiki/My_Hero_Academia#Reception 05-12-24

8	*My Hero Academia*	Horikoshi Kōhei	3,528,423
9	*Tokyo Revengers*	Wakui Ken	3,218,117
10	*Kingdom*	Yasuhisa Hara	3,207,691

Fig. 2.6: Top-Selling Manga in Japan during 2023, Ranked by Series.
Source: Oricon via Anime News Network, Install Base

Sales data presented above was collected between November 21, 2022, and November 19, 2023 by Oricon.[61]



Yoasobi's song "Idol" tops Billboard Global Chart
(© The Asahi Shimbun)

2023's cult case was Akasaka Aka and Yokoyari Mengo's *Oshi no Ko* (押しの子) which started serialization in April 2020 and ended in November 2024, and registered a 393% increase in sales in 2023, when the anime's first season was aired on television and distributed on streaming platforms worldwide. It is an exemplary case of instantaneous media mix success, which touched nearly all other entertainment industries: since its manga release, and the notorious anime adaptation, two spin-off light novels have been published, a live-action announced, and a smartphone video game is set to be released in February 2025. However, the greatest impact of the media franchise has been registered in the music industry. The opening theme song for the first season of the anime, titled "Idol" by duo Yoasobi, reached a total of 100 million worldwide streams on Spotify and video views on YouTube within two weeks of its release. More importantly, Yoasobi's song "Idol" also topped the Billboard Global 200 Excl. U.S. charts with a record of 45.7 million streams and 24,000 virtual copies sold outside the United States of America. As such, "Idol" has become the first Japanese song to top ever the Billboard Global chart as well as achieving the top position in Apple Music's Top 100: Global chart.[62]

It's interesting to see Takehiko Inoue's *Slam Dunk* (スラムダンク) scoring the 6th place in last year's best-selling manga ranking, with a grand total of roughly 4,970,000 volumes sold (marking a 260%

[61] Egan LOO, *Top-Selling Manga in Japan by Series: 2023 (1st Half) - Blue Lock Sells 8 Million After Anime*, in "Anime News Network", 30th May 2023. https://www.animenewsnetwork.com/news/2023-05-30/top-selling-manga-in-japan-by-series-2023-blue-lock-sells-8-million-after-anime/.198621 04-10-2024

[62] ISHIKAWA Shiki, *Producers tell how they grew Yoasobi's fame throughout Asia*, in "The Asahi Shimbun", 10 October 2024, https://www.asahi.com/ajw/articles/15412059, 12-12-25

sales increase), although serialization had ended in 1996. The series originally reached Italy's market at the end of the Nineties, when it was first translated and adapted by Panini Comics, then reprinted by D/Visual between 2010 and 2012. It's fair to say that *Slam Dunk*'s sales boost is likely due to the release of a new movie adaptation, *The First Slam Dunk,* which was produced by Toei Animation and directed by Inoue himself. After its Japanese theatrical release on December 3rd 2022, the film became the fifth highest-grossing anime film of all time ($279 million worldwide), and won the Japan Academy Prize for Animation of the Year in 2023.[63] This goes to prove that the manga can influence not only the publishing industry, but other entertainment industries too. The movie industry is undoubtedly intertwined with the publishing industry, so much so that a new movie based on a beloved manga series (that had ended serialization 26 years prior) managed to generate such impressive amounts of interest both from older and newer fans, that resulted in shockingly high profits in both entertainment branches. But what was the reason for picking up a manga series from the almost thirty years prior and deciding on making a new movie? Once again, the demand of a famous manga's fans moved the industry to action. The original anime adaptation, which aired from 1993 to 1996, did not include the final inter-scholar match, which narrates the epilogue of the story in the manga. Hence, fans had been waiting for a proper conclusion to the story in animation for quite a long time, and when the movie was announced, sales skyrocketed. Slam Dunk is certainly one of the most cherished *spokon*[64] manga, a genre that attracts a vast number of consumers, as proved by *Blue Lock*'s (ブルーロック) No. 1 position in 2023's best-sellers chart. Additionally, booms in sales usually reflect on overseas markets too; in Italy, Panini Comics began reprinting the entirety of *Slam Dunk* in 2020.

On the matter of the relevance of sports manga titles, such as *Haikyū, Blue Lock,* and the aforementioned *Slam Dunk*, in the Ministry of Foreign Affairs (MOFA) press conference held on April 28, 2006, Former Minister Aso Tarō stated that two of Europe's best-known soccer players, France's Zinedine Zidane and Italy's Francesco Totti, shared the passion for soccer manga, as they had both grew up as huge fans of the series *Captain Tsubasa*. Both players have affirmed in the past that it was by watching *Captain Tsubasa*'s TV anime adaptation, which was originally a manga published on *Weekly Shōnen Jump*, that the love for soccer was instilled in them.[65]

[63] Wikipedia.org, *The First Slam Dunk*.
[64] Spokon (スポ根, *supokon*) is a composite term formed by the words スポーツ *(supōtsu,* sports*)* and 根性 (*konjō,* willpower). In the field of manga, anime, and other medias, it is used to refer to stories which usually have sports as a theme, and athletes as cast members.
[65] ASO Tarō, *A New Look at Cultural Diplomacy: A Call to Japan's Cultural Practitioners*, in "Ministry Of Foreign Affairs (MOFA)", 2006 https://www.mofa.go.jp/announce/fm/aso/speech0604-2.html 17-12-24

2024:

Rank	Series Title	Author(s)	Estimated Sales
1	*Jujutsu Kaisen*	Akutami Gege	7,610,995
2	*One Piece*	Oda Eiichirō	5,250,210
3	*Frieren: Beyond Journey's End*	Yamada Kanehito, Abe Tsukasa	4,988,170
4	*The Apothecary Diaries*	Natsu Hyūga, Itsuki Nanao, Nekokurage	4,723,562
5	*Blue Lock*	Kaneshiro Muneyuki , Nomura Yusuke	3,881,269
6	*Kaiju No. 8*	Matsumoto Naoya	3,398,326
7	*Kingdom*	Yasuhisa Hara	3,234,204
8	*Haikyū!!*	Furudate Haruichi	3,077,085
9	*My Hero Academia*	Horikoshi Kōhei	2,943,985
10	*Spy × Family*	Tatsuya Endo	2,662,408

Fig. 2.7: Top-Selling Manga in Japan during 2024, Ranked by Series.
Source: Oricon via Anime News Network, Install Base

Sales data presented above was collected between November 20, 2023, and November 17, 2024 by Oricon.[66]

By 2024, the panorama of the manga market in Japan had already changed significantly since the beginning of the decade. Although profits have continued to increase, the exponential growth phenomenon that occurred a few years prior had dissipated, and market value stabilized. None of the top-ranking titles had managed to exceed the 10 million copies sold threshold of previous years. Considering *The Apothecary Diaries* (薬屋のひとりごと, *Kusuriya no Hitorigoto*) it has been another case of media mix success. However, the original material was a homonymous light novel, which got adapted into the manga format, and only later became an anime adaptation available through international streaming platforms.[67]

Nevertheless, the 2024 ranking signals that change is imminent within the manga industry. In 2024 alone, many of the series which had substantially fuelled manga magazine sales in previous years

[66] Ahmad SUZAIL, *10 Best Selling Manga Of 2024*, in "Screen Rant", 22 December 2024, https://gamerant.com/best-selling-manga-of-2024/ 03-01-25
[67] *The Apothecary Diaries*, in "Wikipedia.org", https://en.wikipedia.org/wiki/The_Apothecary_Diaries 03-01-2025

ended serialization: that was the case for *My Hero Academia* (concluded on August 5th), *Jujutsu Kaisen* (on September 30th), *Oshi no Ko* (mid-November), and many other series. The problem is that no currently ongoing series in main manga magazines have achieved high enough levels of popularity to replace them. Additionally, in the case of *Jujutsu Kaisen* and *Oshi no Ko*, which were the greatest losses for manga fans last year, in both instances the stories seemed interrupted, rather than finished. Although the author of the *Oshi no Ko* manga, Aka Akasaka, had warned fans a month in advance that the ending would have been controversial, many readers were still disappointed by the final chapters of the story, complaining about the poorly written character development and overall rushed pace of the narration. The same thing happened with *Jujutsu Kaisen*: although the conclusion of serialization had been ventilated for a long time, a surprise announcement in August by the publishers confirmed that the series would have ended in five chapter, despite the story being seemingly far from completion. The author Akutami himself later on revealed his sentiment of having mistreated the story by rushing it to its premature conclusion, as many plot points were left without resolution. Even the famous series *Demon Slayer*, which had accounted for record manga sales, ended serialization after only four years, and at the absolute height of its popularity.

There are a variety of factors that have contributed to the current state of manga publishing in Japan. For example, fans have long criticized some of the choices of popular manga magazines, especially Shueisha's *Weekly Shōnen Jump*, for their rigid cancellation practices. The magazine is infamous for being too eager to cancel a manga if it doesn't prove successful early on, which has made it almost impossible for new series to take off in the magazine.[68] Unfortunately, many within the community of fans agree that none of the new manga series currently being serialized seem like they could become flagship series at the moment. This will probably have further implications on the manga publishing industry in the future, which are, however, impossible to predict given the constant evolution of the market and public interest. At the same time, magazine sales continued to decrease, marking an -8,2% year-on-year, while e-readers profits have reached 4.830 billion yen, a 7,8% increase compared to the previous year.[69]

As mentioned in Chapter 1, manga have become increasingly relevant in the world as cultural objects. As one of the main exports of Japan, along with anime, music, TV dramas, fashion, cuisine

[68] Joshua FOX, No Heir Apparent - My Hero Academia, Jujutsu Kaisen, & One Piece's Endings Spell Trouble for Shonen Jump, in "Screen Rant", 10 March 2024, https://screenrant.com/mha-jujutsu-kaisen-one-piece-ending-trouble-shonen-jump/ 28-12-24

[69] *Il mercato dei manga in Giappone raggiunge cifre da record*, in "Fumettologica", 11 April 2024, https://fumettologica.it/2024/04/manga-vendite-2023/#:~:text=Nel%20corso%20dell'anno%2C%20l,annuale%20del%20mercato%20del%20manga 07-09-2024

and so on, they are avidly consumed not only in the rest of Asia but also in the rest of the world, including Italy. Europe's interest in Japanese media is likely borne of a current in globalization and entertainment capitalism. If in the past this cultural power could have been attributed to the United States, and, in the case of comic books, to Walt Disney's productions, today Japanese comics have become the main transnational economic and cultural force, and part of a larger flow of popular culture where no one upholds a hegemony.[70]

2.2.3. The current state of bookshops.

According to Asia News Network, Japanese bookshops are facing many struggles to stay in business, as fewer people read books in their printed form. [71]At the beginning of October 2024, the Ministry of Economy, Trade and Industry (METI) held a press conference in which the task force in charge of "reviving bookshops" outlined the major challenges it's encountering. According to the team, younger generations could grow up without knowing what a bookshop is, which would gravely impact Japan's competitiveness and undermine its foundations.

Back in March of 2024, former Minister of Economy, Trade and Industry Saitō Ken (齋藤 健) launched a cross-departmental project team to promote local bookstores, titled the "Bookstore Revitalization Project" (書店振興プロジェクト). The reason for such a decision was as follows:

> "Local bookstores are well-known in communities because people can experience and enjoy diverse contents there. We consider that they are important as culture-creating bases where creativity can be nurtured."

However, the former Minister continues:

> "The number of such local bookstores has been decreasing rapidly in recent years. At present, nearly a quarter of the local communities in Japan lack a bookstore."[72]

Therefore, driven by the pressing urgency that the situation regarding bookstores demands, the newly launched project aims to discover innovative ways to support local and mid-sized businesses. The minister highlighted that tangible content, a vital cultural resource, has been disappearing from

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[70] Mark W. MACWILLIAMS, "Introduction", in Mark W. MacWilliams (edited by), Japanese Visual Culture: Explorations in the world of manga and anime, New York, London, M. E. Sharpe, 2008, p 15

[71] Walter SIM, *Existential alarm: New government report outlines challenges faced by Japan bookshops,* in "Asia News Network, 21 October 2024, https://asianews.network/existential-alarm-new-government-report-outlines-challenges-faced-by-japan-bookshops/ 03-12-24

[72] *Press Conference by Minister Saito (Excerpt)* - (齋藤経済産業大臣の閣議後記者会見の概要), in "Ministry of Economy, Trade and Industry (METI)", 5 March 2024, https://www.meti.go.jp/english/speeches/press_conferences/2024/0305001.html 05-01-25

the Japanese landscape in recent years. This decline comes at the detriment of the cultural literacy of the citizens. Moreover, the issue is not unique to Japan, as similar trends have been registered in other countries as well, namely France and South Korea. Given the global nature of the challenge, immediate action is imperative. From March onwards, the team held discussions with bookstore owners to exchange ideas, analyse successful examples of attracting more customers through innovative approaches in order to share such cases with bookstores nationwide and aid in their decline.[73] Six months later, Current Minister of Economy, Trade and Industry Mutō Yōji (武藤 容治), in the METI press conference held on October 4th 2024, commented on the work of the task force in charge of the "Bookstore Revitalization Project" reporting some of the results. Muto said he shares former Minister Saito's view on the importance of the matter at hand, and will continue to develop measures to promote local bookstores. Additionally, he said the Ministry would plan to establish a liaison meeting with related agents to move forward under inter-ministerial cooperation, so further developments are expected.[74]

Sales of paper publications, considering the net total of books and magazines, in 2020 decreased by 1.3% from the previous year. Although book sales have remained relatively stable since the beginning of the century, magazine sales have declined by half compared to the figures recorded at the start of the 2010s. General data from the Research Institute for Publications (出版科学研究所) in 2021 show a significant 20.3% year-on-year increase in E-comic book sales, establishing the Comic market as the fastest-growing segment of the publishing industry (earning 612.6 billion yen in 2020, 675.9 billion yen in 2021).[75]

While the sales of new publications in 2021 continued the downward trend observed since 2015, this phenomenon was offset by an increase in the number of new titles released. However, the number of new publications has been gradually decreasing, driven by the urgent need to improve the distribution system's efficiency and to reduce return rates. With support from government institutions and efforts by private publishing companies, in the past few years progress has been

[73] *Keisanshō chiiki no shoten shinkō ni purojekutochīmu tachi age* (経産省 地域の書店振興にプロジェクトチーム立ち上げへ, METI launches project team to promote local bookstores), in "NHK News", 3 March 2024, https://www3.nhk.or.jp/news/html/20240305/k10014379621000.html 27-12-24

[74] Mutō keizai sangyō daijin no kakugi kōki-sha kaiken no gaiyō (武藤経済産業大臣の閣議後記者会見の概要, Summary of the press conference held by Minister of Economy, Trade and Industry Muto after the Cabinet meeting), in "Ministry of Economy, Trade and Industry (METI)", 4th October 2024. https://www.meti.go.jp/speeches/kaiken/2024/20241004001.html 27-12-24

[75] *Shuppan geppō 2023-nen 1 tsuki-gō,* (出版月報 2023 年 1 月号, Publishing Monthly Report January 2023), in "National Publishers Association (APJEA)", https://shuppankagaku.shop-pro.jp/?pid=172613165 17-12-24

made to combat the decline of the number of bookstores and the issues with literacy rates across the country, but much work remains to be done.

2.2.4. The issue of piracy.

Whenever end-of-year best-selling charts are revealed, various discussions regarding the year's most-sold comic book and the most-read comic book inevitably arise. It's important to note, however, that the two rarely coincide. Why is that? Comic book piracy is a practice that has been afflicting the market for decades and represents one of the global challenges that have shaped the publishing industry into its current form.

In 2020, after the implementation of the safety measures for the Covid-19 pandemic and the subsequent global lockdown, Japan saw a surge in visits to pirated content websites. From here on, the focus of this thesis will be to briefly introduce the current status of content piracy in Japan and its global effects, a case of war against copyright violations in Japan which changed the industry's trajectory, and the social implications of the access to pirated content.

Younger generations have grown up in an era of seemingly unstoppable technological progress, becoming accustomed to having the entire world at their fingertips. The internet holds few secrets for them, and whichever information they seek, they will eventually find a way to gain access to. This often includes content protected by copyright laws.

When examining the global scale of the impact of Japanese media, it is necessary to address the piracy of manga and anime, their unauthorized distribution abroad through illegal channels, and the resulting harm caused not only to publishers and booksellers, but also to the authors themselves. Comic books and related forms of content are typically marketized to younger audiences, for whom piracy may be the only option through which they could access them. Only a fraction of Japanese publications are officially translated and adapted for European and American audiences, and even when they are, the process is naturally many times slower than a simulcast release.

To address the impatience of fellow fans, around the beginning of the new century, a new underground figure emerged: the "scanlator" (scans translator). These passionate manga enthusiasts gain access to scans of manga pages of varying quality, translate them (usually into English), edit, and release them on illegal platforms for overseas consumption.

"Scanlating" a single manga chapter can take up to 30 hours of meticulous effort. However, for many fans, this investment of time seems worthwhile, compared to waiting months for that same chapter to be available in print format; a wait that may ultimately be futile if publishers chose not to invest in certain series.

Scanlators produce their own translations in part to compensate for what are, in their opinion, the flawed translations publishing companies release onto the market. Oftentimes, fans have complained about the inaccuracy of some adaptations, including imprecise translations which disregard the cultural and societal context into which a certain work of fiction was created, all to pander to an audience inexperienced with Japanese culture. Their efforts are born from the fact that they don't appreciate the interpretative decisions of publishers' official translations, and, paradoxically enough, from a desire to do justice to the original work. Especially in the past, localization was viewed primarily as a practical necessity, often overshadowing concerns about cultural fidelity or ethical considerations. For instance, terms like "*ramen*" were occasionally replaced with "*spaghetti*", and Japanese names were altered to more familiar "Western" equivalents, such as "Derek" or "Serena", and so on. Other times, more sensitive themes, involving for example sexuality or illicit drug use, were censored altogether.[76] Additionally, "scanlators" argue that translations of this sort, albeit illegal, can indirectly benefit the industry by expanding the fan base and encouraging readers to purchase licensed copies and related merchandise.

While this practice has been prominent in underground communities since the mid-1990s, its relevance has diminished in recent years. By 2006, "scanlations" had become widespread, as publishers overseas quickly acquired a large number of licensing rights, particularly in the United States. Therefore, the purpose of "scanlation" quickly shifted from the noble quest of "introducing people to obscure manga" to a more greed-driven one, such as "scanlating" to read both licensed and unlicensed manga for free". By 2008 onward, the practice of "scanlation" was already mostly associated with illegally accessing an enormous number of free manga online.[77] Some "scanlators" (whilst continuing their unauthorized activities) now discourage readers from relying on their materials, and advocate for supporting the original creators. Surprisingly, many claim they will remove their publications from online platforms as soon as an official release is announced in their respective countries.

Legislations against copyright infringement have also been getting more stringent.

Naturally, the relationship between Japanese publishing companies and "scanlators" is one of rancour and antagonism, as publishers generally communicate with "scanlation" website administrators through cease-and-desist notices. Authors, in particular, have been deeply affected by the piracy of their work. When an artist invests weeks, months or even years perfecting their skills,

[76] Cecilia D'ANASTASIO, *The Invisible Labor Economy Behind Pirated Japanese Comics*, in "Vice", 9 April 2015, https://www.vice.com/en/article/meet-the-scanlators/ 13-12-24

[77] *Third Generation: The New World*, in "Inside scanlation", https://www.insidescanlation.com/history/history-3-3

all the while navigating (and often surviving) the industry's relentless pace, it is understandable that having their work stolen, without having the chance to defend it, would be disheartening.

Publishers argue that content piracy ultimately fosters an environment where the material (manga, in this case) is perceived as having little to no value, as the illegal distribution of stolen works sets lower standards for the overall quality of comics. Moreover, the rushed release schedules often result in translations that are, at best, amateurish. As Kurt Hassler, the editorial director of the American manga publishing company Yen Press, reveals in an interview with Vice back in 2015:

> "It really isn't a coincidence that manga sales in the US plummeted after aggregator sites started popping up and garnering so much traffic. Prior to that, manga sales had been on a steep incline, frankly unlike anything that was going on in publishing at the time."[78]

Hassler has been battling "scanlators" since the year 2000. According to his insight into the American industry, many manga publishers in the United States had to cut contracts with Japanese publishing companies, which resulted in a loss of international revenue on both parts. The impact had been so severe that it took years for the industry to rebound, but even then, the damage done had already shaped forever the new publishing market.[79] To address this issue, the publishing industry has been implementing new and more elaborated regulations. In July 2013 the Manga-Anime Anti-Piracy Committee was formed to protect manga and anime from widespread copyright infringement in Japan as well as in the rest of the world, through cross-industry efforts in response to a proposal by the Japanese Ministry of Economy, Trade and Industry (METI), working with the Content Overseas Distribution Association (CODA).[80]

The committee was founded by 15 major manga publishers and anime production companies listed hereafter (in alphabetical order):

Aniplex Inc.
BANDAI NAMCO Games, Inc.
Bushiroad, Inc.
GOOD SMILE COMPANY, Inc.
KADOKAWA CORPORATION
Kodansha, Ltd.
Pierrot Co., Ltd.
SHUEISHA, Inc.
Shogakukan, Inc.
Shogakukan - Shueisha Productions Co., Ltd.
STUDIO GHIBLI, Inc.
Sunrise, Inc.

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[78] D'ANASTASIO, *The Invisible Labor…*, cit.
[79] Ibid.
[80] CODA, https://coda-cj.jp/

Tezuka Productions Co., Ltd.
TMS ENTERTAINMENT Co., Ltd.
TOEI ANIMATION Co., Ltd.
(source - CODA)

Then, in 2014, The Manga-Anime Anti-Piracy Committee, launched the Manga-Anime Guardians Project (MAGP). Its purpose was to take down illegally uploaded copies from online platforms, then to create a scheme to guide fans from illegal sources to legitimate sites, and finally, to launch campaigns promoting awareness of copyright protection.[81] In 2015, picking up the legacy of previous organizations, some of the biggest Japanese publishing companies (Shueisha, Kodansha, Kadokawa, Shogakukan, along with ANIMATE) announced the foundation of a new joint company named Japan Manga Alliance (JMA). Its purpose was to protect the copyrighted works of the founding companies and establish new legal ways for consumers to access them (namely by opening more domestic and foreign points of sale). The newborn alliance also sought to advertise further their products, while building a larger fanbase, and, by researching foreign markets, even attract tourism from abroad.[82] That same year, industry research brought to light alarming results.

In 2015, the Manga-Anime Guardians Project (MAGP) team reported that over 50% of manga and anime consumers in the United States were accessing pirated content. The team estimated the financial damage caused by online piracy to be approximately 20 billion dollars. In Thailand, although many publishers release a vast array of official editions of Japanese manga, the circulation of illegal pirated manga content was nearly double. Thailand's market appeared to be very receptive to manga, grossing nearly 120 million euros in a year.[83] Naturally, the more fans who can effortlessly gain access to pirated material, the greater the harm done to the industry and the creators it relies on. In the worst-case scenario, this financial loss could eventually lead to the cancellation of a series, leaving its creator without any source of income.

The focus of this section will now shift to analyse the case of Mangamura, one of the largest and most popular "scanlation" websites, to explore the implications of current legislation and the revolution of the publishing industry that pirated manga has caused from 2015 to the present.

[81] *The Launch of the Manga-Anime Guardians Project To bring "genuine creations" to Manga-Anime fan*, in "The Content Overseas Distribution Association (CODA)", 30 July 2014, https://coda-cj.jp/news/414/ 13-12-25
[82] PINEDA, Rafael A., "Shueisha, Animate, Kodansha, Kadokawa, Shogakukan Launch Joint Venture to Promote Anime, Manga in Asia", *Anime News Network*, 02 September 2015. https://www.animenewsnetwork.com/news/2015-09-02/shueisha-animate-kodansha-kadokawa-shogakukan-launch-joint-venture-to-promote-anime-manga-in-asia/.92429 09-10-2024
[83] *Gli editori giapponesi di manga si alleano contro la pirateria*, in "Fumettologica", 4 September 2015. https://fumettologica.it/2015/09/editori-giapponesi-alleano-contro-pirateria/ 09-10-2024

Mangamura was an illegal website that provided users with a vast array of pirated manga content. Active between February 2016 and April 2018, the platform attracted an average of 100 million users per month during its operation, making it one of the most popular websites in Japan, which became a societal issue. By the time it shut down, the site had posted around 8,200 titles and generated a financial loss of close to 320 billion yen (close to 2 billion euros).[84] Legal proceedings began in 2017, when Kodansha and other publishers filed a lawsuit against the site's operators for copyright infringement. During its lifetime it's estimated that the site made available for illegal consumption around 73.000 titles. After the first legal measures which shut down the website in 2018, the site operator Romi Hoshino fled Japan and moved to the Philippines. He was then arrested in 2019 after being detained by authorities in Manila.

On July 1st 2020, the ABJ (Authorized Books of Japan) association was established. ABJ is a private organization constituted by major publishing companies, e-book distributors, communications companies, and author rights organizations. The organization was established to ensure safe and legitimate access to digital content, and the protection of such copyrighted material by the issuance of the "ABJ Mark® ".[85]

Authorized Books of Japan mark (© ABJ)

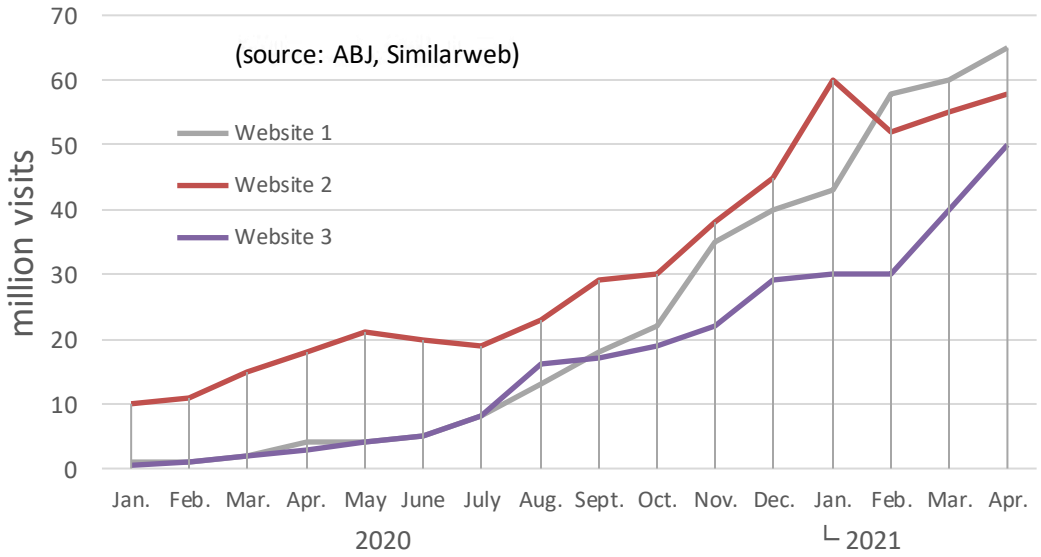
Since its' creation, the mark has served the purpose of indicating whether an e-book distribution service is legitimate or not. Furthermore, its other purposes are to collect and present information on illegal websites in order to accelerate legal procedures, raise awareness through educational activities, and ultimately the creation of a cooperative system between organizations both in Japan and overseas. The ABJ also files trademark applications in 40 other countries, including the United States, Asia, and the European Union. Today, thousands of digital retailers have been issued the mark.

In June 2021, the Fukuoka District Court sentenced Mangamura's former operator Hoshino (who was extradited from the Philippines) to three years in prison and ordered him to pay a fine of 10 million yen and about 62.6 million yen in back taxes, for violating copyright law.[86] However, the situation after Mangamura closed didn't improve as expected. All plaintiffs hoped the lawsuit would

[84] MOROKUMA, Misaki, "Manga no kaizokuban saito, Nihonde wa shōmetsu mo sekaide wa zōka no ichizu, taisaku wa?"(Pirate manga websites have disappeared in Japan but are on the rise around the world. What can be done?), *Mainichi Shinbun*, 30 April 2024.
[85] ABJ とは (translated), https://www.abj.or.jp/about
[86] YONEDA, Yuto, Ex-Mangamura operator ordered to pay 1.7 billion yen to publishers, in "The Asahi Shimbun", 18 April 2024.
https://www.asahi.com/ajw/articles/15233684#:~:text=In%20a%20criminal%20case%2C%20the,bars%20and%20has%20been%20released 05-10-2024.

help deter other manga piracy site operators from uploading content illegally, but in 2019, the number of illegal websites either set up anew or established increased rapidly. These websites were created one after the other using Mangamura's format, which allowed manga viewing on

Figure 2.8: Access to Piracy Websites - between 2020 and early 2021. Source: ABJ, Similarweb.



smartphones. According to Atsushi Ito, ABJ public relations chief and editorial general affairs advisor at leading publisher Shueisha Inc., after its closure, things were even worse than when Mangamura was in its peak.[87]

President Ito commented that this may have been a result of the Covid-19 pandemic stay-at-home lifestyle, which could have incentivized readers to approach illegally released material as a way to combat both the economic depression, and the forced isolation.[88]In the year following its establishment, ABJ concluded that about 750 piracy websites were operating. The most popular amongst these could reach more than 240 million accesses each month. In addition, views of the top three pirate websites surged by about 14 times in between January 2020 and April 2021.

On August 30, 2022, the Agency for Cultural Affairs opened a consultation hotline to collect inquiries about copyright infringement cases online.[89] Since then, Shueisha has submitted up to 120.000 requests a month to websites, server operators and other related parties, demanding the deletion of pirated content, and filed about 10 criminal complaints every year.

[87] YOSHIZAWA, HIDEMASA, TATSUYA, SUDO, *Pirated manga crisis even worse since closure of Mangamura site*, in "The Asahi Shimbun", 17 June 2021. https://www.asahi.com/ajw/articles/14366448 03-09-2024
[88] Ibid.
[89] Agency for Cultural Affairs, Government of Japan (文化庁) 海賊版による著作権侵害の相談窓口を開設, Consultation hotline opened for copyright infringement caused by pirated copies), https://www.bunka.go.jp/koho_hodo_oshirase/hodohappyo/93757001.html 03-09-24

Then, on April 18th 2024, a historical sentence for copyright violations was pronounced. The Tokyo District Court ruled in a lawsuit filed by Kadokawa Corp., Shueisha Inc. and Shogakukan Inc. against Mangamurs's operator, for infringing copyrights by publishing popular manga series on the internet without permission.[90] Hosino was sentenced to pay 1.7 billion yen (approximately 10 million euros) in damages to the plaintiffs, three of the biggest publishing houses in Japan.[91] The sentence most likely marked the highest sum ever granted among other similar cases. Originally the requested payment was 1.9 billion yen, although the court settled on 1.7 billion. What's even worse to consider, is that the damages were calculated by multiplying the average number of views by the sales price of the reclaimed work (estimated to be around 320 billion yen). Naturally, the former operator Hoshino claimed he was only involved in the website's system, and not its administration, therefore his actions weren't imputable at the time of the events.[92]
ABJ and Shueisha Inc. executive Atsushi Ito welcomed the ruling, although he made remarks that eradicating piracy remains difficult.

So, what are the current challenges the Japanese publishing industry has been facing after the pandemic's regulations were lifted? While the firms have won a significant battle and the compensation was close to the full amount demanded, they face a long war against new sites relentlessly emerging overseas. While legal actions have deterred other pirates and nearly eradicated them inside Japan, overseas pirate sites remain out of control.
One issue is domain-hopping, where pirate website operators can change domains every two weeks or a month, to avoid anti-piracy measures in place for specific ones.[93] Then, another serious challenge is closing piracy sites where the operators are based overseas, as it's harder for foreign authorities to act in the interest of Japanese companies. Creative works are being translated into other languages, mainly Vietnamese and English, but the industry must put effort into monitoring

[90] YONEDA, Yuto, *Ex-Mangamura operator ordered to pay 1.7 billion yen to publishers,* in "The Asahi Shimbun", 18 April 2024. (note follow up in next page)
https://www.asahi.com/ajw/articles/15233684#:~:text=In%20a%20criminal%20case%2C%20the,bars%20and%20has%20been%20released 05-10-2024
[91] Redazione, *Sentenza storica contro la pirateria di manga in Giappone*, in "Fumettologica", 4 May 2024. https://fumettologica.it/2024/05/sentenza-storica-manga-pirata-giappone-pirateria/#:~:text=Un%20giudice%20di%20Tokyo%20ha,%3A%20Shogakukan%2C%20Shueisha%20e%20Kadokawa 05-10-2024
[92] KANEKO, Karin, *Manga piracy website operator ordered to pay ¥1.7 billion to publishers*, in "The Japan Times", 18 April 2024. https://www.japantimes.co.jp/news/2024/04/18/japan/crime-legal/manga-mura-copyright-ruling/ 05-10-2024
[93] Ibid.

and taking down other versions as well.[94] As of January 2024, the ABJ had identified 1,176 pirate websites. Among these, nearly 80% were dedicated to posting foreign translations of manga.[95] Blocking search engine results is also a viable countermeasure to piracy being considered. Unfortunately, at present no measure could completely eradicate unauthorized online publications from being outspread; the result of stricter regulations might be counterproductive to the distribution of manga altogether, and drive away consumers who would feel too limited. It's impossible to fully hinder the acquisition of scans by screenshots, and it's equally pointless trying to prevent the scanning of printed publications. For now, the industry is conducting awareness campaigns and has collaborated with Google to hide multiple pirate sites from search results since fall 2022. Going forward, efforts will focus on boosting lawful distribution of manga overseas to mitigate the inevitable damages.

Last year, Japan's biggest publishing houses participated in the Internet Governance Forum (IGF) hosted by the United Nations. The aim was to address the reality of piracy's damage, and therefore to urge cooperation from internet-related businesses to implement countermeasures.[96]

In the future, the "Authorized Books of Japan" organization aims to collaborate with domestic and international institutions dealing with electronic publishing, overseas organizations, and government agencies, to further the anti-piracy agenda.

One of such anti-piracy campaigns started on July 17 2024, which was established as "Manga Day", to commemorate the release of the oldest satirical newspaper in the world, U.K.'s "Punch", back in 1841. In Italy, on July 17th the newspaper La Repubblica hosted a one-page advertisement thanking readers who choose to read official versions of manga series, instead of pirated ones. Similar ads also appeared on the El País in Spain, Le Monde in France, and The New York Times in the United States.[97] On the inserts, various manga characters from popular ongoing and non-series say "Thank you" to their readers.

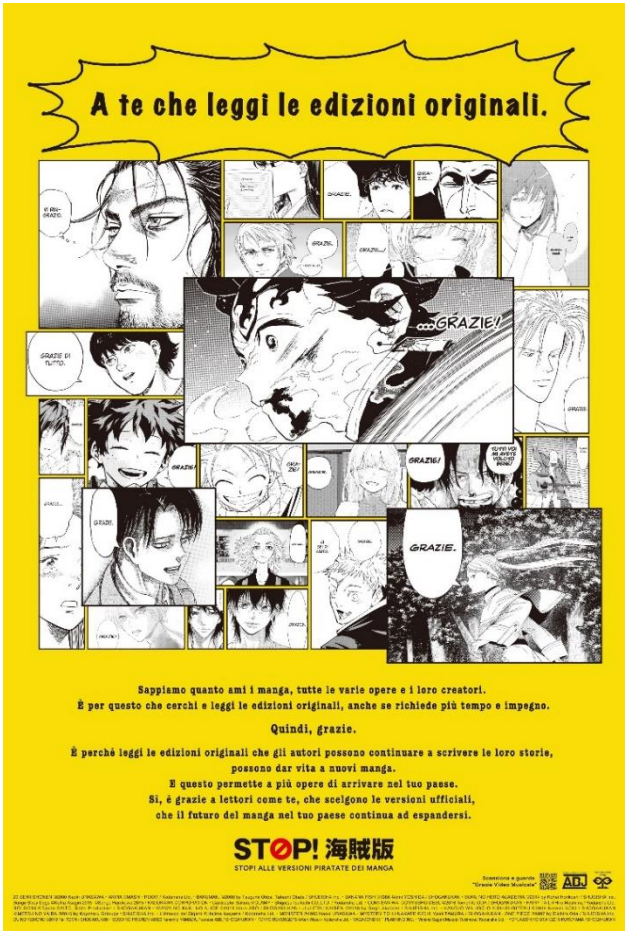
[94] MOROKUMA, Misaki, Manga no *kaizokuban saito, Nihonde wa shōmetsu mo sekaide wa zōka no ichizu taisaku wa?* (Pirate manga websites have disappeared in Japan but are on the rise around the world. What can be done?), in "The Mainichi", 30 April 2024.https://mainichi.jp/articles/20240429/k00/00m/040/018000c 07-10-2024

[95] Ibid.

[96] Ibid.

[97] "La campagna contro la pirateria dei manga sulle pagine di Repubblica, spiegata", *Fumettologica*, 17 July 2024. https://fumettologica.it/2024/07/pirateria-manga-repubblica/ 05-10-2024

According to ABJ, the positive approach of saying "Thank you for reading the official versions" instead of "Stop reading the pirated versions" has already proven effective in Japan. In fact, the campaign sparked discussions about piracy on social media, raising awareness on the issue and thereafter fostering an atmosphere that encourages reading the official versions. Through this initiative, ABJ states, free-access reading was reduced by 25%, lowering the economic damages from 500 billion yen to 380 billion yen.[98] *The number includes works from Korea and China, and was estimated by a single manga volume's price (around 500 yen) times the number of access on a pirate website.



ABJ's international Anti-piracy campaign, in *La Repubblica* (© ABJ)

[98] ABJ, "Lotta alla pirateria mondiale dei manga, che si traduce in perdite per oltre 0,8 miliardi di dollari al mese a causa delle letture gratuite non autorizzate", https://www.abj.or.jp/italian

Chapter 3

Social and Cultural Perspectives of the Influence of Japanese Literature.

3.1. Cultural and Social Impact.

Literature serves multiple purposes, including education, training, entertainment, and perhaps most importantly, identification. Its objectives are diverse and widely acknowledged, yet manga's role in society is unique: it functions as a form of literature with a distinctly artistic purpose. Naturally, society and literature are mutually connected, each shaping and influencing the other in a continuous cycle of coexistence.

Manga has proved to be a significant factor in creating and promoting cross-cultural connections among readers worldwide. Despite its relatively recent recognition within literary circles, it has evolved into a fundamental subject for cultural research. As an artistic and literary medium, manga not only has great value proved by its economic impact, but it also reflects the evolving dynamics of Japanese society. Its cultural significance on an international scale validates its role as a bridge between nations, creating what can be considered a common human experience, all the while incentivizing global dialogue.

As discussed previously in Chapter 1, this paper aimed to quantify the economic influence of Japanese literature, particularly manga, in Italy and other European countries. By examining sales data, market trends, and the history of such media in Italy, this research studies the growing significance of Japanese cultural exports in the European region. Following this, in Chapter 2 the Japanese publishing industry has been analysed in depth, by exploring its internal mechanisms, such as production cycles, distribution networks, and legal frameworks. Additionally, the previous chapter identified the main market challenges, including issues of piracy and digital transformations of recent years. In the concluding Chapter of this research paper, the focus will shift to a broader discussion of the social and cultural impact of the products of the Japanese publishing industry. This

final section explores how manga, among other forms of media, have not only shaped popular culture nowadays, but also influenced societal norms, artistic expression, and cross-cultural dialogue across decades.

More specifically, Chapter 3 will begin by examining the "Cool Japan" policy and its effects on the global perception of Japan and its exports. Following this, the discussion will investigate the representations of Japanese history, society and culture as portrayed in literature, particularly comics. The chapter will then present the findings of the field research conducted for this paper, including the results of a reader's survey distributed among Italian audiences. The study will then shift to analyse consumer behaviour in Japan, to compare it with that of the European public. Finally, this chapter will address the post-pandemic shifts and societal adaptations across entertainment industries, concluding with an exploration of potential future direction for Japanese media.

3.1.1. The "Cool Japan" policy and soft power strategy.

In Japan, manga and other popular media have been hailed as "Japan's new ambassadors" by the press, scholars, and even government officials. This designation could stem from the fact that, for many people outside Japan, such forms of content serve as the first encounter with Japanese culture.

Since the early 2000s, the Japanese government has started to actively capitalize on the global appeal of its mediatic production. The Ministry of Foreign Affairs has long been promoting the idea that contemporary Japanese culture is rooted in a creative tradition with unbroken ties to its past. "Cool Japan" can be defined as a social imaginary which in time has answered the aim of the Japanese government to promote its industries and, in the case of the editorial market, the interests of publishers by capitalizing on its products. As a gateway to Japanese culture, manga is now a prime example of what researchers call "Cool Japan". This concept was designed to modernise the country's cultural image, which, until a few decades ago, was largely limited to traditional icons such as *samurai*, *geisha*, and *ukiyo-e*. Today, manga culture and the *kawaii* aesthetic stand as its central pillars.

It is important to note, however, that Japan's current influence in terms of soft power did not initially stem from a deliberate or systematic self-promotion strategy led by the government. Only in the mid-2000s did the Japanese government recognize the potential of manga culture as a tool for promoting the national image abroad. Beginning in 2007, under the leadership of then Foreign Minister Aso Tarō, the promotion of media which could increase soft power became a central point of Japan's international strategy, marking a fundamental change in its approach to cultural

exportation.[1] In the press conference held on April 28, 2006, Former Minister for Foreign Affairs Aso Tarō acknowledged the competitiveness of Japanese media on a global scale and praised the contributions of the media industries' workers in their role of exporting Japanese culture worldwide. Aso noted that Japan was not the first nation to use comics as a tool to promote a certain ideology, mentioning the example of American cartoons like *Popeye* and *Blondie,* employed in the immediate post-war period by U.S. occupation forces, to portray American sailors as symbols of justice and to idealise suburban household. Aso emphasised that the more a positive representation of Japan is portrayed, the easier it becomes for the government to communicate its values and perspectives in the long term. In addition to more traditional cultural elements, like the tea ceremony, sakura, and sumō, Japan also distributes many newer forms of popular culture with a high degree of appeal, particularly manga. He stated:

> "Japanese manga have come to be widely known around the world. I think we can safely say that any kind of cultural diplomacy that fails to take advantage of pop culture is not really worthy of being called cultural diplomacy."[2]

Pop culture is very effective at influencing the general public, and has been implemented as a valid diplomatic tool since Former Minister Aso's time in parliament. A competitive national brand image helps diplomatic efforts, making it essential to build on the nation's positive reputation and attract interest in both its modern and traditional cultural elements. During his tenure, Former Minister Aso also advocated for the promotion of Japanese television outside of the national borders, and strongly supported media industry professionals, whose creations, he believed, "provide hopes and dreams to young boys and girls around the world".[3]

So, since the mid-2000s, manga has been emerging as a "soft power" medium of modern-day Japan. Its influence on the increasingly culturally cosmopolitan public across the globe has proved manga to be a noteworthy tool to develop cross-cultural interactions among the readers. As cultural products, manga travel the world, transforming Japanese cultural identity (JCI), while exerting an influence on global cultural identity (GCI).[4] Japan notoriously takes pride in the widespread appeal of its cultural and technological products. The government and industries are confident that national

[1] Elisa BERTOLINI, *The Soft Power of Hello Kitty*, in "Bocconi – Opinions", https://www.unibocconi.it/en/news/soft-power-hello-kitty 05-12-2024
[2] ASO Tarō, "A New Look at Cultural Diplomacy: A Call to Japan's Cultural Practitioners", translated from Japanese, MOFA, 2006 https://www.mofa.go.jp/announce/fm/aso/speech0604-2.html
[3] Ibid.
[4] SHAHIWALA, "Paper Bridge To Japan…" cit., p. 103

commodities (manga, anime, hi-tech devices, traditional cuisine and hospitality) will keep improving the country's global standing and soft power.

In modern society culture and consumption have a mutual relationship. Culture is a person's parameter to analyse phenomena and determines how it is understood and assimilated. It constitutes the foundation of society and attributes meaning to objects. Therefore, consumption becomes a selective way of 'adopting' cultural content to produce a hybrid culture, in this case, through literary products, that help a community mould the world around them.[5] Global culture is formed through the interconnection of various local cultures: Japanese people have acquired a sense of cultural identity through comparison with other nations, which globalization enhances. Since identity can be perceived by contrast with its opposite forms, Japan self-promotes its uniqueness by contrast with the rest of the world, and its cultural exports benefit from this perceived diversity.[6]

Researcher Iwabuchi Koichi controversially claims that popular culture media, such as manga, is embraced in Asia and in the rest of the world because of Japan's position as between "East" and "West". For instance, when Japan imports media products from the modern United States and Europe, these media undergo a process of indigenisation and domestication, which makes them more palatable to Singaporean, South Korean or Chinese audiences by increasing their Asian sensibility.[7] Iwabuchi describes Japan's cultural presence as 'odourless'; Its major audiovisual products are destined to be localised in overseas markets, and can be identified with the 3C method: consumer technologies (such as transistor radios, karaoke, or other electronics), comics and cartoons, (manga and anime), and computers (or video games). According to him, Japanese cultural products can be sold internationally only after being 'scrubbed clean' from their association with Japan and presented as entertainment commodities devoid of history, culture, and origin.[8] Through this process, Japan's identity becomes positively associated with the consumption of a particular cultural product, and this constructed national image is then propagated into the world.

More so than a popular culture product, according to philosopher Noël Carroll manga can be considered a form of "mass art". Carroll has defined mass art as products that allow simultaneous engagement between multiple people. To qualify as mass art, a necessary condition is that a work's structure and narrative are designed to achieve maximum accessibility with minimum effort, in

[5] McCRACKEN, "Culture and Consumption…", cit. pp.72-74.
[6] SHAHIWALA, "Paper Bridge To Japan…" cit., p.104
[7] TSUTSUI, *Japanese Popular Culture and Globalization…*, cit., pp.41-42
[8] Koichi IWABUCHI, "Marketing 'Japan': Japanese cultural presence under a global gaze", Japanese Studies, 18, 2, 1998, p.166

order to reach the widest possible audience.[9] Additionally, mass art emerges from urban and industrial contexts and is ultimately bound to capitalistic society. Since manga, along with other Japanese media, aligns with these characteristics, it can be considered a form of mass art.

Marketing manga outside of Japan was, naturally, first directed to the rest of Asia, before it reached markets in the U.S. or Europe. According to Douglas McGray[10], Japan has transitioned from being an economic superpower in the 1980s to becoming a cultural superpower at the start of the century. Over time, the exchange of cultural exports between Japan and the rest of the world, particularly towards the American and European markets, has notably intensified. Exports have historically always fostered a sense of appreciation and curiosity for anything "foreign", ergo, "different". From manga and fashion to animated cartoons, children's video games, and even cuisine, anything concerning Japan has come to be widely perceived as modern, innovative, and distinctly appealing.

Globalization can be understood as the process where a nation's power generates cultural flows, which in response generate demand. By increasing interactions between civilisations, it inflates the perceived contrast between cultures. Since the 1990s, Japan, in particular, has been mastering the art of exporting mass culture to craft a specific global identity, to distribute to the rest of the world. Japan's leading firms undoubtedly secured an intellectual high ground that outpaced competitors, but, according to McGray, its economic rise wasn't driven by ideology, but rather by a specific approach to the global market unprecedented in that era. By the 2000s, a decade-long recession had plummeted the stock market and overall diminished Japan's novelty on the international scene.[11] However, rather than collapsing under economic pressure, Japan's global cultural influence has been growing ever since. Oftentimes, in the past, Japanese people admitted to their little interest in foreign audiences, but welcomed foreign inspiration. This could also signal, according to McGray, a sort of strange point of pride in their ability to reinvent themselves. Traditional and modern cultural products have been amalgamated, focusing exclusively on the aspects that bolster the image of the country. This cultural adaptability, defined by some as postmodernism, may have been brought upon by the recession itself, which disrupted Japan's rigid social hierarchy and empowered the new generation of entrepreneurs. Unlike nations more traditionally wary of the threat posed by globalisation to the erosion of their unique identity, less culturally plastic, Japan embraced it to be more globally invisible.

[9] Noël CARROL, "The Ontology of Mass Art." *The Journal of Aesthetics and Art Criticism*, 55, 2, 1997, p.188
[10] Douglas MCGRAY, "Japan's Gross National Cool", *Foreign Policy*, No. 130, 2002, p.49
[11] Ivi., p.47.

According to McGray, Japan has emerged as one of a handful of perfectly globalized nations. It has succeeded in balancing a flexible and absorptive shared culture with a more private, domestic one. By taking advantage of such balance, a powerful commercial force was built. In McGray's words: "Japan's cultural presence has created a mighty engine of national cool."[12]

The rise of manga since the turn of the millennium has played a great role in growing enrolment rates in Japanese language, history, literature and culture academic courses all over the world. For some, their interest in manga sparked the desire to learn the language, whether to appreciate the original works, or to be able to translate them. For others, manga acted as the gateway to learning about Japan's culture and history. Students inspired by manga often move beyond being interested solely in contemporary Japan and its cultural products, to seek out information about the general context in which they were created.

Manga's growth in sales can be attributed to the decision to preserve its unique cultural qualities when exporting the media to other parts of the world, solidifying its role as a cultural ambassador. Beyond the appealing art style and compelling storytelling, manga's popularity lies in the ability to sell cultural differences, offering readers an alternative to Hollywood and as fuel to the fascination with the "exotic".[13]

3.1.2. Representations of Japanese history and society through manga.

As graphic novels, manga are embedded in Japanese culture, representing its history, folklore, traditions, and societal values. Through its mix of entertainment and education, manga communicates a wide range of information to the readers, often depicting the imperfections and unspoken aspects of society too. Since its conception, manga has served different purposes in Japanese society, such as, but not limited to, moral, aesthetic, didactic and entertainment functions. Manga is steeped in indigenous culture while being combined with modern lifestyle elements to create unique stories.[14] It plays a relevant role in representing Japanese history, from the feudal era to modern times, making historic heritage accessible and engaging for today's audiences. For instance, sports manga have inspired generations of athletes, whereas post-war manga provided a platform to explore themes long considered "politically incorrect", and even humour manga is used as satire to comment on society's issues.[15] As a democratic tool to create art which is accessible to

[12] Ivi. p. 53.
[13] PROUGH, "Marketing Japan…", cit. p. 65
[14] SHAHIWALA, "Paper Bridge To Japan…" cit., p. 105
[15] PELLITTERI, I manga…, cit.

everyone including cultural amateurs, manga also disrupts the ideal borders between high and low culture.

Some of Osamu Tezuka's works move on from superhero stories aimed at younger audiences to address more delicate and thorny issues of contemporary Japanese history. After the war, Tezuka concentrated on the effort of teaching peace and respect for all forms of life through his manga. His stories are known for their humanist themes and narratives that intend to reach all readers, regardless of age and gender.[16] Serialized between 1983 and 1985, Tezuka's "Message to Adolf" (アドルフに告ぐ, *Adorufu ni tsugu*) deals with Nazi atrocities and war events from the Japanese perspective. The narrative condemns and blames for the war atrocities the scourge of racial discrimination, while criticizing the economic manoeuvres and corruption that led Japan toward imperialism. Although Japan was only marginally involved in the Jewish question, the ethnic hatred and violence perpetrated by Japanese soldiers during Manchuria's military occupation from 1932 to 1954 must be remembered as significant historical events. Tezuka also criticized the government's use of nationalist propaganda in an attempt to justify oppression and abuse of power towards other people.[17]

Japan's imposed pacifism drove the country's economic development, which allowed the national efforts to be dedicated to industrial innovation, under U.S. protection. Contemporary Japan was no longer solely an economic global force, but a cultural powerhouse too. Historically, this sentiment has been portrayed through manga, at times also showing more outdated, nationalist and xenophobic views. To not incur cultural obscurantism, it is important to remember the instances where in the past manga has been used as a propaganda medium; going forward, this section will discuss some representations of Japanese history through manga, and the cultural contexts within such works generated.

Since the first Abe administration, the government's goal has been to attribute to Japan a strong national identity through the use of popular media as cultural exports. There have been instances in the past where manga reflected Japan's apprehension about China and South Korea's ascent possibly overtaking cultural dominance in East Asia. At the same time, manga has been employed as a method to represent Japan as a separate geopolitical and cultural entity from the rest of Asia,

[16] ITO Kinko, "Manga in Japanese History", in Mark W. MacWilliams (edited by), Japanese Visual Culture: Explorations in the world of manga and anime, New York, London, M. E. Sharpe, 2008, pp. 33-35.
[17] Marcella ZACCAGNINO, Sebastiano CONTRARI, *Manga: Il Giappone alla conquista del mondo*, in "LimesOnline", 31 October 2007, p. 6. http://limes.espresso.repubblica.it/2007/10/31/manga-il-giappone-alla-conquista-del-mondo/index8c55.html?p=313 , 07-10-2024

leveraging its soft power potential, continuing the Meiji era aspiration to be perceived as more culturally aligned with the idealised "West".[18]

Let us consider the case of two 2005 literary cases: Yamano Sharin's "Hating the Korean wave" (*Kenkanryū,* 嫌韓流), and Akiyama George's "An Introduction to China - Study of Troublesome Neighbors" (*Chūgoku nyūmon yakkaina rinjin no kenkyū*, 中国入門 - やっかいな隣人の研究). These two-volume series of about 300 pages each are filled with Japanese neo-nationalist propaganda and hateful messages toward Chinese and, more importantly, Korean people. Despite the fact both contain deeply insulting stereotypes and xenophobic remarks towards Japan's neighbouring nations, they were published, distributed, and even became successful works. The rise to the status of economic giants of China and South Korea at the turn of the millennium has caused different reactions within the Japanese population. Japan sought greater political influence and international recognition (possibly, by acquiring the position of permanent member of the United Nations' Security Council), and of course, military power.[19] The reality that South Korea had emerged as a rival cultural power in Asia had a resurgence in 2002, when the country hosted soccer's World Cup, and while the world was experiencing the "Korean wave": through television dramas, movies and music, South Korea displaced Japanese popular media exports from the centre of attention. Yamano's controversial "Hating the Korean wave" was originally an online manga strip, but through time it had gained enough traction to e published by Shinyusha, a small company. However, it sold 360,000 copies in Japan, which surprised even the publishers themselves, as they and anybody else in the industry, had severely underestimated the scale of the anti-Korean movement. In the story, Japanese characters are depicted with Caucasian features, while South Korean characters show more Asian features, a decision clearly rooted in Meiji Restoration era imagery. What's more interesting, is that Yamano's work didn't receive the necessary criticism from public officials, intellectuals, or news media.[20] In opposition to the government's stance on such a publication, in 2005 the Mainichi Shimbun and other prestigious newspapers condemned Yamano's work, thereby causing a wave of online backlash and rejection. As a response to this xenophobic comic, in 2006 South Korean satirical cartoonist Kim Sung-Mo published an opposing version, titled "Anti-Japanese Wave" (혐일류, hyeom il ryu).[21] Akiyama's "An Introduction to China"

[18] Ivi., p.6.
[19] Ivi. pp. 9-10.
[20] Norimitsu ONISHI, Ugly Images of Asian Rivals Become Best Sellers in Japan, in "The New York Times", 19 November 2005. https://www.nytimes.com/2005/11/19/world/asia/ugly-images-of-asian-rivals-become-best-sellers-in-japan.html 03-01-25
[21] Ugné MIKALAJŪNAITĖ, *Anti-Korean Wave And Far-Right Wing Nationalism In Japan*, in "Leiden University Student Repository", 2015, p. 18. https://studenttheses.universiteitleiden.nl/handle/1887/33619 , 03-01-25

discusses similar racist and xenophobic themes, depicting Chinese citizens as obsessed with cannibalism or prostitution, and upon release in 2005, sold 180.000 copies. This comic minimizes Japan's wartime crimes on humanity in China, such as the Nanjing Massacre, where historians estimate the death toll to be between 200.000 and 300.000 people by the hands of Japanese soldiers, and nearly 80.000 rapes occurred between 1937 and 1938. The manga fabricates a narrative where the Massacre never happened, as if it were Chinese government propaganda to promote the anti-Japanese sentiment.[22] Following the end of World War II, under the American occupation authorities in Japan publication of wartime stories was prohibited until the signing of the Treaty of San Francisco in 1952. Only then did war-themed manga (*jidaimono*) started to re-emerge on the market, and feudal times' stories about samurai or ninja became popular. However, it wasn't until the 1980s that manga works addressing World War II began appearing in bookstores, clearly characterised by pacifist ideologies and critiquing authoritarian military forces. Despite this sentiment, in the 1990s manga works carrying a revisionist current emerged, offering a more favourable portrayal of Japan's military history. Notorious examples of this trend were Kawaguchi Kaiji's "The Silent Service" (沈黙の艦隊, *Chinmoku no Kantai*), which encouraged people to gain independence from the new government, and "The Sound of Boots" (軍靴の響き, *Gunka no Hibiki*), which emphasizes the positive effects of Japan's occupation of Indonesia. Other literary works of this imperialist genre include Fujioka Nobutatsu's manuals, which minimise once again Nanjing Massacre and criticize the shortcomings of the Japanese education system in softening the students' patriotic spirit, Kobayashi Yoshinori's manifest advocating for a renewed sense of 'national pride', and more.[23]

From a historical perspective, nationalist manga were unfortunately not a novelty twenty years ago: ever since the 1920s, with the surge of socialist movements parody and proletary manga series became popular, and by the 1930s many manga were created and published to endorse the Japanese Empire military operations in the Pacific Ocean. The most popular manga title between the two World Wars was Tagawa Suihō's "The black stray" (ノラクロ, *norakuro*), published from 1931 to 1941 and comprised into ten volumes, which adopts a very nationalist perspective. It narrates the heroic battles of an army of dogs (metaphoric representation of Japanese soldiers) against goats (the Manchurian army), bears (Russian) and pigs (Chinese). The black stray dog that joins the imperial army of Japan reflects the rising militarism sentiment at the time, and once Japan went to war with the United States, the Japanese government demanded the collaboration of mangaka in endorsing

[22] ONISHI, "Ugly Images…", cit.
[23] ZACCAGNINO, CONTRARI, "Manga: Il Giappone…", cit., p. 8.

the war effort by creating pro-war manga.[24] The two instances of the 'pan-Asianism' sentiment, the first before the war and the latter that occurred in the 1990s are rather similar. The rise of a middle-class society and the subsequent increment of modern consumerism brought Japan closer to American influence and farther from its Asian cultural origins. The spread of the Japanese 'pan-Asian' discourse in the rest of Asia not only generated a claim to Asian commonality that is rooted in essentialism, but also an assertion of Japan's identity is constructed both on its Asian heritage and its receptiveness of overseas influence. Therefore, in this logic Japan's capacity to produce globally attractive cultural items and construct a global identity should have attributed to Japan a leading role in Asian communities. Popular culture has become an area where experts have tried to identify Japan's Asian identity while keeping in mind Japan's ability to indigenise foreign cultures. This was, once again, reminiscent of Japan's claim of superiority over other Asian nations based upon its experience of quick and successful 'westernization'.[25]

As mentioned in Chapter 1, Japan's first way of entry into Italy and other foreign countries has been animation. In the decades following the end of the war, Japanese anime entered U.S. households through television, and quickly became an integral part of the American popular culture landscape. The reason for such seamless introduction, is that these exported products had been created specifically with overseas audiences in mind. The familiarity of these imports prepared global audiences for the following wave of Japanese media in the 1980s and so on, especially manga, which effectively subverted Japan's image in the eyes of billions of people.[26]

Manga and anime characters disrupt materiality and the virtual effect of media: the worlds readers can encounter in manga are self-sufficient, therefore they don't necessitate connections with the real world for the fans to be able to understand or relate to the story. Manga does not necessarily prioritize the representation of society, as it portrays the real world only to the extent necessary to tell a story and develop the characters.[27] Moreover, every artist interprets society in their personal view, just as every reader has their own perception of the world. As a result, asking to determine whether one representation is more accurate than another becomes inherently subjective and ultimately unrealistic. Any evaluation of a manga's accuracy in portraying society would inevitably rely on the extent to which readers collectively agree on its ability to depict certain elements. Even

[24] ITO, "Manga in Japanese History…", cit. pp.34-35.
[25] IWABUCHI, Koichi, "Japanese popular culture and postcolonial desire for 'Asia'", in Matthew Allen, Sakamoto Rumi (edited by), Popular culture, globalization and Japan, New York, Oxford, Routledge, 2006, pp. 21-22
[26] TSUTSUI, *Japanese Popular Culture and Globalization…, cit.* pp.38-40
[27] LAMARRE, *The anime ecology…* , cit., p. 194.

then, a definitive answer would not be achieved, because factors such as the historical, cultural, and educational background of each individual have to be taken into account.

To know more about Japanese people's perception of representations of society and culture in manga, please see section 3.3.2, where answers collected through a reader's survey recently conducted among Japanese readers have been analysed.

3.2. Consumer Analysis (Italy and Europe).

In Italy, young people under the age of 15 constitute only 13.7% of the population (EUROSTAT 2018).[28] This demographic marginalisation carries significant, often underestimated consequences. Most concerning is the risk of slipping into social and economic underrepresentation, a condition typically associated with subordinate groups: exclusion from rights and resources, limited participation in societal and political processes, and a lack of relevance in terms of power. The small and shrinking size of the younger population renders them scarcely visible; their needs and requests are often perceived as irrelevant by those responsible for managing public goods. Their diminishing electoral weight is overshadowed by quantitatively much more consistent demographic groups.[29] In addition, their entry into the labour market frequently relegates them to precarious positions with low incomes. Therefore, their access to welfare services is often deprioritized in favour of meeting the growing demands for assistance from the elderly population. The result is the current tendency of our society to protect the rights acquired by past generations first and foremost, without allowing the new generations, socially invisible, to benefit from them. Paradoxically, the visibility of young people re-emerges when they become protagonists of negative events, such as addiction, bullying or substance abuse.

The phenomenon of NEETs ("Neither employed nor in education or training"), is as relevant in Italy as it is in Japan and other countries around the world. What is particularly alarming today is the persistently high rates of unemployment and inactivity among young people, which have continued unabated over time. Italy is struggling with this issue far more severely than other European nations. In 2023, the incidence of young people aged between 15 and 29 who are neither employed nor engaged in education or training programs is estimated to comprise 16.1% of the total youth population (ISTAT) – approximately 2 million people.[30] A multiplicity of factors contributes

[28] Carlo BUZZI, "Istituto IARD - La questione giovanile in Italia", Giovani e comunità locali, 0, 2019, p.14
[29] Ivi. p.15-16
[30] Istruzione e Lavoro, in "Noi Italia", 2024, https://noi-italia.istat.it/pagina.php?id=3&categoria=5&action=show&L=0#:~:text=Nel%202022%2C%20riguardo%20alla%20percentuale,europea%20(11%2C7%25).

to this phenomenon: from early school dropout rates to familial disadvantages, limited social mobility (which is a longstanding characteristic of the Italian society) and ineffective career guidance systems. Additionally, Italy's welfare model, which places the burden of supporting younger generations primarily on families, coupled with the absence of a robust work culture, exacerbates the issue. If we add to those who do not have a job those who work precariously and/or occasionally, the group of the affected demographic expands significantly, making it even more difficult for young people to plan for their future.[31] This challenge is far more complex than it was just a few decades ago, when adulthood was typically marked by external milestones such as completing one's education, entering the workforce, and leaving one's family home. Today, prolonged education, the increasing convolution of the labour market, and evolving relationships with parents contribute to a greater tendency for young people to remain within the protective confines of the family, often retaining characteristics of adolescence well into adulthood. Pragmatism appears to define the lives of young people today, a phenomenon further facilitated by digital media and social networks, which allows them to exist perpetually in "the present" while simultaneously navigating multiple situations, relationships, and communication flows. When it comes to the decision-making processes of young people, each choice is considered revocable, as nothing must appear irreversible in an uncertain and contradictory contemporary society. This mindset is compounded by the precariousness of employment, which has become a defining feature of younger generations' common experience. Since the economic and financial crisis of 2008, job insecurity has only intensified, with young people increasingly facing unstable employment conditions dominated by atypical and non-permanent work contracts. Therefore, job insecurity often translates into a broader existential insecurity, further complicating their ability to integrate well into society.[32]

Moreover, education has also been an important factor. In 2017 the incidence of graduates on the population aged between 25 and 34 was only 26.8%, putting Italy in one of the last places among the 35 OECD countries where the general average is 44.5% (OECD Education at a Glance 2018).[33]

3.2.1. Survey insights: social dynamics and manga consumption.

For the sake of this research paper, a reader's survey was conducted to explore opinions on the current comic book market in Italy, and better understand the preferences and opinions of readers across diverse demographic groups. The survey aimed to shed light on current trends, readership

[31] BUZZI, "Istituto IARD - La questione giovanile in Italia…", cit. p. 16
[32] Carlo BUZZI, Università di Trento e Istituto IARD, in "Giovani e comunità locali", n.0, 2019, pp. 13-20
[33] OECD, *Education at a Glance 2018: OECD Indicators*, OECD Publishing, Paris, 2018

habits, and the broader cultural reception of comics nowadays. The following sections will provide a detailed explanation of the survey questions and an analysis of the responses collected.

On the matter of methodology, the findings presented hereafter are based on data collected through an anonymous online survey conducted on Google Forms. Participation in the survey was entirely voluntary, and no personally identifiable information, such as email addresses, gender, or names, was collected. The survey consisted of 21 questions, covering the topics of comic book and novel consumption, personal opinions on the current state of the editorial panorama, and perceptions of Japan and its culture. In total, 133 Italian participants kindly contributed to the survey, providing an adequate dataset for analysis, and offering valuable perspectives that sustain the arguments previously discussed in this paper.

Listed below are the 21 questions that the participants were posed:

1) Age
2) Do you read comic books?
3) If yes, what kind of comic books do you read?
4) How do you read comic books the most?
5) How often do you read comic books?
6) When did you start reading comic books? Do you still read them?
7) When you hear the term "comic book", what type of comic book comes to mind first?
8) Have you ever read a novel written by a Japanese author?
9) If yes, how many books written by Japanese authors have you read in the past year?
10) Since 2020, have you noticed an increase in books about Japan and Japanese culture in bookstores or other sales outlets?
11) In your opinion, has there been a growing interest in Japan and its culture in recent years?
12) [Readers were then asked to elaborate on their answer to the previous question.]
13) What do you think influenced the most your knowledge of Japanese culture? (i.e. manga, anime, social media, books, movies, newspapers, podcasts etc.).
14) Do you watch anime? (Japanese cartoons/animated movies).
15) Have you ever purchased a paperback or e-book manga after watching a related anime series or movie?
16) What do you think about people who read comic books (specifically manga), or engage with other media from Japan (anime, music, drama etc.)?
17) Have you ever heard about Comics & Games conventions and other events? Have you ever been to one?

18) Would you like to visit Japan?
19) [Readers were then asked to elaborate on their answer to the previous question.]
20) If you've already visited Japan in the past, would you like to go back?
21) [Readers were then asked to elaborate on their answers to the previous question.]

Although the survey was mainly aimed at younger audiences, the age range of the participants was quite varied: one person (0.8%) reported being in the 10-15 age range, 11 people (8,3%) were aged 16-20, 53 people (39,8%) fell within the 21-25 age range, 32 people (24,19%) identified as being between 26-30 years old, and 36 people (27,1%) said to be above the age of 30.

All 133 participants answered the question: "Do you read comic books?". 86 people answered "yes" (64,7%), while the remaining 47 answered "no" (35,3%).

Then, in case of an affirmative answer to the previous question, the participants were asked to specify the kind of comic books they read, with the option to select multiple categories. Out of the 90 individuals who answered the question, the majority – 73 participants – stated that they read manga. Graphic novels were the second most popular choice, which 31 people said to read; webtoons came in third place, which were read by 24 participants. In fourth place were "Western" comic books, read by 23 people; and finally, comic strips came in fifth place, with 11 participants selecting this category.

When asked about their preferred method of reading comic books, 92 participants answered as follows (multiple options were allowed): 44 people read comics on their smartphones, 73 people buy and read physical copies of comics, 19 people read comics on their computers, 4 people read comics on their tablets and e-readers, and 7 people from magazines.

101 people answered the question: "How often do you read comic books?". 7 people said that they read comic books daily (6,9%), 13 read comics a couple of times a week (12,9%), 41 people read them a few times a month (40,6%), and finally 40 people said they rarely read comics (39,6%).

The question afterwards was: "When did you start reading comics books? Do you still read them?", to which 108 people answered as follows:

- "I started reading comic books when I was a kid, and I still read them now.", 64 people (59,2%).
- "I started reading comic books when I was a kid, but I don't read them anymore.", 23 people (21,3%).
- "I started reading comic books when I was an adult, and I still read them now.", 15 people (13,9%).
- "I started reading comic books when I was an adult, but I don't read them anymore.", 3 people (2,8%).

- “I’ve never read comic books”, 3 people (2,8%).

The shifting perspectives of comics in Italy (question #7) will be discussed in section 3.2.2.

Then, readers were asked to say whether they had read any novels from Japanese authors, to which 74 people answered “yes” (56,5%), 48 said “no” (36,6%), and 9 people said they “couldn’t recall” (6,9%), for a total of 131 responses.

Following this, participants who provided an affirmative response were asked to say how many they novels by Japanese authors they had read in the past year. Out of the 133 participants, 59 people reported having read at least one. Interestingly, although several participants stated they hadn’t read any Japanese novels in the past year, they also expressed the intent to read novels written by Japanese authors in the future.

The survey then transitioned to broader questions, focusing on the personal opinions of the interviewees. The key objective was to determine whether respondents had noticed an increase in publications related to Japan and Japanese culture in bookstores or other sales outlets, particularly since 2020. To this question, 109 people answered “yes”, 17 people answered “no”, and 7 people chose to not state their opinion.

Then, to explore further societal trends, participants were asked to state if they believed that interest towards Japan and Japanese culture has been growing in Italy in recent years. A significant majority of 121 people affirmed that they do think society’s interest in Japan has been growing, while 8 people disagreed, and 4 people did not provide an answer.

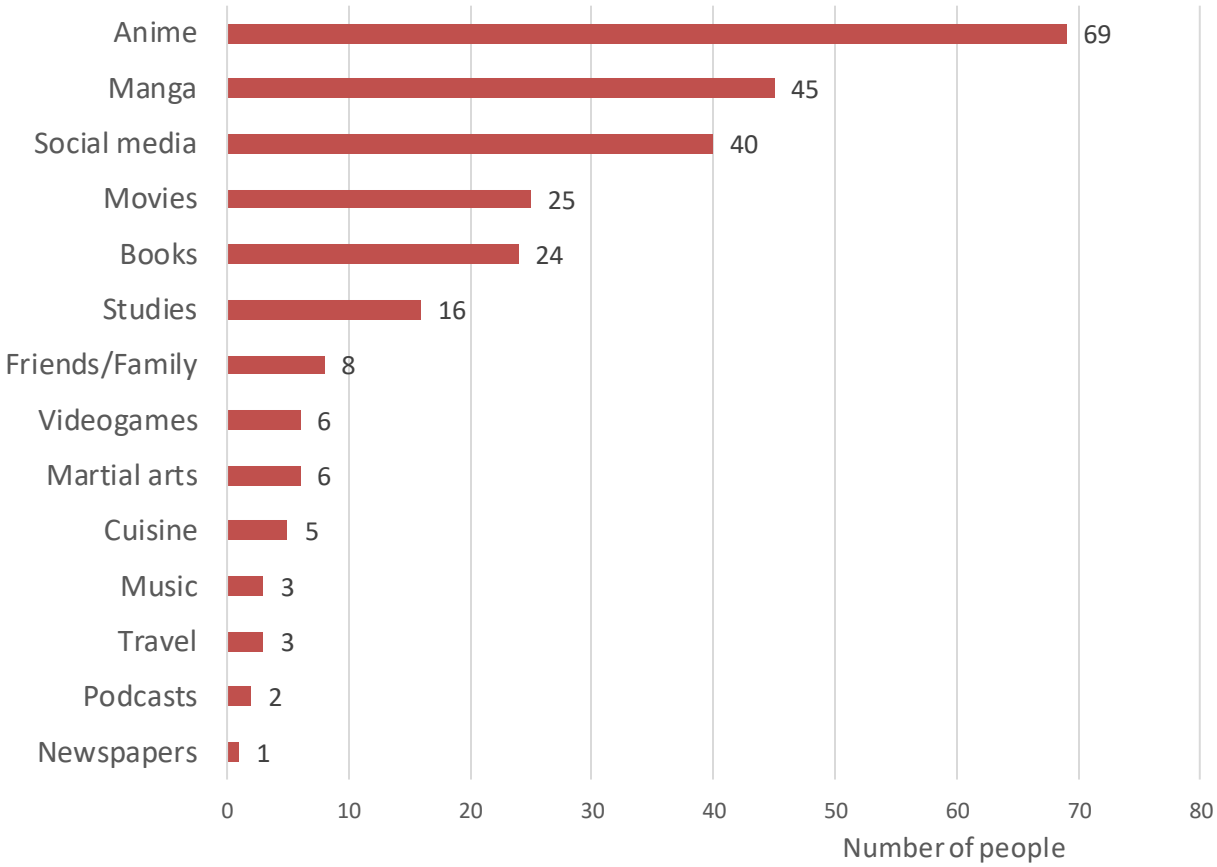
Finally, respondents were asked to elaborate on their answers by sharing their personal opinions and observations. The next paragraph will summarize the key themes and points raised by the participants in their open-ended responses.

The growing fascination with Japanese culture in Italy and beyond has been attributed to a confluence of factors. Many respondents noted the market-driven expansion of Japanese media: increased advertising, broader distribution channels (e.g., manga now sold in bookstores and even supermarkets), and a surge in translated works, from manga and novels to video games and films, have made Japanese content more accessible than ever. This, however, has led some to criticize market oversaturation, with an overabundance of choices diluting what once was a more curated, albeit smaller, pool of content. Participants also highlighted globalization and the allure of the “exotic” as key drivers. As Eurocentric cultural dominance declines, audiences increasingly seek fresh stimuli from non-Western origins. Japan’s blend of ancient heritage and hyper-modernity,

epitomized by its architecture, cuisine, and media, resonates strongly with readers worldwide. Social media, YouTube creators, and Twitch streamers have only amplified this visibility, transforming Japan from a niche interest into a mainstream phenomenon. Streaming platforms, like Netflix or Amazon Prime Video (perceived as more accessible to the general audience than specialized services like Crunchyroll) and the global rise of K-pop have further fuelled cross-cultural curiosity. Demographic shifts also play a role: the current generation of young adults, who grew up with '90s anime on TV, now wield economic influence and drive demand for Japanese products. Meanwhile, younger audiences engage through tourism, social media trends, and communal spaces like conventions, thereby fostering a sense of shared identity. Interestingly, some even argued that Japan's "novelty" has already faded, as it competes with rising Asian cultural powerhouses like South Korea, Vietnam, and Thailand. Once a revelation, Japanese media now faces the challenge of sustaining interest in an increasingly crowded global market.

Intermediality also appeared to play a significant role in developing readers' interest in Japan and its culture. Participants were asked to state the medium through which they had acquired the most knowledge about Japan and Japanese culture. To guide their responses, a brief list of examples was provided (i.e. manga, anime, social media, books, movies, newspapers, podcasts, etc.). While some of these mediums, such as manga and anime, emerged as clear favourites, many people mentioned a diverse range of other sources, reflecting the multifaceted ways in which Japanese media reaches audiences globally. Figure 3.1 visualizes the readers' answers; once again, multiple answers were allowed. The majority of respondents (69 people) stated they watching anime was their main source of information about Japan, and in second place were manga, which 45 people chose as their primary outlet for Japanese culture. Other equally relevant answers were "social media", named by 40 people, then "movies", "books", "high school/ university/ personal studies", and so on.

Figure 3.1: Sources from which Italian people acquired their knowledge of Japanese culture.



The majority of readers primarily seemed to consume anime and TV series, which then led them to approach manga and other media. When asked if they watch anime, as in Japanese cartoons and animated movies, 94 people answered "yes", and 37 people answered "no".

Regarding the interaction between different forms of media, readers were asked whether they had ever purchased a paperback or e-book manga after watching a related anime series or movie. This question aimed to explore the influence of one medium on the consumption of another, particularly in the context of manga and anime. Out of the 133 respondents, 77 people answered "yes" (59.2%), indicating that anime or movies had directly influenced their decision to purchase manga. Meanwhile, 53 respondents (40.8%) answered "no", stating that they had not made such a purchase. Three participants chose not to answer the question. These findings further highlight the significant role of cross-media engagement in driving interest and consumption within the Japanese entertainment industry.

The shifting perspectives in Italy of Japanese media fans (questions #16 and #17) will be explored in detail in the following section 3.2.2. For the purposes of this discussion, however, the attention

will now be diverted to the final part of the conducted survey, which examines the relationship between readers and Japan. More specifically, the participants were asked "Would you like to visit Japan?", to which an overwhelming majority of participants (124 people, representing 96,9% of all respondents) answered "yes". Conversely, only 4 participants (3,1%), stated that they were not interested in visiting the country.

A wide range of motivations for wanting to visit Japan emerged from the survey, including curiosity towards its culture, history, and natural landscapes. Many were drawn to the country's stark contrasts between tradition and modernity, as well as its unique traditions and practices. Others highlighted more practical life goals, such as improving their Japanese language proficiency or enjoying its renowned cuisine. Other reasons cited were the passion for intercultural exchange, witnessing architectural marvels, or shopping for Japanese brands. Additionally, some participants mentioned positive past experiences that left them eager to explore more, and several stated they are curious to see whether the depictions of Japan in anime and manga do in fact align with reality.

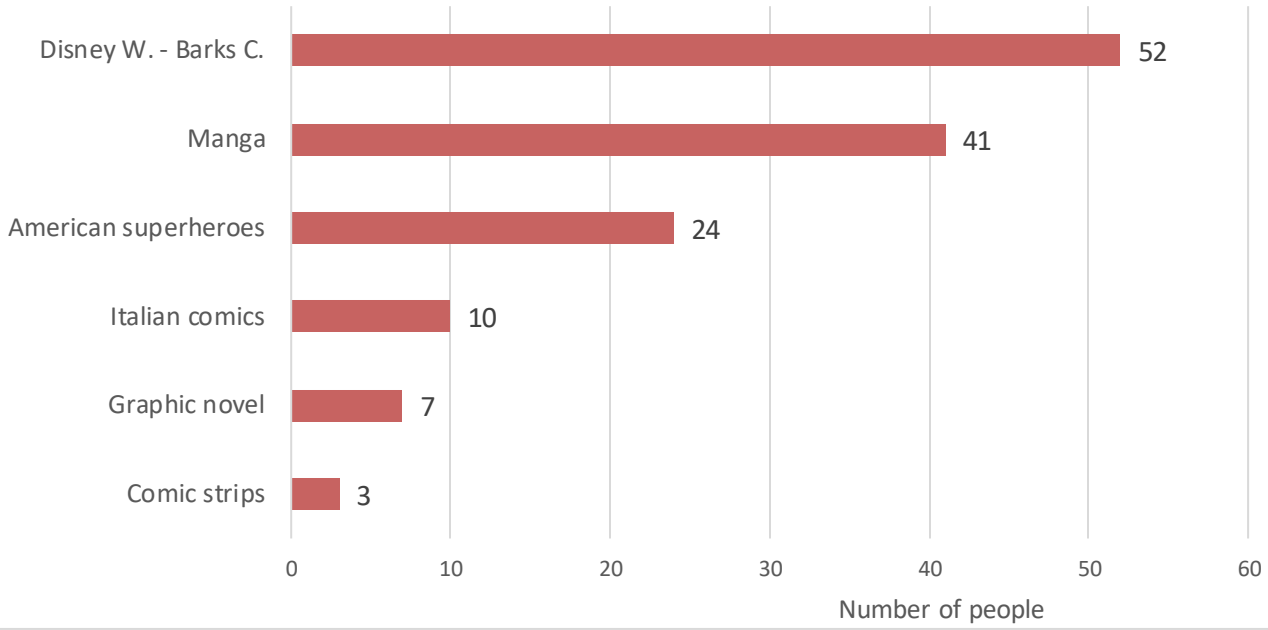
To conclude the survey, readers who had given an affirmative answer to the previous question were asked: "If you've already visited Japan in the past, would you like to go back?". A total of 51 respondents answered this last question. Among them, 48 people (94,1%) expressed a desire to return to Japan, while only 3 (5.9%) stated that they would not.

The reasons for their positive experiences are varied: some found the quality of life in Japan to be better than in their home country, while others mentioned not having enough time to fully explore and experience everything they wanted to. Additionally, some expressed an interest in moving there for work opportunities. Overall, Japan not only met but often exceeded their high expectations.

3.2.2. Shifting perceptions of comics in Italy.

One of the primary objectives of the survey was to explore the interviewees' perceptions of comic books. Specifically, one of the questions asked was: "When you hear the term comic book, what type of comic book comes to mind first?". This question was aimed at identifying the immediate mental associations participants have with the word "comic book", and how their preferences or cultural context may shape these perceptions. A total of 121 people responded to this question, and their answers are overall summarized in Figure 3.2. As expected, the majority of people answered their idea of "comic books" coincides with American productions, but a quite large number of people stated they associate the term "comic book" with manga, which is a surprising result that would have probably been different only a few years before this moment.

Figure 3.2: What Italian readers first think of when hearing the term "comic book".



As mentioned earlier in section 1.2.1, in the past consumption of manga, anime, videogames, and other Japanese media has been associated with countless negative stereotypes, and people's interests were often subject to stigma. In this survey, a couple of questions were aimed towards defining whether such assumptions and fixed mentality have changed over the past decade. To address this, participants were asked "What do you think about people who read comic books (specifically manga), or engage with other media from Japan (anime, music, drama etc.)?". The aim of this question was twofold. Firstly, it sought to understand the perspectives of fans regarding their current level of comfort in enjoying their favourite types of content openly. Secondly, it aimed to investigate the opinions of those outside the fans' community and assess whether societal attitudes towards individuals who were once labelled as *'otaku'* (a term that carried a negative connotation just fifteen years ago) have changed. This dual approach allowed for a broader understanding of both internal and external perceptions regarding the consumption of Japanese media today.

The overall impression gathered from the responses was positive. The majority of people expressed an accepting or neutral stance toward fans of Japanese media. Many respondents expressed that they believe people who enjoy Japanese pop culture media are cultivating a hobby as valid and widespread as any other, one which shouldn't entail such a negative stigma. Some highlighted, based on personal experience, that Japanese media fans tend to be more emotionally tuned and open-minded, embracing diverse cultures rather than rejecting non-Eurocentric content. Others emphasised that fans are simply engaging in a harmless activity, reading and appreciating the

beauty and artistic variety of the Japanese works. Some mentioned being fascinated by people who like to explore international media.

Fans themselves acknowledged that while certain stereotypes persist, they were content with the opportunity to share their interests with a growing community, and wish this increased interest will lead to more work opportunities in the media industry in the future, therefore looking forward to more content becoming available. In general, many outsiders seemed to either be indifferent or respectful towards fans, while fans expressed a desire to connect with more people who share their interests and broader acceptance of their preferred media.

Of course, several participants also highlighted certain negative aspects associated with the Japanese media fandom. While some of these criticisms appeared to stem from persistent stereotypes, others seemed based on personal experiences and observations.

A recurring concern was the violent or explicit nature of certain content, at times carelessly marketed towards children, despite being more appropriate for adult audiences, who could actually find it interesting and entertaining. Others criticized the tendency of some fans to exclusively consume Japanese media, to the point of fetishization of Japan and its culture. Some mentioned the fine line between being a "normal" fan, and being an "*otaku*" – someone who becomes overly absorbed in the 'bubble' created by Japanese media. Additionally, some readers admitted they simply don't understand the appeal behind such a widespread phenomenon. Drawing from personal experiences, critics noted that some fans become so immersed in media consumption that they lose touch with reality, allowing their hobbies to entirely define their identity. Stereotypes surrounding Japanese media fans were also reiterated: the dyed hair, peculiar clothing style and general "emo" demeanour; fans were portrayed as Japan-fanatics pandering to their inner child, and as "nerds" who blindly follow trends while presumptuously claiming to be unique.

Despite these criticisms, the cultural impact of Japanese media and its fandom extends beyond individual perceptions, manifesting in vibrant physical and virtual communal spaces, such as comic book events, video game conventions, cosplay meetings and many online communities.

Therefore, the questions about the perception of Japanese media fans continued by asking the audience about these gatherings. All participants answered the questions "Have you ever heard about Comics & Games conventions and other events? Have you ever been to one?". 76 people stated that they do know about such events and have been to one/some themselves (57,4%), 54 people answered that while they have never been to one, they know about the existence of such events (39,6%), and finally, only 4 people stated that they knew nothing about them (3%).

3.2.3. Youth engagement with comics and the new readership.

How the pandemic has impacted younger generations is still being explored. It is not yet possible to determine how society's perception has changed, or to quantify how forced isolation, family losses, and missed opportunities due to the emergency have affected their psyche. In response to forced isolation, the world's population has taken refuge in the use of social media. As part of this increased media consumption, manga has been one of the widely explored means of distracting people from the unprecedented situation. Many people have started reading more frequently, and manga has especially reached young people who up until recently had not been able to freely explore new interests, both due to external commitments (study, sports, etc.), and external interference, such as negative stereotypes associated with Japanese media consumption. The new intellectual freedom, no longer subject to limitations by contact with society, has allowed young people to cultivate new interests without external judgment. Of course, this was a phenomenon immensely broader than media interests, and for many young people, it also touched on the exploration of their gender identity or their political orientation. During the lockdown, streaming services, which have been at the centre of commercial flows since the beginning of the pandemic with record-breaking revenues, introduced many anime series to their platforms that had great success. This consequently pushed a portion of the public to immerse themselves in the world of Japanese media, perhaps for the first time, and start reading manga related to the shows they had seen.

Millennials and Generation Z have been noticed to perceive books not only as sources of knowledge and entertainment, but also as collectable and displayable objects of aesthetic and cultural value. Meticulously designed editions, featuring custom illustrations, hardcovers, and protective cases, have significant market attention from these demographics. This shift underscores a broader trend in which younger generations value the physicality and craftsmanship of books as extensions of personal identity and taste. In addition to their enthusiasm for visually appealing editions, younger demographic groups are among the most dedicated readers, actively participating in literary communities and discussions. They frequently use other services, such as subscription-based platforms and online spaces, to find and endorse adaptations of literary works they find compelling, demonstrating a varied approach to storytelling consumption. Their social connectivity cultivates an environment of peer-to-peer recommendation and discourse, amplifying their influence within the broader publishing ecosystem.

3.3. Consumer Analysis (Japan).

This section focuses on a parallel investigation to the one conducted with Italian readers, focusing on the Japanese audience. The results of the reader's survey will be introduced by a brief explanation of the younger generations' reading habits and consumer behaviour.

3.3.1. Youth reading habits in Japan.

The free trade agreement between Japan and the EU (2019) removes tariffs and other trade barriers as well as a large part of the 1 billion euro of duties paid annually by EU companies exporting to Japan.[34] It's a well-known fact that Japanese consumers hold very high expectations towards service and product quality. The retail market in Japan is facing significant challenges due to a combination of the preexisting factors of the ageing population and the economic crisis brought by the Covid-19 pandemic (Nielsen 2020).[35] The market is not only highly saturated but also further impacted by the fact that Japan's population has the highest life expectancy in the world. The population is projected to drop could drop below 100 million by 2049. Additionally, in 2019 the number of children aged 0-14 dropped to 15.2 million, accounting for only 12.1% of the total population, the lowest figure ever recorded.[36] These demographic shifts are reshaping the retail landscape, creating challenges for certain businesses and opportunities for others.

Japanese society considers itself highly egalitarian and middle-class. Quality is paramount, and it extends beyond functionality to aesthetics. Good design is a high priority in Japan, it's evident in public spaces like parks and shops, as well as in offices and homes. Furthermore, Japanese consumers generally prefer quality over mass consumption.[37] However, in recent years, due to the growing range of discount stores, and not least online retailers, price sensitivity has increased. Coupled with the long economic slowdown, this has led some consumers to decide to move on from previous conceptions, and start to prioritize affordability over quality. Despite this, Japan remains a technology-driven society with a strong affinity for electronic gadgets.[38]

Foreign firms often find success in niche markets where Japan has generally been less competitive; certain agricultural products (namely wine and cheese from Europe), or high fashion items. In these areas, Japanese consumers are less likely to perceive imports as a threat to national products, and

[34] HAGHIRIAN Parissa, Japanese Consumers' Behavior: By Age And Gender, in "EU-Japan Centre for Industrial Cooperation", 2021, p.9
[35] Ivi. p.10
[36] Ivi, p.11
[37] Ivi, p.15
[38] Ibid.

are more likely to embrace them. Despite the recession, Japanese consumers didn't stop purchasing high-end products, albeit after enduring longer periods of saving up for them.[39]

In Japan, millennials are known as the "*yutori generation*" (ゆとり世代, "free from pressure generation").[40] Their coming of age happened during a series of crises: the 2008 global financial crisis and the 2011 tsunami and nuclear disasters. As a result, they have not experienced the era of rapid economic growth that previous generations enjoyed. Stagnant wages and economic instability are the main reasons why many millennials in Japan delay or even forego marriage, home ownership and childbearing.[41] Compared to earlier generations, Japanese millennial consumers exhibit greater frugality in their spending habits, prioritizing experiences over material possessions, especially if those experiences are suitable for sharing on social media platforms like Instagram.[42] This shift reflects a broader desire for a more simplistic, more grounded lifestyle. In a sense, millennials in Japan are quite different from millennials in other countries, as marketing strategies have adapted to this trend, focusing on offering products that are affordable, high-quality, and minimalist to appeal to younger audiences.[43] In terms of media consumption, male millennials tend to purchase more comic books and tech gadgets. However, as the number of young people not earning full-time wages is increasing, cost-conscious consumer behaviour has become the norm, further evolving the market and spending predictions.[44]

Generation Z (Gen Z) is known in Japan as the "*satori generation*" (悟り世代 "enlightenment generation"). The label reflects their perceived detachment from material desires, akin to achieving the Buddhist state of enlightenment, although one could argue it stems from a sense of resignation due to macroeconomic challenges.[45] They are also certainly less politically inclined than their predecessors, as they have been shaped by political, economic and environmental uncertainty.[46] As digital natives, the *satori generation* grew up with instant access to all sorts of information. Therefore, they tend to show a preference for quick results quicker and fewer limitations.[47] Traditional media formats, such as television, are declining in popularity among younger consumers. While Gen Z values ethical products, only a minority are willing to pay more for

[39] Ibid.
[40] ゆとり世代 (translated), in "Wikipedia.org". https://ja.wikipedia.org/wiki/%E3%82%86%E3%81%A8%E3%82%8A%E4%B8%96%E4%BB%A3 09-01-25
[41] HAGHIRIAN, Japanese Consumers' Behavior: By Age And Gender, cit., p.29
[42] Ivi, cit., p.33
[43] Ibid.
[44] Ivi, cit., p.29
[45] Satori Generation"さとり世代", in "Wikipedia.org". https://en.wikipedia.org/wiki/Satori_generation 09-01-25
[46] HAGHIRIAN, Japanese Consumers' Behavior: By Age And Gender, cit., p.35
[47] Ivi, p.36

them.[48] However, as they care more about personal image and success than other generations, they are more likely to invest in products that enhance their social standing among peers. Unlike their counterparts in other Asian nations like China or South Korea, Japanese Gen Z consumers are less influenced by celebrity endorsements.[49] On the contrary, they are avid consumers of second-hand products available online and prioritise creating private spaces (either physical or digital) to surround themselves with things that bring them joy. In a fast-paced, hyper-connected, and workaholic society, young people actively seek "me-time" to reduce stress and cultivate personal well-being.[50]

While television remains the most influential media platform in Japan, younger generations are opting out of traditional TV consumption and prefer to access content through their mobile devices. Social media has begun to substitute traditional information channels such as newspapers and radio, although this shift is less pronounced among audiences over the age of 30. Individuals under 40 lead in overall content consumption with half of their media engagement occurring on smartphones, particularly teenage women aged 15 to 19 who are the ones consuming most content of any kind. Interestingly, Japanese consumers seem to be the least likely to acknowledge overconsumption of media, in stark contrast to their Chinese counterparts, who exhibit greater self-awareness in this regard. Another distinctive feature of the Japanese market is its undying reliance on cash circulation and cash transactions. However, recent years' efforts towards modernising infrastructures, especially in preparation to hosting the Olympic Games, have generated a noticeable rise in cashless payment methods.[51]

The number of Japanese consumers living alone has been on the rise in recent years: single-member households consisting of elderly people aged 65 and older are projected to rise to 17.7% of the total households by 2040. People living alone often prioritize their independence, and spend their free time and disposable income on the hobbies, interests and activities that they enjoy.[52]

3.3.2. Readers' opinions on the international success of Japanese works.

Regarding the field research for this paper, a reader's survey was also conducted among Japanese readers, albeit with a smaller sample size. The initial aim of the survey was to inquire about the participants' reading habits, before expanding to explore their perspectives on the growing

[48] Ivi. p.37
[49] HAGHIRIAN, Japanese Consumers' Behavior: By Age And Gender, cit., p.39
[50] Ivi, cit., p.36
[51] Barrett ISHIDA, *Japanese Media Consumption Trends and Behavior*, in "Medium", 17 January 2020. https://medium.com/@tamkox/japanese-media-consumption-trends-and-behavior-2020-1a33042b83d5 15-01-25
[52] HAGHIRIAN, *Japanese Consumers' Behavior: By Age And Gender* , cit., p.42

popularity of manga, intermediality, the current state of the publishing market, and their views on Japanese cultural products abroad. The complete list of questions asked, along with their translations, will be provided below. Although the survey reached a smaller audience (72 people) compared to the Italian counterpart, since the majority of the participants were below the age of 30, the findings of this research offer an interesting perspective into the attitudes and opinions of younger generations.

The following questions were posed:

1) 年齢 (Age)
2) 漫画を読みますか。(Do you read comic books?)
3) 漫画を読む時、最もよく使う方法は何ですか？(When reading comic books, what method do you use the most?)
4) [Readers were then asked to elaborate on their answer to the previous question.]
5) 日本以外での漫画の人気の高まりについて、どう思いますか？(What do you think about the growing popularity of manga outside of Japan?)
6) 漫画は日本の文化を正確に写し出していると思いますか？その理由も教えてください。(Do you think manga accurately portrays Japanese culture? Please elaborate on your answer.)
7) 漫画と映画、ゲーム、商品など他のメディアとのコラボレーションについてどう思いますか？(What do you think about collaborations between manga and other media, such as movies, games, and merchandise?)
8) 日本文学作品が国際的に出版され、翻訳されることは重要だと思いますか？(Do you think it is important for Japanese literature to be published and translated internationally?)
9) 出版業界はもっと革新すべきだと思いますか、それとも現状のままで問題ないと思いますか？(Do you think the publishing industry needs to innovate, or is it alright as it is?)
10) どのような点が変わるべきだと思いますか？出版業界にはどのような問題があると思いますか？ (What aspects of the publishing industry do you think should change? What issues do you think are there?)
11) 近年、日本への観光客の数が増加したと思いますか？(Do you think there has been an increase in the number of tourists coming to Japan in recent years?)
12) もしヨーロッパの書店に入って、棚に漫画が並んでいるのを見たら、どう思いますか？(If you walked into a bookstore in Europe and saw manga lined up on the shelves, what would you think?)
13) 海外で日本のブランドの商店（ユニクロ、無印良品など）を見かけたら、どう思いますか？(What would you think if you saw Japanese brands stores - such as Uniqlo or Muji - overseas?)

14) もし海外で日本風のグッズを持っている人を見かけたら、どう思いますか？(What would you think if you saw someone carrying Japanese-style goods/merchandise abroad?)

The answers collected will now be summarised and analysed at length.

Similarly to the survey directed to Italian audiences, the age range of the participants was quite young: 31 people (41,3%) said being aged 16-20, the majority - 37 people (51,4%) fell within the 21-25 age range, 3 people (4,2%) stated being between 26-30 years old, and finally one person (1,4%) said to be above the age of 30.

All participants answered question #2: "Do you read comic books?". The majority of respondents, 59 people, answered "yes" (81,9%), while the remaining 13 answered "no" (18,1%).

The following question, which explored the participants' preferred method of reading manga, received 67 answers. As in the previous survey, readers were allowed to select multiple options. The most popular was reading via smartphone, with 49 people opting for this method to read manga. *Tankōbon* followed, which 26 people purchase, while magazines and PC were less common, used by only 3 and 1 reader respectively.

Participants were then invited to elaborate on their answer and share the reasons for preferring one format better than another. The primary reasons for reading manga on smartphones are convenience and practicality. Many apps offer free or low-cost access, allowing users to enjoy manga anytime, anywhere, without cluttering their already cramped rooms with printed copies or magazines. When a reader's interest in a story is sparked, via the internet they can instantly access new chapters without waiting weeks or months for magazine or *tankōbon* releases. Additionally, magazines often bundle the latest chapters for multiple series, forcing readers to pay for content they may not be interested in. On the other hand, fans of printed manga appreciate the permanence of owning a physical copy of their favourite works, which they can also revisit at any time. They also enjoy displaying their collections, which gives them a feeling of accomplishment. Many readers find reading on small screens uncomfortable for their eyes, and prefer the higher quality of *tankōbon*, which generally include comments from the author that don't appear in the magazine. As the schedule is quite rushed for magazines, sometimes quality drops are inevitable, like errors and missing frames due to page limits, and fans are left to wait for mistakes to be solved in the official volume release. For some, there's a strong attachment to the tradition of buying physical manga copies, making them reluctant to switch to digital platforms or subscription services.

Regarding question #5, “What do you think about the growing popularity of manga outside of Japan?”, 64 respondents shared their thoughts. All admitted being happy about the growing popularity of manga overseas. They noted that it has evolved to become a conversation starter with foreigners and a source of surprise and pride knowing that manga and other Japanese cultural products are so well-received abroad. Many hoped this popularity would lead international manga competitions, sales conventions, and similar events to be held more frequently in the future. However, some respondents also expressed their doubts or certain topics, pointing out that action manga, while incredibly popular overseas, often doesn't reflect Japanese culture and don’t necessarily contribute to deepening foreign fans’ understanding of Japan. Others noted the differences in trends between Japan and overseas markets, and emphasised that not all Japanese people are equally interested or knowledgeable in manga. Some even observed that manga’s popularity abroad sometimes seems to surpass its domestic appeal. Finally, a few participants highlighted the government’s and publishers’ responsibility to address potentially misleading elements in manga, such as outdated wartime symbols like the rising sun flag, which have appeared in popular series like *Demon Slayer* (鬼滅の刃), *One Piece* (ワンピース), *Zatch Bell!* (金色のガッシュ!!) and more.

The representation of cultural and historical elements in manga has been discussed previously in section 3.1.3. Building on this, additional insight on the issue was kindly provided by the readers interviewed for this survey, through their answers to question #6, “Do you think manga accurately portrays Japanese culture?”, which will now be discussed. The opinions collected showed a fifty-fifty division among those who believe manga can be considered representative of Japanese culture, and those who disagreed. Many participants agreed that an author’s cultural background inevitably shapes their work, often revealing a distinctly Japanese spirit. Manga depicting everyday life, such as school or office settings, were seen as accurate reflections of Japanese culture. Works like *Demon Slayer* and other traditional-themed stories were praised for incorporating numerous Japanese elements and providing insights into traditional lifestyles and worldviews. Some respondents noted that while manga and anime popular among women overseas often portray Japanese culture authentically, those targeting male audiences tend to be more exaggerated. A few readers emphasized how manga characters allow them to empathize and gain insight into emotions, values, and beliefs often unspoken in Japanese society. Others highlighted the use of real Japanese towns as settings for certain stories. Even globally popular series like *One Piece*, *Naruto*, and “Attack on Titan”, though not set in Japan, sometimes feature cultural elements such as traditional phrases (like

itadakimasu and *gochisōsama*). Ultimately, many respondents noted that the cultural accuracy of manga depends largely on its genre, with school life narratives often seen as more authentic.

Conversely, many participants argued that manga should not be considered an accurate representation of Japanese culture, nor classified as "culture" in the traditional sense. Some contended that if manga is regarded as part of Japanese culture, then paradoxically its fictional depictions would also qualify as Japanese culture itself. They emphasized that "Japanese culture" typically refers to aspects grounded in reality, while manga should instead be categorized as subculture. Several respondents noted that school-themed manga often portray an idealized or conceptual image of student life that doesn't reflect actual experiences in Japan. Concerns were raised about foreign readers mistaking fiction for reality due to their limited cultural context. Other criticisms focused on the exaggerated portrayal of erotic scenes and depictions of women, often seen as male fantasies that promote biases against Japan. Many felt that the characters' personalities, appearances, and behaviours in manga are often overly dramatized, distancing them from real Japanese life. Some doubted whether Japanese culture could ever be accurately depicted or meaningfully exported through manga. Additionally, participants stressed the importance of recognizing an author's perspective as individual rather than representative of Japan as a whole, given the significant regional and generational variations within the country. ***

A total of 63 people answered question #7, “What do you think about collaborations between manga and other media, such as movies, games, and merchandise?”. The insight the readers provided will be summarised hereafter. Collaborations between manga and other media, such as movies, games, and merchandise, were generally viewed as positive and effective for boosting economic growth and expanding audience reach. According to some readers, partnerships between different forms of media not only provide new content for fans but also offer creators and media producers opportunities to attract fresh customer groups and increase demand for related products. Many respondents noted that anime adaptations and videogames often bring manga worlds to life, sparking renewed interest in the original work and generating enthusiasm for Japan's culture as a whole, as people who previously weren’t knowledgeable about it would have the opportunity to learn further. On the other hand, a few readers expressed their concern about the quality of live-action adaptations, particularly when they diverge significantly from the original plot or disregard the author’s intentions. Some felt disappointed by poorly executed performances or scripts crafted purely for profit. While the commercialization of manga-related products is seen as a practical way to generate revenue, a few participants stated that as adaptations often are heavily adjusted to cater to different audiences, there’s the possibility that fans of the original work won’t necessarily be

interested in them, or in purchasing random or poor-quality goods. Overall, readers agreed that collaborations are effective for making manga accessible to broader audiences, even to those unfamiliar with Japanese media, and help bridge cultural gaps internationally.

The next question explored whether readers believed it is important for Japanese literature to be translated and published overseas. The majority of respondents, 68 people, answered “yes”, while the remaining 4 answered “no”.

A particularly interesting aspect explored through this survey is the readers' thoughts on the issues within the Japanese publishing industry, ergo what areas need improvement and what challenges it faces. The respondents provided valuable insight, which helped to evaluate the perception of the industry among the general public. Question #8, “Do you think the publishing industry needs to innovate, or is it alright as it is?”, received 71 answers. 39 people (54,9%) expressed concern that without innovation, there’s the risk the industry will decline, while 27 people (38%) disagreed, believing it is likely fine as it is. A few people brought up different points, for example, that changes within the industry are already occurring, or that more than the manga industry per se, the broader media industry should innovate without losing its identity.

Then, readers were asked readers to elaborate on their previous answers, specifically by stating their opinion on current issues and identifying areas for improvement within the publishing industry. Many readers mentioned the issue with bookstores, noting that while manga was once widely available, only top-selling titles are now stocked. Authors encounter more challenges in selling their works, as the number of bookshops is decreasing and mail orders and digital content become mainstream. Fewer people are buying printed works, and the demand is mostly from fans who want to collect physical copies of manga. Readers also brought up that the industry has been focusing too much on digital content, for example, some magazines decided to discontinue print and go fully digital, although some readers liked the tactile experience of browsing through magazines in bookstores and libraries. Some people disagreed on this point, arguing that as demand for digital manga is increasing, the industry should consider scaling down its print business. To keep print media relevant, respondents suggested focusing on its unique appeal, such as the sense of accomplishment from collecting physical manga, and at the same time educating consumers and creating subscription services for online-only content. Some expressed a more pessimistic view, saying that the publishing industry has no future - as paperless culture advances and publishers will have to forcibly diversify their offer sooner or later. They also emphasized the need for publishers to leverage social media for advertisement: as manga apps and the internet are now mainstream, simply promoting paper media will lead to its decline. Some attributed the lower reading rates to the

overabundance and wide accessibility of various forms of entertainment, even through piracy. Another critical issue raised was the quality of adaptations. Readers said publishers should focus on avoiding discrepancies between the scriptwriter and the original author, which often occur due to a lack of cooperation between the parties. Many also raised concerns about the lack of respect for authors' rights, with many citing unstable contracts, unpaid work until publication, tight schedules, and low wages for apprentices and assistants as significant problems within the salary structure. To address these issues, respondents proposed several solutions. Some said the industry should publish less tabloids which damage people's privacy, put more effort into training writers and employing more translators, and secure government funding for cultural diplomacy. Others also suggested allowing retailers to adjust prices to help revitalize local bookstores.

As an ulterior way to assess the growing interest in Japan and its culture, readers were asked to share their views on tourism trends in recent years. When asked: "Do you think there has been an increase in the number of tourists coming to Japan in recent years?", 67 people (94,4%) answered "yes", one person (1,4%) said "no", and 3 people (4,2%) were unsure.

Question #12 asked readers: "If you walked into a bookstore in Europe and saw manga lined up on the shelves, what would you think?". All respondents expressed delight at the rising popularity of manga, describing a sense of joy and pride in learning that Japanese culture is widely appreciated around the world. Many mentioned feeling a sense of affinity and connection with people from other countries who share their love for manga. Interestingly, some respondents even stated that manga has become the core of modern Japanese culture, and that they take pride in the international recognition of their country's cultural and creative industries. Some participants shared their pleasant surprise at encountering manga in foreign bookstores, expressing their curiosity about seeing which titles are popular abroad. Many also mentioned their interest in purchasing the translated versions, although they also noted a sense of alienation at not being able to read them in their original language and some concern over how cultural elements (such as expressions and dialects), are adapted for international audiences. Additionally, many readers stated that manga give them a sense of familiarity and belonging, even when they are far from home. For Japanese people living abroad, manga serves as a comforting link to their culture, helping to alleviate feelings of homesickness which in return fosters a demand for manga even outside Japan. Through encountering manga abroad or learning about its growing popularity overseas, the 72 Japanese readers surveyed (who in this case acted as a representative sample of the Japanese population) were faced with the realization that what was once created primarily for their own consumption is no longer limited to Japanese national borders. Interestingly, the globalization of manga has not

sparked negative reactions among the respondents, who have instead embraced the expansion of its audience, viewing it as a positive development for Japanese culture.

When asked to express their opinion on the overseas expansion of Japanese brands (like Uniqlo or Muji), a large number of respondents recognized this as a positive sign of growth and global acknowledgment of the quality of Japanese products. They noted that while the selling point for these products within Japan is "affordability and high quality", prices are obviously higher abroad, due to import costs and other factors. Some expressed surprise at the inflated prices, while others were curious about how the same products on sale in Japan might differ in foreign markets. For some, encountering these brands abroad evoked a sense of nostalgia for their home country. The way the brand is perceived varies depending on the country, though some readers appreciated the companies' efforts to maintain a consistent image and "Japanese atmosphere" internationally. Similar to their feelings about manga, the majority of respondents described a sense of familiarity and reassurance when encountering Japanese brands abroad, as if they were momentarily transported back home. On the other hand, others reported being sort of disappointed at the effects of globalization, feeling that the presence of Japanese brands in foreign cities detracted from the local ambience. Notably, some participants also admitted being unaware of the global reach of Japanese brands, while others said if they happened to see such brands abroad they would mistakenly assume that they had originated overseas and later entered the Japanese market. Overall, while many readers were pleasantly surprised by the expansion of Japanese companies overseas, they felt the need to underline that in comparison the global popularity of manga holds a more personal and endearing significance for them.

The last question of the survey asked readers to state their opinion on encountering people abroad carrying Japanese goods, such as anime or manga merchandise. The answers collected reveal a variety of perspectives. The majority of participants expressed their appreciation for seeing foreigners carrying Japanese merchandise, and said they would be interested in engaging in conversations with foreign fans, possibly even making friends. For some readers, a sense of pride emerges from seeing Japanese culture appreciated abroad. They also noted that the spread of such products reflects Japan's growing cultural influence. For others, this phenomenon not only reinforces national pride but also fosters deeper love for their own country. On a different note, some participants expressed concern about the misrepresentation of Japanese culture, for instance when it is fused with Chinese or Korean elements or based on misconceptions which foreign fans couldn't be aware of. Others observed how people often have Japanese-themed tattoos or clothing, such as T-shirts with *kanji*, without understanding their true meaning. This disconnect sometimes

elicits amusement or curiosity, with some wondering whether people are genuinely interested in Japan or simply drawn to its aesthetic for trends.

3.4. Post-pandemic Shifts and Adaptations.

The Covid-19 pandemic has significantly altered consumer behaviour worldwide, and Japan was no exception. In the first quarter of 2020 alone, Japan's economy shrank at an annual rate of 3.4%, with economic activity declining rapidly during the two-month-long state of emergency.[53] The resulting wave of bankruptcies and rising unemployment rates have hindered economic recovery, a trend seen across the globe. Many businesses closed in the early months of the lockdown, with hospitality, restaurants and retail taking the hardest hit. Consumer expenditure recovered after pandemic restrictions were lifted, and e-commerce, which had already seen a steep surge during the lockdown, boomed further as new smart working practices and reduced opening hours were introduced to obviate the general lack of services.

As reported by countless teachers, psychologists and parents all around the world, before the Covid-19 crisis young people tended to have a more outward-facing and positive mindset. Today, adolescents show a growing sentiment of distrust and hopelessness about their future. The burden of university expenses, and consequent post-graduate hardships of finding employment in the current job market or the situation of the housing market, are significant factors which deter adolescents from entering "adult society", towards which they manifest dissatisfaction. Many people have experienced anxiety, behavioural difficulties or fear states, sleep disorders and irregular eating habits.[54] The current condition of young people in Italy is the natural consequence of the preexisting social situation before the pandemic outbreak, which the emergency has exacerbated. Unrestricted access to information sources of all kinds has made young people around the world overly connected and hyper-dependent on their smartphones. Despite this fact, often used as a one-sided criticism of adolescents, it is perhaps more accurate to say that it wasn't young people who have changed, but rather the landscape of information. Younger people use information channels differently than previous generations, for example, they prefer to use online search engines and social media to stay updated, rather than newspapers and TV. In 2023, only 3% of young people stated to read physical newspapers, although 20.7% read their online versions. Social media has rapidly gained relevance in terms of information circulation, especially Tik Tok, whose user base grew from 28,7% of young people in 2020 to 73,3% in 2023. Furthermore, it should be noted that

[53] HAGHIRIAN, *Japanese Consumers' Behavior: By Age And Gender*, cit., p.22.
[54] Carlo BUZZI, Adolescenza un anno dopo. Le conseguenze della pandemia, in "Istituto IARD", 24 May 2021. https://www.istitutoiard.org/2021/05/24/adolescenza-un-anno-dopo-le-conseguenze-della-pandemia/ 06-12-24

younger generations are more apt to recognize potential *fake news* and be critical of their information sources, more than older generations.[55]

A result of the pandemic has been the increasing desire in younger generations to know new people and explore new cultures. Recent studies conducted in 2022 by Istituto IARD have revealed this sentiment to be attributed to the newfound awareness about the importance of physical contact with other people, as a response to the restrictions the pandemic imposed on everyone.[56] Adolescents have developed an inclination towards travelling abroad, also as a psychological way to escape the confinements of society in recent years. The current generation of teenagers and people in their early twenties has gone through unprecedented times, while being in the part of their existence which should exclusively be dedicated to curiosity, achieving autonomy from their familiar context, and discovering their personal identity.[57] Rather than getting to know the world around them, they have been heavily affected by staying at home with their parents, attending online school, and being removed from community spaces. However, young people have shown great resilience, and through time have adapted to change. As the future consumer base, they have already shaped the media industry and information distribution systems by choosing to approach content in different ways than their predecessors.

In this segment, we will discuss the new global accessibility of Japanese media, by analysing digital manga applications and e-readers, along with streaming platforms and social media, to discover how younger generations consume content online.

3.4.1. The new anime and manga boom through streaming platforms and e-readers.

During the last decade, e-books have solidified their position in the market, thanks to their practicality, availability and inexpensiveness when compared to paper copies. Book return rates continue to grow, and the reader base seems to be shrinking. As mentioned earlier in Chapter 2, this has resulted in the decline of bookstores' revenues, some even filing for bankruptcy. Out of print media, magazines have been registering the hardest impact of the shift from paper to digital content. Up until the turn of the millennium, magazines were the primary media format through which readers accessed manga and discovered new stories, endorsed authors by filling out a form to express their preference and mailing it directly to the publishers, and enjoyed weekly updates from

[55] TUCCI Maurizio, *Adolescenti e futuro*, Istituto IARD, 2023, pp. 1-6.
[56] TUCCI Maurizio, *Adolescenza tra (poche) speranze e (tanti) timori*, Istituto IARD, 2022, pp. 1-5.
[57] Ibid.

their favourite series. Entering the 2000s, however, readers began to prefer waiting for a *tankōbon* release of the series they had grown an interest in, probably as an effect of the economic slump of those years which made buying manga digests instead of in-bulk magazines more cost-effective. Publishers have to circulate between 500.000 to one million copies of a magazine to break even with the printing, binding, transportation expenses and authors and point-of-sale margins.[58] According to the Japan Book Publishers Association (JBPA), the average circulation of Shueisha's *Weekly Shōnen Jump* in 2024 was just above the one million threshold, while other magazines, such as Kōdansha's *Weekly Shōnen Magazine* (週刊少年マガジン) and Shogakukan's *Weekly Shōnen Sunday* (週刊少年サンデー) had a circulation of 320,000 and 130,000 copies, respectively. Furthermore, according to the JBPA data, no magazines dedicated to adult or female audiences (*seinen*, *shōjo* and *josei* manga) managed to reach the one million circulation threshold either, so it's likely that even long-running magazines are currently operating at a loss.[59]

In 2017, print *tankōbon* sales were officially overtaken by their digital counterparts. The period between 2016 and 2017 marked the end of serialization for some long-running manga series in magazines (for instance Kubo Tite's *Bleach* ブリーチ, Yūsei Matsui's *Assasination Classroom* 暗殺教室 and Mashima Hiro's *Fairy Tail* フェアリーテイル) and new titles failed to replace them, 2017 marked the largest drop in *tankōbon* sales in the manga market since 1978.[60] At the beginning of 2023, the All Japan Publishers and Publishers Institute (APJEA) divulged their data on Japan's comic book market size in 2022. The combination of the paper and digital comics market reached 6,770 billion yen, marking a slight revenue increase and setting a new growth record for the fifth year in a row. *Tankōbon* sales amounted to 1,754 billion yen (down 16% compared to the previous year), and comics magazines generated 537 billion yen in revenues (also down 3,8%). The progressive easing of restrictive measures introduced during the Covid-19 emergency deescalated demand, although sales still remained higher than pre-pandemic levels in 2019. All the while, digital comics reached 4,479 billion yen, marking an 8,9% year-on-year increase, and accounting for 66,2% of the overall manga market in 2022. These sales figures take into consideration subscription-based manga reading services, but exclude advertising and digital libraries revenues.[61]

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[58] NAKANO, *Dejitaruhatsu 'SPY×FAMILY ' mega hitto no shōgeki…,* cit.

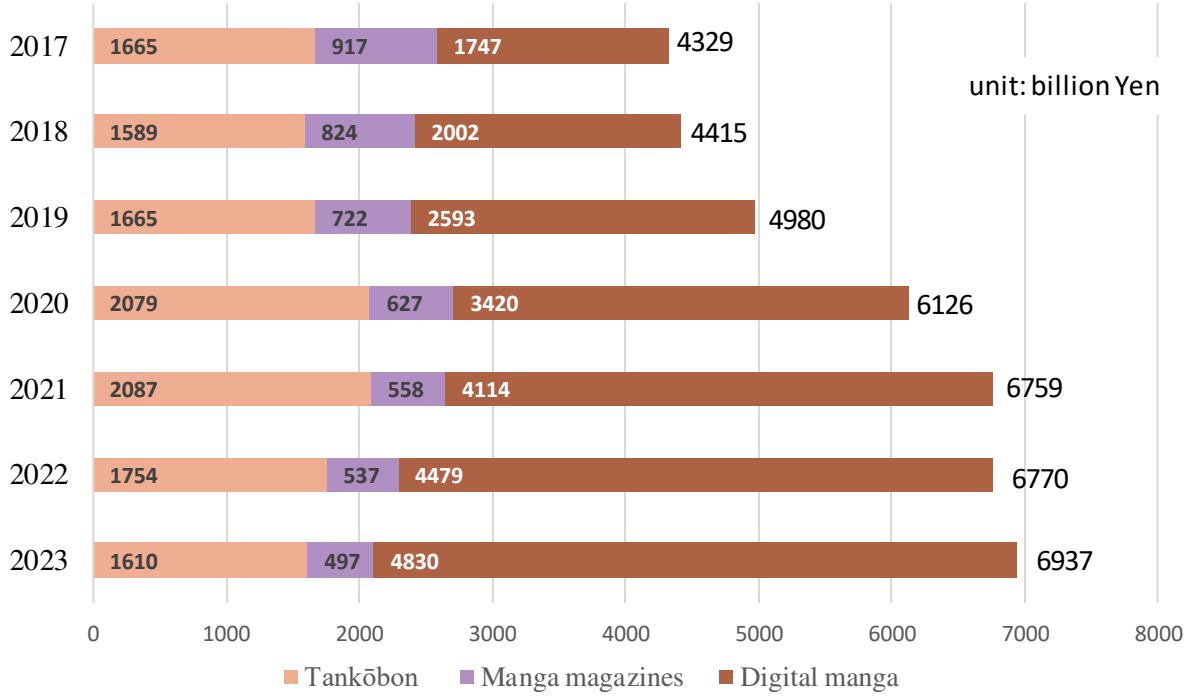
[59] Ibid.

[60] ANDO Kenji, "Manga tankōbon no ureyuki, kako saidai no ochikomi. Riyū wa, denshiban dakede wa nakatta." (Sales of manga books have fallen to their biggest ever low, and the reason for this is not just digital editions.), *The Huffington Post*, 26-02-18

[61] TAKANO Ryō, "2022 nen komikku shijō wa 6770 oku en zennenhi 0.2 pāsentozō de bizōnagara 5 nen renzoku seichō de kako saidai o kōshin – shuppan kagaku kenkyūjo shirabe" (Comic market to reach 677 billion yen in 2022, up 0.2% from previous year, marking fifth consecutive year of growth and reaching a new record high - Publishing Science Research Institute), *HON.jp,* 24-2-23.

This positive trend continued in 2023: according to recent research on the Japanese manga market, digital comics sales amounted to 4,830 billion yen, a 7,8% year-on-year increase. Although the manga market continued to expand to 6,927 billion yen, *tankōbon* and magazine sales continued the downward trend, respectively at negative 8,2% and negative 7,4%.[62] Figure 3.3 shows sales data from 2017 to 2023 collected by APJEA, where it's easy to see the rapid growth of manga e-reader platforms to the point of overtaking *tankōbon* sales, and its disproportion compared to traditional print manga.

Figure 3.3: Manga market revenues from 2017 to 2023. Soruce: APJEA, HON.jp, Nippon.com



It's evident how digital manga sales have exponentially increased since the beginning of the emergency, nearly doubling pre-pandemic figures. On the other hand, magazine revenues have significantly decreased over six years. While *tankōbon* sales have remained relatively stable, they were influenced by the increase in online manga distribution from 2020 onward, which led readers to purchase print versions.

In 2014 Shueisha launched the free mobile application and website "Shōnen Jump+", which allows users to access for free about 100 titles of Shueisha's catalogue at least once. Additionally, in Japan each week the digital version of the *Weekly Shōnen Jump* magazine is made available to read

[62] Nippon no komikku shijō: 2023 nen no hanbaigaku wa kako saikō no 6937 oku en, shuppan shijō zentai no 4 wari ijō. (Japan Comic Sales Reach Record High of ¥693 Billion in 2023), *Nippon.com*, 19-03-24.

through the app. Outside of Japan, the service is called "Manga Plus" and was launched in 2019. Through the app, users can read each ongoing or concluded series' first and latest three chapters available for free, which is a great way to get readers hooked on a story, then they are allowed to read all other chapters only once before having to pay for a subscription.

Following the application's success, many others were created in the next years. Notably, the decision to distribute manga through highly accessible online channels has helped to combat the phenomenon of manga piracy which has been plaguing the industry for decades. Publishers have not abandoned print magazines, however, as they can rely on the substantial portion of income generated by print digests, anime and movie adaptations and intellectual property copyrighting deals. Moreover, major Japanese publishing companies have not been refractory to manga's international success and the revenues of overseas licensing.



The Shōnen Jump+ smartphone home page. (© Shūeisha)

Despite the rapid growth of online media and e-readers, an equally significant market trend has been emerging among younger consumers: they increasingly demonstrate a preference for physical products over their digital counterparts. This change has been registered across various media industries, including music, where vinyl records have abruptly resurged in popularity; film, with a renewed interest in DVDs; and ultimately publishing, which has experienced a rise in printed book sales in Europe.[63] This cultural phenomenon, which I would like to refer to as the "return to analog", might not simply be a passing trend, but rather a reflection of the social alienation that many young people have experienced recently. Rapid technological advancements, the proliferation of artificial intelligence, streaming services, pervasive advertising, social media, and the lingering effects of the pandemic have collectively fostered a longing for tangible and authentic experiences among younger demographics.

As mentioned earlier, over the past decade Millennials (born between 1981 and 1996), Generation Z (1997-2010) and Generation Alpha (2011-2024)[64] have gone through profound societal shifts that

[63] Elisa BULETTI, *Perché la Gen Z preferisce i libri stampati? Il caso londinese della Folio Society*, in "Giornale della Libreria", 22 October 2024. https://www.giornaledellalibreria.it/news-lettura-perche-la-gen-z-preferisce-i-libri-stampati-il-caso-londinese-della-folio-society-6217.html 09-11-24

[64] *Age Range by Generation*, in "Beresford Research", https://www.beresfordresearch.com/age-range-by-generation/ 10-11-24

have plausibly reshaped their outlook on culture. In an era characterized by relentless technological innovation, where previously long-standing certainties seem to crumble, the social and cultural dynamics of the 2020s mirror the sense of decline that characterised the 1920s a century prior. To prove the significance of this sentiment, in 2023 approximately 80% of books purchased by the 14-25 age group in the United Kingdom were in print format.[65] In the case of novels, although digital formats such as audiobooks and e-books have also considerably grown, their sales figures in Europe remain far below those of print books, reiterating the enduring appeal of physical media.

On the matter of streaming platforms, as many have noticed, in the past few years they have been growing in number, and each acquiring licenses to different TV series, dramas, movies, etc. in addition to distributing content from various studios, many platforms actively engage in self-productions or cooperate with other parties to create new content. One of the best-received productions of recent years was Netflix's 2023 live-action adaptation of Oda Eichirō's *One Piece*, so much so that after the highly anticipated first season aired, another two were announced, along with a complete remake of the anime series produced by Netflix titled "*The One Piece*", coming this year. The Euro-American film and TV industries have been turning to Japanese media for inspiration for a long time, especially manga and its franchise. This could be attributed to the progressive decline of American cultural dominance over the rest of the world, which created space for Japan's media industries to expand their soft power even further.[66] In fact, countless anime adaptations of popular manga series were licensed for distribution on foreign streaming platforms, some even co-produced by such services, given their large assets. Japan's entertainment industries have quickly adapted to the public's demands of mass cultural production: famous anime studios have begun to employ animators, background artists and production managers from abroad, creating new job opportunities for creatives around the world while helping to address the notorious issue of over-demanding work schedules for Japanese animators.

As discussed in Chapter 2, in recent years the manga industry in Japan has battled pirated manga and anime markets. Today, almost as quickly as an anime series' episode airs on television or a streaming platform, or a new manga chapter is published, pirated versions are uploaded on illegal websites. The current hyper-accessibility of content brings fans to believe they have control over consuming products in their most authentical form, while minimizing the costs of buying paper material in bookstores or paying for a streaming service subscription. The large number of illegal

[65] *Books vs BookTok: Understanding the reading habits of young adults*, in "Nielsen Book Data", 2023, https://nielsenbook.co.uk/books-vs-booktok-understanding-the-reading-habits-of-young-adults/ 07-12-24
[66] BERTOLINI, *The Soft Power of Hello Kitty*, cit.

online services available over official streaming platforms (Netflix, Crunchyroll, and Prime Video) in the U.S. suggests that the issue of content piracy is not solely a matter of pricing, but has to do with the quality of service provided too. According to fans in online communities, the key issue is that, paradoxically, legal websites sometimes fall short in meeting users' expectations if compared to illegal alternatives. Official platforms often lack features that enhance user engagement, such as release date notifications, customizable watchlists, and user-friendly tools like the 'skip intro' and 'continue watching' buttons. Perhaps most notably, legal services miss the opportunity to stimulate community interaction. Unlike unofficial platforms, which include comment sections and other social features, official platforms rarely provide spaces for fans to interact with one another and discuss content. These shortcomings point out areas where legal streaming services could improve to better welcome their audience's requests not only to compete with user-centric services offered elsewhere, but also to undermine piracy. In a conflicting view, illegal streaming platforms operate in a more competitive environment without detaining a monopoly on intellectual property. Unlike many legal platforms, which hold exclusive licensing rights to certain shows, these illegal websites are part of a closed inner circle, as they provide the same content as their competitors. So, they are forced to differentiate and gain an audience only through superior features. This dynamic creates a more consumer-focused, albeit illegal, market which is paid for solely by advertising revenues, and contrasts sharply with the monopolistic practices of mainstream platforms. Legal streaming services, on the contrary, could hinder content availability due to the fact that sometimes licensing rights for different seasons of the same show are split across multiple platforms. This not only limits accessibility, but can also lead to quality inconsistency cases, depending on the user's subscription tier. To summarise, monopolising intellectual property allows multinationals to maintain their relevance in the media market without prioritizing user experience, as seen with Netflix, which has unilaterally decided to raise prices without giving the users an option for debating in recent years. While legal platforms validate their prices through exclusivity and cross-platform access (for example by offering Smart TV applications) their financial gain often comes at the expense of customer satisfaction, not to mention the numerous problems and scandals related to creators' retribution that took place in recent years. Nonetheless, legal streaming platforms that produce their own shows have the resources to provide high-quality attributes such as professional dubbing and subtitling, which improve the viewing experience for international audiences too. Additionally, it's important to note that while fans frequently criticize the quality of these adaptations, they simultaneously contribute to the financial challenges faced by studios and producers through the use of illegal services with no repercussions. Part of the problem is the complexity of international copyright regulations, as it can create bidding wars over licensing agreements and adaptation rights

for many original series, especially those of the Japanese media industry, which tend to be very fragmented to begin with. For instance, anime shows of medium success are typically the TV adaptation of ongoing manga series, therefore they follow the original content release schedule, resulting in shows having many seasons, some of which have "filler episodes" to be able to distribute the story while waiting for the manga to catch up. However, in foreign distribution of anime through streaming platforms, all episodes of a specific season are released in bulk, causing fans to have to wait months or even years for new content. As viewer's interests are fickle, and streaming platforms prioritize financial gain over consumers' satisfaction, anime licensing rights can be sold to different parties depending on the time of release. This has pushed fans towards illegal services, to avoid incurring in the payment of multiple subscriptions for a singular show. Interestingly, Crunchyroll, which is now the main legal streaming service for anime and drama, started as an illegal platform before transitioning to legitimacy.[67] As a result, many have questioned whether the change to a corporate model has been made by devaluing the interests of the original user base, to prioritize economic returns instead. Although legal streaming services offer many advantages, on a cultural level, many fans manifest a sentiment of abandonment, as they feel exploited by corporations, and state that a sense of community has been lost in regard to Japanese media consumption.

3.4.2. Social media's global influence on reading habits.

Social media exerts an increasingly significant influence on the publishing industry, serving as a vital tool for content promotion employed not only by publishers, but also by authors themselves. For emerging authors, self-promotion on these platforms has become a necessary strategy to demonstrate market potential to agents, while established authors rely on it to maintain their relevance and visibility in an oversaturated market. This shift has, in many ways, transformed authors from exclusively being creators of art, to becoming the primary patrons of their own work.

In a society where attention itself has become a monetized commodity, and the primary goal of content creation is to sustain and capitalize on that attention, the perceived value of a work is determined by its capacity to generate economic returns. Within this framework, self-promotion on social media mitigates costs traditionally linked with talent scouting while economically quantifying the notoriety surrounding an author and their work, thereby reducing the potential risks of embarking on unprofitable investments. Public interest, seen through metrics such as follower

[67] *Crunchyroll*, in "Wikipedia.org", https://en.wikipedia.org/wiki/Crunchyroll#:~:text=Crunchyroll%20was%20first%20launched%20in,had%20been%20subtitled%20by%20fans. 09-02-25

count, likes, and shares, often serves as a preliminary indicator of a work's market potential, even before it is released. In the current market, the popularity of an author, or their appropriate alignment with contemporary subcultural trends can significantly influence a book's success, reiterating the motto that 'all publicity is good publicity'.

Since 2017, sales in the publishing industry have shown steady growth, driven in part by the influence of social media platforms, particularly TikTok and Instagram, which have fostered a rising appreciation for craftsmanship. Joanna Reynolds, Chief Executive since 2016 of the British independent publishing house "Folio Society", described the company's prior challenges to The Guardian by stating that the editorial business in Europe had been suffering great financial losses even before the pandemic, which only exacerbated after 2020.[68] Within publishing specifically, the emergence of platforms like TikTok have profoundly impacted the industry, both positively and negatively. Since the early 2020s, the rise of "*BookTok*", a community dedicated to books and literary discussions on TikTok including recommendations and reviews, has demonstrated the power of social media to shape public discourse, amplify trends, and change consumer behaviour. In the UK, readers under the age of 25 currently represent a market share comparable to that of readers over 65.[69] On a global scale, "*BookTok"* has emerged as a significant promotional tool within the publishing market. Since Millennials and Generation Z have started to reach financial independence, these demographic groups are increasingly willing to invest in high-quality, well-crafted products, even if they're released at higher costs.

Social media platforms may play an increasingly significant role in transforming the European publishing industry in the future. This year, ByteDance (TikTok's parent company) is expected to strengthen its market presence through a new publishing initiative, 8th Note Press, in collaboration with independent publishers. This venture is borne from the extraordinary success of the "*BookTok"* sub-community. As of October 2024, print sales for authors with substantial followings on the app, such as Colleen Hoover, Sarah J. Maas, Freida McFadden, and Rebecca Yarros, have reached 41 million copies, reflecting a 23% year-over-year increase[70], as mirrored in foreign fiction sales charts aforementioned in Chapter 1.

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[68] Rachel HEALY, *TikTok meets Tolkien: how the Folio Society attracted gen Z readers*, in "The Guardian", 8 September 2024, https://www.theguardian.com/books/article/2024/sep/08/tiktok-meets-tolkien-how-the-folio-society-attracted-gen-z-readers

[69] Ibid.

[70] Alexandra ALTER, *TikToks Owner Already Publishes Digital Books. Now It Is Moving Into Print.*, in "The New York Times", 16 October 2024 https://www.nytimes.com/2024/10/16/books/tiktok-bytedance-8th-note-press-print.html

Moreover, in recent years TikTok and other social media platforms have emerged as vital tools for publishers and authors seeking to engage younger audiences, driving significant sales and readership. ByteDance's entry into the publishing domain could disrupt traditional publishing models, positioning 8th Note Press as a serious competitor to established publishers. The platform's ability to leverage its algorithm and amplify the visibility of its authors has the potential to generate viral literary successes, further consolidating its influence in the global book market.

Conclusions.

This research paper aimed to define the role of manga in the evolution of the Italian and Japanese publishing industries, as well as the cultural and sociological implications of their recent international popularity, particularly from the beginning of the decade to the present day. The primary objective of the study was to answer the question: “How have manga transformed the Italian and Japanese publishing industries in recent years, and what is its cultural influence on younger generations?”.

In this regard, the thesis illustrates how manga are a fundamental element in fuelling the entire Japanese media industry, as they constitute the foundation from which numerous franchises originate. Additionally, the paper examines the fluctuations in both markets, the works that have registered the highest profits, and the changes that Japanese literary products have brought about on a global scale. From a cultural perspective, by analysing the last five years, it becomes evident that manga have served as a source of emotional support, escapism, and identification for readers. Moreover, they have become a significant psychological anchor during the pandemic, not only for the millions of people who began reading them in recent years, but also for the global community of fans in unprecedented, highly unpredictable times.

Manga have deeply influenced the Italian comic book market in recent years. They have generated great profits which reshaped the current supply available in bookstores, thereby contributing to their revitalization. The global popularity Japanese authors' works not only elevated manga, but also brought attention to literary works from other Asian nations. Additionally, over the past five years, manga has not only revitalised but also expanded the Italian comic book market, redefining the very idea of comic books in the eyes of Italian readers. Furthermore, this thesis presents a historical vision of the development of manga within the Italian market first, before focusing on the recent period and providing a perspective of the industry as up-to-date as possible. Similarly, an introduction to the Japanese industry has also been provided, to discuss its distribution channels and the importance of the relationships between Japan’s different media industries. The focus then shifts to the current state of the manga market, with an in-depth analysis of the challenges the industry is facing, particularly the global issue of piracy. In regards to the broader social effects, after

discussing the Japanese cultural self-promotion strategies, it has been proved how manga has become an ambassador of Japan in the world and, as such, has been successfully employed as a diplomatic tool by the government, thereby shaping the perception of Japan and its culture abroad. After this, by presenting the results of the surveys conducted with both Italian and Japanese readers, it has been proved that younger generations are avid consumers of manga and other Japanese media. The forced isolation during the pandemic induced people to explore new hobbies and interests, suddenly free from society's judgement and long-standing stereotypes associated with manga, anime and drama consumption. As a result, media industries all around the world quickly responded to this surge in interest in Japan, promoting content of various kinds (streaming platforms, manga app subscriptions, etc.) and making it incredibly more accessible than it was before the pandemic. Ultimately, this thesis has proved how, until a decade ago, manga consumption was limited to a niche of fans, but today it has officially become a mainstream media. In preparing this work, extensive research was conducted on the latest market data, while monitoring consistently the insights from year-end reports by institutions and government officials, as well as the related coverage from various news outlets. As a result, one of the strengths of this work lies in its timeliness and relevance.

Of course, some aspects could be explored in greater detail. This thesis provides a broad overview of the workings of the Italian and Japanese publishing industries, offering only an introductory look at the internal mechanics of the Italian publishing industry rather than a comprehensive analysis. It focuses primarily on the current state of the comic book market and only touches marginally on foreign literature, to put emphasis on the works of Japanese authors. Regarding the Japanese publishing industry, certain topics were only briefly addressed, such as the legislative landscape and the publishing sector's relationship with other entertainment industries. This was to guide the attention on manga market trends, leaving aside broader literary discussions. Undoubtedly, more detailed and comprehensive insights into the industry's mechanisms could be obtained by conducting direct interviews with sector experts. Based on the methodology of the surveys conducted with both Italian and Japanese readers, future research could involve more in-depth investigations.

Although it is impossible to gain a clear and complete understanding of the current dynamics of the comic book market in both Italy and Japan, given the vast amount of information available and its constant evolution due to close interconnections with other media industries, this final section is set to explore potential future developments within these respective industries.

Taking into consideration the publishing industries analyzed throughout this research paper, I believe it is fair to conclude that each digital market will continue to expand, albeit not at the staggering rates seen during the pandemic. However, I do not think this market expansion will occur through the creation of new channels for accessing media content, but rather through the growth of already existing ones. I agree with other researchers that a monopoly on publishing products would be detrimental not only to the industry itself but also to the public. As for the Japanese publishing industry, I consider crucial governmental and corporate efforts to sustain physical bookstores. In addition to this, I also believe that the manga magazine market requires timely interventions to prevent it from being entirely replaced by digital formats, especially given its historical and cultural value and its pivotal role in popularising manga globally. That said, the Japanese publishing industry has consistently proven to be highly adaptable and responsive (more so than in other countries) to the readers' preferences and behaviours, which remain the driving force of the entire industry.

In conclusion, this thesis was produced to discover the global impact of Japanese literary products, and through this research, it has been demonstrated how manga has not only been fuelling all other entertainment industries for decades, but has also effectively shaped the image of Japan in the world.

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