

“Make-in-Vietnam” Cartoons: A Hidden Kingdom

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ABSTRACT

Vietnam cartoon industry has gradually shifted from a central-planned marketplace to a market economy model. With the recent radical change to cyberspace due to the Covid-19 pandemic and the emerging “make-in-Vietnam” cartoon wave, this paper aims to capture the market situation, giving a holistic view of the transformation over time. By conducting an integrated observation, literature review, and comparative case studies, the paper hopes to contribute to the “make-in-Vietnam” cartoon’s research body while incorporating a platform for future market analysis post-Covid-19 period. Besides, hardships such as a lack of good script, budget, personnel, and changing customers’ preferences are analyzed. While there has been an undeniable leap in the market lately, research on this matter is relatively limited. Furthermore, it is hard for authors to collect quantitative data through calculated resources such as market reports, industry highlights, etc. However, the paper also tries to spell out recommendations provided to industry experts and inside players.

Keywords: *Make-in-Vietnam, cartoon industry, Covid 19, digital orientation.*

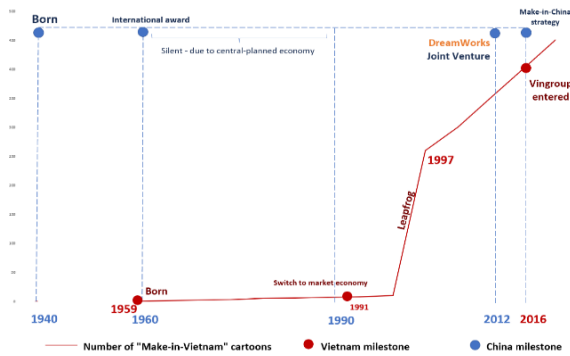
1. INTRODUCTION

Cartoon is a familiar form of entertainment and has grown with people since childhood. Generations worldwide grew up with the cartoon, including Vietnamese people. In addition, there has been a substantial influx of comics from other countries coming to Vietnam [1]. People love cartoons, not just young minds, but individuals of different age groups. In recent years, the spur of the Internet and social distancing by Covid 19 enticed more and more people to find cartoons as their form of entertainment [2]. This trend is affiliated with the growth of locally produced comics, known as “make-in-Vietnam” cartoons. The kingdom is called “make-in-Vietnam” instead of “made-in-Vietnam.” [3]. According to the Ministry of Information and Communication of Vietnam, this slogan hides a special message. “Make-in-Vietnam” is an expression to emphasize the initiative in creating and designing high-tech products by Vietnamese. Therefore, businesses will have to increase design quantity and quality, which requires more creativity [3]. In this way, Vietnam hopes to mobilize intelligence and add value to the animation process instead of mere processing and assembling. It shows a committed effort of the government to promote the domestic Information Communication Technology industry [3]. To facilitate a better

understanding of the current “make-in-Vietnam” cartoon industry, the authors would like to elaborate on the development of the industry in chronological order.

2. HISTORY OF “MAKE-IN-VIETNAM” ANIMATIONS

According to Lent (2004) [4], Vietnam is the grandparent of Southeast Asian animation. The Vietnam cartoon industry dated back to 1959. After the end of Vietnam War and the shift to market economy, studios started to make more cartoons. In 2011, the government pushed the production of cartoons through Vietnam Animation Company, a governmentally owned company [5]. A firm grip of the government did little to stimulate the supply side of the cartoon industry. Evidently, following the divestment movement of inefficient state-owned firms in 2017 [6], the government sold its share in Vietnam Animation Company. However, the State players still hold ownership of the firm with 51 percent shares and maintain the long-standing production model. The rigid regime with quota production, 16 cartoons (10 minutes each) to promote free broadcasting, led to a meager production volume, thus discouraging broadcasters.



Source: Author's illustration from Lent (2004) [4], VTV (2018), Bao Anh (2018) [7], Shackleton (2019)[8]

Figure 1. Comparison between development of China and Vietnam cartoon industry

The cartoon industry of the country has indeed received a positive signal in 2016, when Vingroup, a Vietnamese conglomerate, has entered the industry and given it a tremendous boost. Vingroup is one of Asia's largest multi-industry private groups with nearly 16 billion US dollars [9]. By the end of 2016, Vingroup launched VinTaTa, its animation business. There are two studios in Hanoi and Ho Chi Minh City. They are equipped with hardware and software systems used in major studios around the world. VinTaTa currently has more than 100 employees who are prominent faces of the Vietnamese animation industry [10]. The company aims to produce "make-in-Vietnam" cartoons for the international market. VinTaTa has launched its testing products [11]. "Monta in the Ridiculous Galaxy" is the first official series cartoon of the company, gaining records of animated graphics in Vietnam.

The appearance of big-name with solid financial capabilities has given the "make-in-Vietnam" cartoon industry a healthy boost. The authors would like to draw a short comparison between Vietnam and China, with a deep-rooted animation industry. Furthermore, Vietnam and China are similar in culture and political sphere. The cartoons were first shown up in 1940 in China, twenty years before Vietnam [8]. In 1959, when Vietnam Animation Company introduced Vietnam's first cartoon, China has made international recognition already. However, the two experienced a sluggish period due to a governmental-planned economy for roughly 30 years. The cartoon industry in China truly transformed in 2012 when DreamWorks Animation, a world-renowned American studio, entered the Chinese market via a joint venture. After this point, China has become a manufacturing hotspot. However, until

2016, the government strategy aimed for locally made cartoons. It was somewhat similar to Vietnam, where Vingroup, a Vietnamese conglomerate, instead of a world-class animation studio, entered the market in 2016. The compelling rationale is that both countries got a healthy dose of cash, thus marking a new industry era. A look at Figure 1 will furnish the comparison.

3. IN-DEPTH ANALYSIS

Even though the "make-in-Vietnam" cartoon industry has a 60-year history, Vietnam has yet made any cartoon for the big screen. Therefore, the authors wish to analyze core pillars of the industry, namely *financial, content, labor, and viewers' characteristics*, for better understanding. From such ground, the authors can illustrate the opportunities and challenges of the industry.

3.1. Budget

The "make-in-Vietnam" cartoon industry is broadly scattered. Apart from big names such as government-owned Vietnam Animation Company and conglomerate-backed VinTaTa, most of the player landscape are small studios. These small studios encountered several setbacks financially. One of the most passionate studios is Minh Do film. In 2007, Minh Do film sought American investment for their long-cherished project *Diary of a Cricket* (De men phieu luu ky). They gained approval for a 1-million USD investment package. However, after careful market research, the project was canceled because revenue could hardly cover production costs. In 2007, viewers did not willingly spend too much to watch local cartoons [12]. Vietnam Cartoon Company produced, on average, ten films per year. However, public television broadcasted them only once or twice. Broadcasters were also not interested in Vietnamese cartoons. As a result, Vietnamese cartoons are showcased only twice per year [5]. The government inevitably sponsors these cartoons, though the amount was humble. Hence, other small studios wishing to penetrate the domestic market would not see much of a profitable outcome. The internationalization of "make-in-Vietnam" cartoons, unquestionably, would require multilateral efforts [1]

Other cartoonists share a different viewpoint. Director Khai Hung acknowledged the financial side of the industry. However, he believed that economic matters should come second, after a quality. "It must be derived from genuine feelings for them, to see the way children see. How can one make a good product

that children love if one only thinks of profit?" [7]. Another instance is Monster Box, a Youtube channel broadcasting "make-in-Vietnam" cartoons, focusing on delivering scientific knowledge in a vivid and easy-to-understand approach. The channel has English subtitles, thus gaining viewers in Vietnam and internationally. Monster Box owned 15 videos as of 2019, making... 150 USD from Youtube. Monster Box founders shared the same philosophy as Director Khai Hung. Money value is not their primary focus. Making quality products and building a platform on such grounds would benefit better in the long run [13].

However, we should stay critical that Vietnamese cartoons still need a balance between budget and quality. Many small studios have not had the resources compared to giants VinTaTa. Bao Anh (2018) [7] noted that the financial limitation did not allow the studio to hire as many illustrators as they wished nor invest in new equipment. For example, VinTaTa had to produce 7,200 drawings per week for six consecutive months to produce *Monta in the Ridiculous Galaxy*. Artists of VinTaTa would only pick one out of six drawing for every frame, dropping unsatisfying drawings quickly. An artist in Vietnam Animation Company shared that "We cannot even draw many illustrations, not to mention dropping a drawing. If we discontinue a drawing, we won't have money to start it over." Thus, if no financial support were given, the journey of the locally made cartoons would likely stagnate. The investment used in VinTaTa is also calculated. VinTaTa will demo animation themes for Vingroup amusement parks, which are expected to follow Disneyland and Universal models [10]. In fact, the Vietnam cartoons industry was most dependent on external financial support [14]. Thus, financial inadequacy can be considered one barrier the industry must overcome.

3.2. Script

Relatively, Vietnam has been through wars with a lack of enjoyment and a customer-focused mindset. After turning to the market economy, the country has become a manufacturing hotspot for other countries. Therefore, the process of creating intellectual property hardly takes place. The industry is calling for due and dedicated investment in scriptwriting. Screenwriter teams need to be the top concern. "Make-in-Vietnam" cartoons essentially need a "makeover" of the script, offering profound content and breath of the times [1]. Vietnam Animation Company had hosted annual intensive animation

camps. Fifteen authors joined each camp, selecting from 150 proposals submitted for registration. The authors joining the camp did write their scripts and the camp's training to create a source of screenwriters to write scripts for Animation Studios. Editors had been sent to accompany the authors during the camp. As a result, 80 to 100% of the scripts written at the camp are then checked and edited [15].

Vietnam Animation Company has diligently held animation camps from 2009 until 2018 [15][16]. It shows a consistent effort of the governmental agency to address the problem. However, the shortcomings of these camps still exist. *First*, the question of attracting qualified campers is still debatable. Chiming in their schedules a considerable chunk of time to take part in the camp might be a luxury for many. Thus, the majority of campers are youngsters or people who happened to have their free time matched. *Second*, the quality of these scripts is still substandard to put into production. Even though organizers welcomed various topics, writers had been swirling around typical cases, lacking depth in their story-telling techniques [16]. The efforts of traditional cartoon industry players seemed to be long-term. However, they did not deliver transforming results. The industry, generally, lacked a substantial push.

Ever since joining the market, Vingroup, similarly, struggled to find a breakthrough script. With substantial financial capabilities, the Vietnamese conglomerate hoped to find a new way to collect qualified writing in a relatively short amount of time. In late 2017, VinTaTa held a crowd-sourced project named "The Famous Writer" [17]. Participants from every corner of the world, aged 7 to 77 years, are welcome to send their ideas for a cartoon series. Submissions had to meet the "double criteria": bringing laughter to children and having high educational significance while imbued with Vietnamese identity, soul, and international stature. The contest offered a lucrative prize: 50,000 USD in cash for the winner and 100,000 USD in the total award [10]. As a result, more than 800 ideas have been registered to participate in this contest from domestic and foreign authors and author groups. It was clear that VinTaTa benefited greatly from this contest. Aside from outstanding ideas, the company successfully built a large bank of scripts, though further adjustments shall be necessary to reproduce those ideas. BBC Kids have recently replicated a similar approach. The prestigious media outlet has called for "fresh, bold, and innovative" ideas in

making cartoons [18]. Such evidence further makes concrete support for Vingroup's ingenious way of making it happen. However, it is noteworthy that the contest focused on cartoon series. The collection of scripts for big-screen cartoons, in turn, has remained largely unexplored. Thus, the development of qualified script in a later stage, when the market matures and turns into cinema, should be considered. Now, cartoons are not limited to young audiences but appeal to the mass population, given a suitable script [19]. However, it should be noted that scripting is always a complex problem, not only in the infancy industry but also in large and famous companies, such as Disney. Furthermore, the production gap and script quality between small, scattered studios in the country and the market leader, VinTaTa, is noticeable. Hence, the industry's competitive landscape is ambiguous.

3.3. Personnel

Undeniably, the "make-in-Vietnam" cartoon industry has made much progress after 60 years of establishment and development. However, Mai An (2021) [20] stated that cartoonists in Vietnam did not dare to make the breakthrough because of government subsidies for the industry. The encouragement to make a breakthrough in Vietnam did not measure up with other neighboring countries. The making of long cartoons required substantial funds and highly qualified teams. Vietnam lacked an excellent pool of animator personnel, contributing to several reasons. The authors shall look to other Southeast Asian countries to better understand the macro environment. Generally, there has been a considerable shortage of animation courses at schools and higher education institutions. Thus, it leads to a smaller pool of talents [14]. Furthermore, due to a lack of institutions providing courses on animation, public awareness and marketing activities have been seldom seen. Malaysia has the highest number of institutions giving animator courses, while Indonesia and the Philippines came close.

Meanwhile, the Thailand government emphasized developing the local cartoon industry by pouring in resources training talents. Thai universities have produced hundreds of animators annually, thus enabling a solid talent supply [21]. In Vietnam, prestigious public schools, such as the Vietnam University of Fine Arts, do not have animation-specific minors. It is quite a dilemma since the cartoon industry is primarily governmental owned. Therefore, the State has significantly overlooked the

personnel. Instead, Vietnam relies on an influx of qualified local animators from private universities, especially institutions that set foot in the field of graphic design. FPT-Arena Multimedia Academy of Fine Arts is a prominent name among these institutions [22]. However, the number of these academies is just a handful. According to the 2018 animation report in South-East Asia countries by MDEC (2018) [14], other names consist of Ho Chi Minh University of Architecture, RMIT-Saigon Campus, and VTC Academy. However, as VinTaTa and other players had stirred up the local landscape since 2016, the focus on training qualified personnel is visible.

Large animation companies and academies have set future goals and thrown out regular workshops to young people who wish to know more about the industry and consider cartoonists as their future career [23]. However, limitations in budgeting refrained producers from paying cartoonists in a way they deserved. Vu (2011) [5] depicted talented cartoonists quitting their jobs because of low pay. Those who chose to stay had to work multiple jobs to feed themselves from hand to mouth. However, after 2016, when the market started to burgeon, the salaries of cartoonists did pump up. Compared with other South-East Asia countries, wages of Vietnamese animators are relatively higher than those of other nations. With an average of around 800 USD per month in 2018, paychecks in Vietnam doubled Thailand's [14]. It could be an attractive aspect for young people studying animation.

However, Vietnam should be cautious in this matter. A surplus of the animation workforce could exploit their income. When Thailand produced more animators, their income did not measure up to Vietnam's [14], given the average income of Thai people is around 180% of the Vietnamese in the given year [24]. Another powerful story could be seen in Japan. Japan has a global reputation in cartoons and anime (a distinctive comics genre originated from Japan). According to Asian Boss (2020) [25], the monthly salary of cartoonists in Japan was around 500 USD in 2019. Considering the high living standards in Japan, Japanese cartoonists are seriously underpaid. Thus, caution should be taken in the future if there should be a surplus in the workforce. However, the Vietnam cartoon industry certainly needs more qualified personnel as of the present state.

3.4. Viewers' characteristics and preferences

As time evolves, the middle-income class in Vietnam has grown. People started to nurture their free time in cinema. Seeing the vast potential, foreign countries began to invest in Vietnam cinema. Mr. Nguyen Van Hai, director of CJ CGV Vietnam, a Korean multinational cinema chain, said: "Vietnam is at a very suitable time to develop the movie market. From juvenile to 34 years old, movie audiences in Vietnam account for 90% market share, especially those under 29 years old account for 80% of the market. The average age of Vietnamese cinema goers is very much younger than other countries in the world. Therefore, the market will grow more and more." [26]. In detail, according to Vinaresearch (2016) [27], people aged 30 and more normally go to the theater with their kids. The cartoon world is not limited to kids only [18]. These are good news for the cartoon industry, which was also people's TOP 4 favorite genre in the Vinaresearch survey (2016) [27]. Looking to Vietnam's neighbor, Thailand had an underrepresented viewers' market. Younghusband (2014) [21] noted the contrasting situation in Thailand: "There just isn't a big enough domestic appetite for animated features. Even the highest-grossing animated movie, *Frozen*, which made over a billion dollars worldwide, took in only \$1.5 million at the box office in Thailand. Some of the biggest *Pixar* movies make a few hundred thousand dollars. In contrast, the highest-grossing live-action features are hitting something in the region of \$10 million. It becomes clear that producing feature animation for the Thai market is a bad bet. It was clear that the nation was not very interested in the cartoon. However, the Thai government still invested heavily in the industry. It speaks to the fact that "make-in-Vietnam" is overlooked and under-simulated. Thanks to the digital shift due to Covid-19, the "make-in-Vietnam" cartoon industry has been re-evaluated and regained public attention. Viet cartoon makers now face viewers' trust [26]. Viewers' belief in "make-in-Vietnam" cartoons certainly takes time to build up. The mushroom of "make-in-Vietnam" cartoon series on the Internet, public television, and paid cable channels should gradually gain several young viewers. The more mature market segment shall be more challenging to attract. In other countries, the situation is similar where the local cartoon industry has just begun to spur in recent years.

The authors shall take the example of China, where culture and viewers' characteristics share many similarities with Vietnam's. Shackleton (2019) [8]

stated that Chinese people have the perception that locally produced cartoons are only suitable for kids. Huayi Wink Animation CEO Joe Aguilar shared: "It takes either strong word of mouth or brilliant marketing to change that perception. That's why it's difficult to get investors on board for bigger-budget productions because the numbers don't play out." In China, cartoon producers look to build cartoon scripts catered to viewers' gender. The survey showed that female viewers watch cartoons more than their male counterparts. Thus, cartoon scripts create storylines with strong female characters or emotional storylines. It is hard to pull male audiences in because these guys are more into games. However, if writers can pull off scripts for these audiences, the boys will drag a whole team of gamers along. To conclude, the challenges of making a one-size-fits-all recipe in the cartoon are substantially high.

4. FUTURE TRENDS AND IMPLICATIONS

4.1. Budget

Even though online channels shall prosper shortly, short films and series online could hardly make ends meet for cartoon producers, as evidence in the case of Monster Box [13]. The authors thus would like to analyze other channels that stream income. First comes public, cable, and paid television, such as FPT Play, Netflix, Viettel TV, or My TV. However, the number of cartoons shown on these channels is quite limited. Moreover, each broadcaster seems to fixate on their cartoon quota annually, as they can rebroadcast the series. Thus, local cartoon makers are quite passive in approaching these stations. Usually, the station will actively order products based on the station's own planning and needs. Therefore, it is necessary to have a comprehensive solution for locally made cartoons to be recognized and appear more on traditional channels.

The cartoon industry in Europe can also imply the situation in Vietnam. The industry has not yet been heavily affected in Europe, but it still sees the consequences of many missed opportunities. Timely financial support was much appreciated, as studios could not pay their bills after the off-peak period in the latter part of 2020 [28]. Along with many other industries heavily affected by Covid 19, the "Make-in-Vietnam" cartoon industry is likely to suffer. A lack of empirical studies body has yet shown an exact degree. However, government support is indeed

necessary. Simultaneously, cartoonists should speed up the learning curve to release works up to theater standards. The income and quality level of cartoon work in cinema is attractive to every producer. To do so, studios should continue to financially support themselves by doing commercial work while investing in a quality, profound script to realize their dreams later. The effects of Covid 19 remained largely unknown. Thus, industry players should be conscious and set their expectations appropriately after the pandemic.

4.2. Script

Shackleton (2019) [8] denoted China's local cartoon industry landscape as lacking script ideas that draw families to the theaters. The family cartoon market in China is perceived as "still immature" and "very competitive." China has gained stable momentum in developing the animation market ever since 1996, almost ten years earlier than Vietnam. What lies ahead with the Chinese animation industry today could potentially be for Vietnam in the future time. The challenge that Chinese animation faces today is changing the perception of viewers. The cartoon's stigma for young kids refrains the industry from getting its most profitable share of the 18 to 24 age bracket. Another aspect that the Vietnam cartoon industry should be on the lookout for. However, Vietnam should be focusing on short movies and series to gain the trust and confidence of viewers. Going big screen is a mission that is hard to shoulder for the industry in the future.

4.3. Personnel

Large enterprises such as Vingroup or Biti's have determined the long-term path with the "Make-in-Vietnam" cartoon. Demand is almost always needed and will grow in the post-Covid time. It takes time to attract and train a personnel force specializing in animation. Given the changing labor market, a career as a cartoonist can provide flexibility [25]. Businesses need to be financially strong to attract candidates, offering above-average salaries and benefits to gain job security. However, this is also on a macro level, involving State's support.

4.4. Customers' characteristics and preferences

Cartoons broadcasting via online channels are also rising in Vietnam, especially locally made ones.

Hai Dang [29] updated recent numbers. Cartoons account for 50.21% of all children's video searches worldwide. According to this report, the three most popular apps used by children in Vietnam are YouTube (28.82%), Zalo (15.67%), and Facebook (15.01%). Under the new normal, people get used to life with new variants, social distancing, and a ban on mass gatherings. There will be a world with equal screen time for theatrical and online platforms. The balance will lean more towards online channels due to the unknown Covid situation; this will be an opportunity for cartoon makers in Vietnam to develop short films and series to meet market demand.

To conclude, cartoons are an indispensable spiritual food for children. The "Make-in-Vietnam" cartoon kingdom has awakened and risen strongly in recent years. Along with the development of society, the target audience of cartoons also expands to groups of young individuals. The development of the "make-in-Vietnam" cartoons also has a special meaning. The stories, cultural values, and the long-standing spirit of the nation are conveyed through the drawings of the Vietnamese people. In the future, with a growing middle-class population, local animation is a fertile field well worth exploring. After graduation, this industry will bring jobs to many young people, studios, educational institutions, and other entertainment services. While other industries in the region, such as China and Thailand, seek to develop abroad and aim to create blockbusters, the direction for cartoons in Vietnam is to be more organic. The kingdom needs to build a strong foundation, covering the whole untapped areas locally before taking its cross-border leap. Coupling with the upward development of Vietnam, the authors also have a hopeful view for the development of this cartoon kingdom.

AUTHORS' CONTRIBUTIONS

All authors designed the study. Hoang Cuu Long worked on the topic, key trends, and revised the paper. Hoang Thi My Duyen collect data and wrote the paper. All authors approved the final version and agreed to be held accountable for the content.

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