

# Anime Industry Report 2017

## Summary

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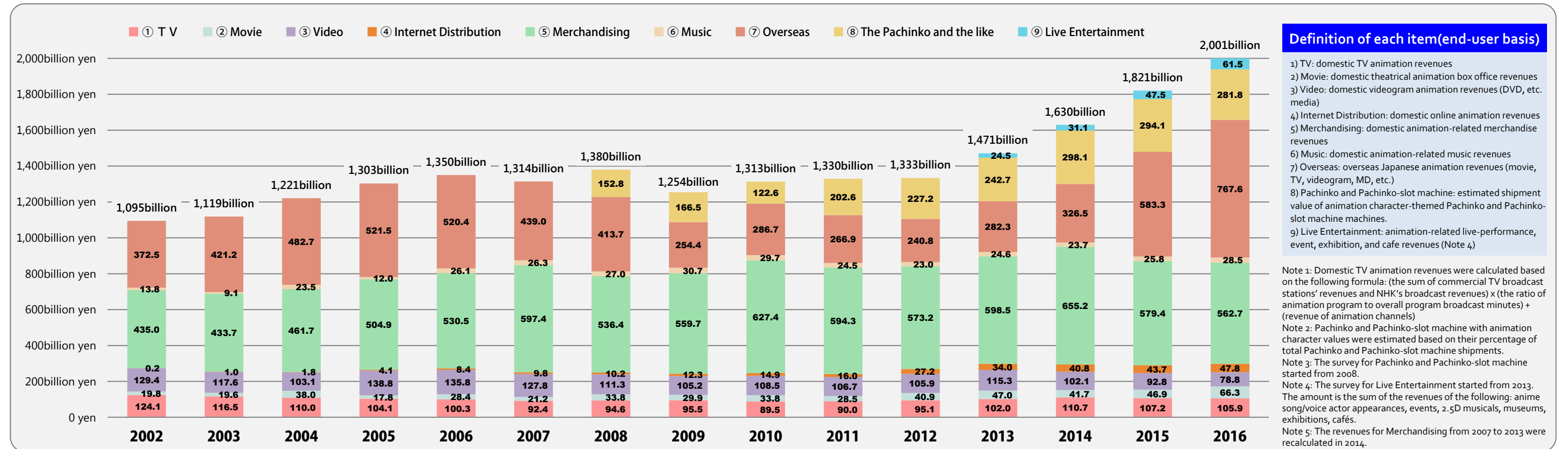
January, 2018

The Association of Japanese Animations

# Trends in Japanese Animation Market (2016 version)

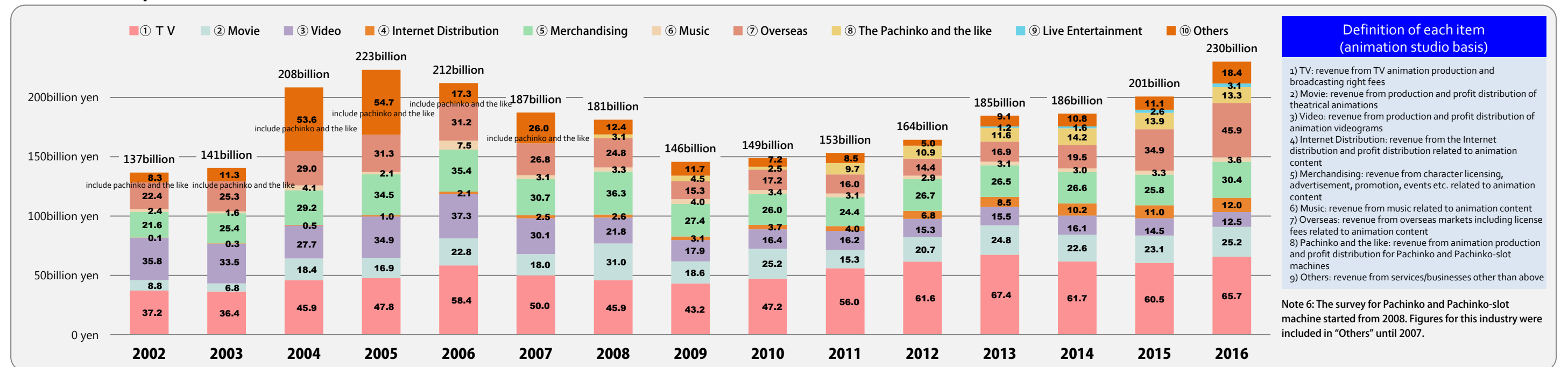
The upper part shows Japanese animation market trends in a broad sense (i.e. market size based on estimated revenues in animation and animation-related product markets). The lower part shows Japanese animation market trends in a more limited sense (i.e. market size based on the estimated revenues of all domestic commercial animation studios). It's obvious that the animation market in a broad sense is overwhelmingly larger than in a limited sense. This is because the animation-related businesses including character merchandising have significant leverage effects.

## Japanese animation market trends in a broad sense (i.e. market size based on estimated revenues in animation and animation-related markets) (2002 – 2016)



Based on questionnaires conducted by the Association of Japanese Animations and other publicly available statistics

## Trends in Japanese animation market in a limited sense (i.e. market size based on the estimated revenues of all domestic commercial animation studios) (2002 – 2016)



Based on questionnaires conducted by the Association of Japanese Animations and statistics released to public.

# The market expanded continuously, recording the highest sales for 4 consecutive years while the size crossed the 2 trillion yen mark driven by overseas sales.

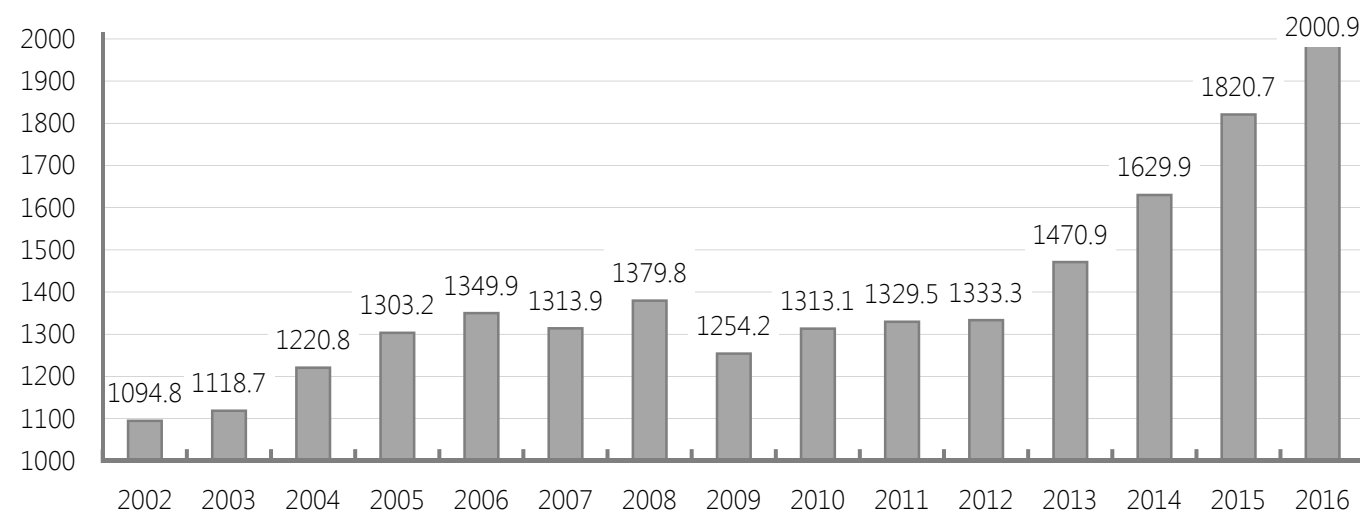
The Japanese animation market, which hit bottom in 2009 and picked up in 2010, recorded growth for 7 consecutive years and reported its highest sales for the fourth consecutive year. The market size finally exceeded 2 trillion yen, which was 110% on a year-by-year basis. Videogram sales shrunk considerably (84.9%), and TV (98.8%), Merchandising (97.1%), and Pachinko (95.8%) also decreased. Meanwhile, Movie (141.4%), Music (110.5%), Internet Distribution (109.4%), Live Entertainment (129.5%) and Overseas (131.6%) expanded. Movie enjoyed strong sales thanks to the blockbuster hit movie "Your Name." Among those, Overseas, which recorded the largest sales, especially stood out.

## Expanding the Japanese Animation Market and Overseas Sales

Recently, the Japanese animation industry has been covered a lot in the mass media, including newspapers and TV, and the data in this report is frequently cited in the coverage. That helps build people's awareness of the industry in some way. In 2016, the industry, which recorded positive growth for four consecutive years, crossed the 2 trillion yen mark when they recorded sales of 2 trillion 900 million yen (109.9% on a year-by-year basis).

Looking at each genre, 5 genres (Movie, Internet Distribution, Music, Overseas and Live Entertainment) increased while 4 genres (TV, Videogram, Merchandising and Pachinko) decreased. The number of increased genres and that of decreased genres are almost the same. The main factors of the growth were Movie, which recorded the highest box office in the animation genre (¥66.3 billion, 141.4% yr/yr), Internet Distribution, which records the highest sales every year (¥47.8 billion, 109.4% yr/yr), and Overseas, which recorded a significant increase (¥767.6 billion, 131.6% yr/yr). Overseas, which took the No.1 place in the previous year, further expanded, leaving Merchandising, the 2nd by a narrow margin in the previous year, far behind. It could be said that the overseas sales supported the overall growth of the industry.

[Figure 1] Revenues of Japanese Animation Industry



Based on the survey conducted by The Association of Japanese Animations

## Topics in the Japanese Animation Industry From 2016 to 2017

### 〈The 4th Anime Boom Without any Felt Benefits〉

As also mentioned in the last report, the animation industry entered the 4th anime boom in terms of sales. The situation, however, was not quite so simple. As shown in Fig.1, the sales amount hit bottom in 2009, picked up in 2010, and has accelerated since 2013. Focusing on the domestic sales trend for the past 4 years, the annual sales remained mostly level, increasing by 3.8% from 2013 (¥1.19 trillion in 2013, ¥1.30 trillion in 2014, ¥1.24 trillion in 2015 and ¥1.23 trillion in 2016). Meanwhile, the overseas sales trend showed a dramatic increase, increasing by 171.9% from 2013 (¥282.3 billion in 2013, ¥326.5 billion in 2014, ¥582.3 billion in 2015 and ¥767.6 billion in 2016). Actually, the growth of the industry was attributed to the overseas market. This was also the reason the industry felt little benefit though the growth reached the level of the 4th animation boom. The stagnation of the domestic market was due to unsuccessful transition of distribution channels; the switch from existing channels shrinking (TV, Videogram, Pachinko, and Merchandising) to new channels growing (Movie\*, Internet Distribution, and Live Entertainment) did not go well. The growth of those new channels was not enough to make up for the decline of the existing channels. (\*Movie, the oldest channel, has grown recently thanks to new business models brought by theatrical digitalization.)

### 〈Video Distribution and Chinese Business〉

The most active movements in the animation business in 2016 would be video distribution and Chinese power.

In terms of video distribution, Netflix and Amazon Prime Video, the two U.S. platforms proactive toward Japanese animations, stood out. Netflix especially attracted attention by announcing its investment in a dozen animation works, including works based on famous Japanese manga, such as "DEVILMAN crybaby", "Baki", and "Saint Seiya" at Netflix Anime Slate 2017. Netflix positively collaborated with major Japanese animation studios such as Toei Animation and Toms Entertainment for those works.

Meanwhile, Hulu, a domestic video distribution platform, was involved in the production of animation works such as "Soutaiseikai", "Enshen to Maho no Tablet", and "Pig - Okanoue no Dam Keeper" (Pig was mainly intended for international distribution). Furthermore, Hulu attracted attention by distributing Infini-T Force via the Internet ahead of TV broadcasting by taking advantage of its position as an affiliate of a major TV station.

Abema TV, a platform co-capitalized by Cyber Agent and TV Asahi, also drew attention with its free video-streaming business model. The platform, sensational not only within the animation industry but

also among all Japanese Internet distribution services, increased subscribers by gaining popularity with its unique programs such as “Kameda Koki ni Kattara 1000 Man!” Even so, the most popular programs among them were animations. The platform made efforts to gain popularity by distributing some animation programs ahead of their TV broadcast; however, there is no doubt its strongest appeal was the free distribution service. It is worth keeping an eye on whether or not Abema TV becomes a threat to existing pay distribution services in Japan.

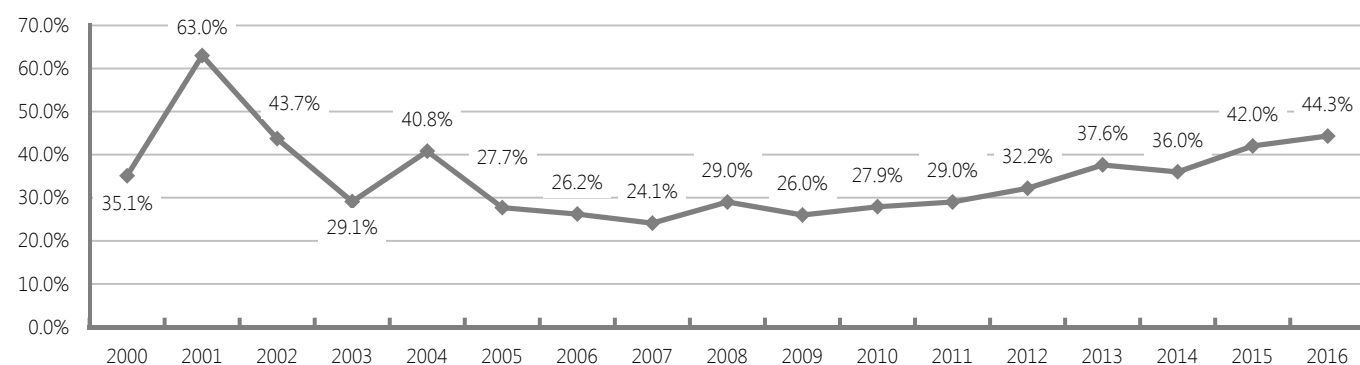
Another topic in 2017 was Chinese power. It was just three to four years ago when China began a shopping spree for Japanese animations for Chinese major platforms. In 2016, some Chinese companies started investing in Japanese animation production committees; furthermore, they began outsourcing animation production for their own IP projects to Japanese studios. Since 2015, the Chinese government has lifted a ban on Japanese theatrical animations, which also had economic spillover effects, boosting overseas sales of Japanese animation.

The Chinese market, however, has a great risk of fluctuation since politics always prevail in China. As can be seen from the past cases, such as the broadcasting ban on foreign animations in 2006 and sanctions against South Korea after the deployment of THAAD, there is a risk of a sudden shrinking of the market due to the political climate. Actually, some are holding off buying Japanese animations in response to a notice requesting to give priority to Chinese IP. We should keep in mind that there is a possibility that the market may return to the size it was before the time of the shopping spree if a full-fledged ban is applied to Internet distribution as has been done to TV broadcasting.

### <Change in Theatrical Animation Trends>

The year 2016 will be remembered as the year movies changed. Thanks to the success of “Shin Godzilla”, “Your Name.”, and “In This Corner of the World” (release date order), manga, anime and special effects, the genres which used to be categorized as “subculture,” emerged prominently. They were no longer “sub”. As seen in Fig. 2, it is obvious that theatrical animations have increased their presence since the 2000s; however, the phenomenon was more prominent in 2016. (The year 2001 stood out due to the release of “Spirited Away”.) Theatrical animations and special effects movies, which were sometimes considered less important, came to be acclaimed. Actually, those three works received 91% of the major domestic film awards: the Japan Academy Awards, Kinema Junpo Best 10, Blue Ribbon Awards\* and Mainichi Film Awards for Best Picture, Best Director and Best Screenplay\* (\*no Best Screenplay for Blue Ribbon Awards). The works also occupied 80% of the awards for staff. It is indeed a notable feat. Animation and special effects, which used to be considered “subculture,” became recognized as mainstream in film culture in 2016.

[Figure 2] Share of Anime Box Office in Overall Japanese Film Box Office



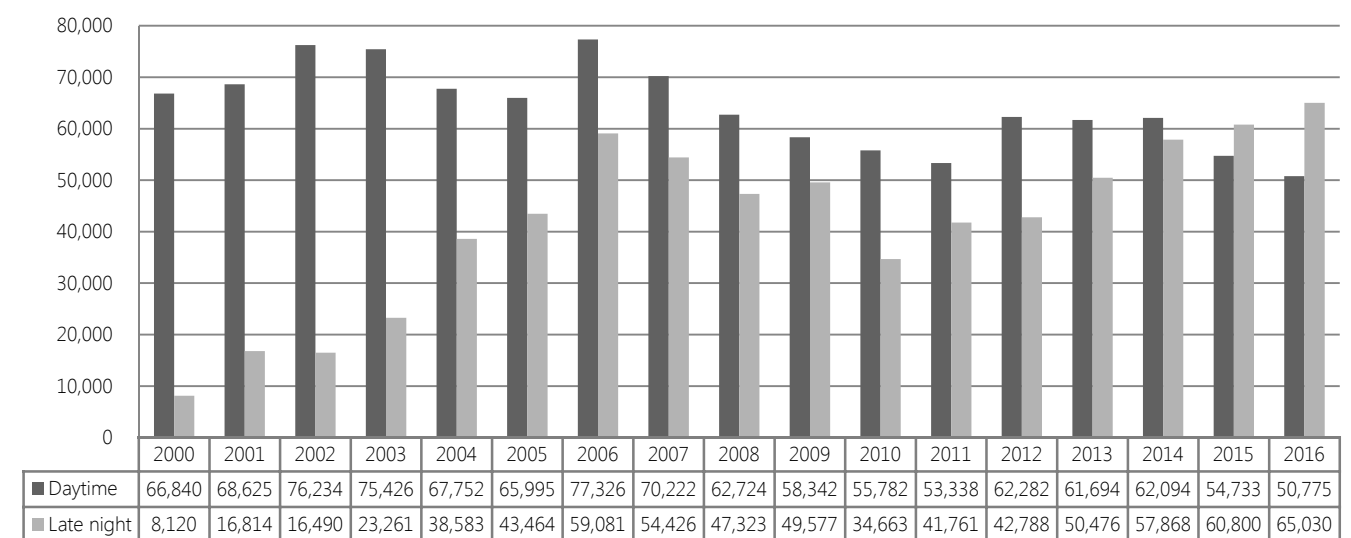
Based on the survey conducted by The Association of Japanese Animations

### <What Production Minutes Indicated: The Main Audience was Adults. Short Animations Emerged>

The share of late-night animations took over that of day-time animations in 2015, and the difference increased in 2016 (Fig. 3). This, as mentioned in the previous report, too, was quite unique in Japan, and was not seen in any other countries where animations aimed at children dominated (or where no animations other than animations for children existed). In 2018, the first OTAKU generation (such as Mr. Toshio Okada) will reach the age of 60, which means a wide range of generations, from babies less than one year old to adults aged 60, watch animations in Japan. In other words, Japan, the leading country in animation, enjoys a monopoly over the adult animation market which can develop much further.

Another feature was the rise of short animations. The number of short animation works increased from 275 to 356 in the last four years while the production minutes remained almost the same (110,000 min-plus. per year in the last 4 years). This was because the number of short animation works within 10 min. increased. The phenomenon, generated thanks to the speeding up of daily life rhythms and the growth of individual digital creators, is expected to continue along with the effect of Internet media, which requires no fixed timeframes.

[Figure 3] Production Minutes of TV animation (daytime/late night)(unit: min.)



Based on the survey conducted by The Association of Japanese Animations  
Note1: Broadcast of MX TV and BS 11 etc. after 21:00 was incorporated into the late-night anime.

### <Driving Force of Anime Business Growth>

Application games developed mainly for smart phones have a great potential to make the animation industry market leap further. “Fate/stay night”, the great hit game/animation series, was developed mainly in the Japanese and Chinese markets while “Dragon Ball Z Dokkan Battle”, also a huge hit, was localized for the Chinese market. The genre of those application games has not been recognized as one independent window as of yet, but it has great potential as a driver of animation business growth like Pachinko (newly established as an independent window in 2008). Although some have concerns about the “chicken or the egg” relationship between anime and those application games, they may need to see them as one unified IP or content. In any case, it’s certain that application games have become more and more important for the animation industry.

# Trends in Japanese Animation Market (2017 version)

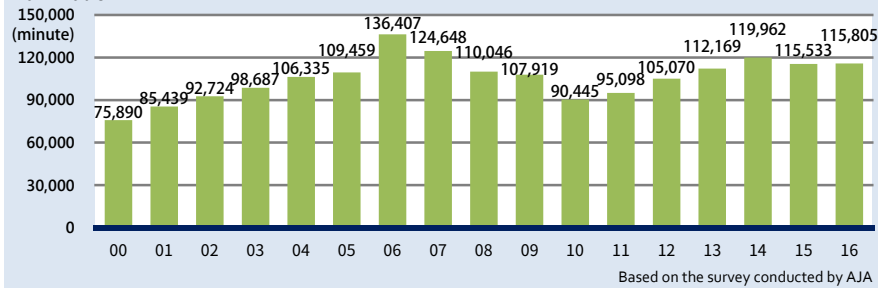
## Structural Transition Along with the 4th Anime Boom

### Production minutes of TV animation (2000-2016)

■ Production minutes of TV animation  
 \*Production minutes of TV animation in 2011 increased as the result of recalculation. \*Production minutes of TV animation in 2011 increased as the result of recalculation.

Production minutes of TV animation remained high.

Production minutes of TV animation broadcasts in 2016 was 115,805 minutes, surpassing 115,533 minutes in 2015. The production minutes have remained high since 2015 thanks to an increase in animation investments from newcomers as well as from existing studios which have positive investment policies. Accordingly, animation production boomed while some problems, such as delays or suspensions in production, occurred. This was because cultivation of staff did not catch up with the demand on-site. Although the demand for new animation works is still high in the market, the current production minutes might be the maximum for Japanese animation studios mainly relying on traditional hand drawn animation.

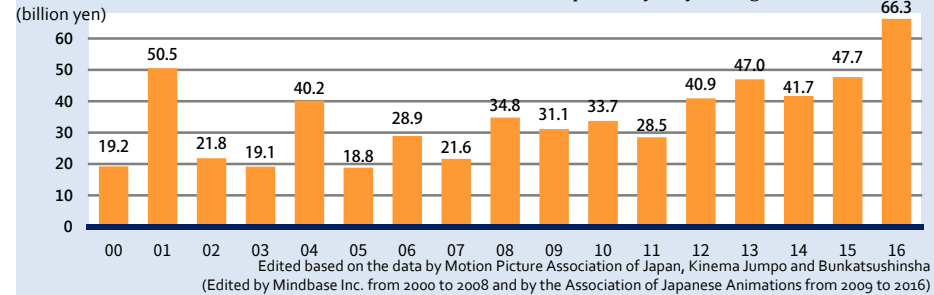


### Box office revenue of theatrical animations (2000-2016)

■ Box office revenue  
 \*All theatrical animations released not only via ordinary distribution routes but also independently are included. \*All theatrical animations released not only via ordinary distribution routes but also independently are included.

"Your Name." exceeded ¥25 billion. Theatrical animations made a big leap.

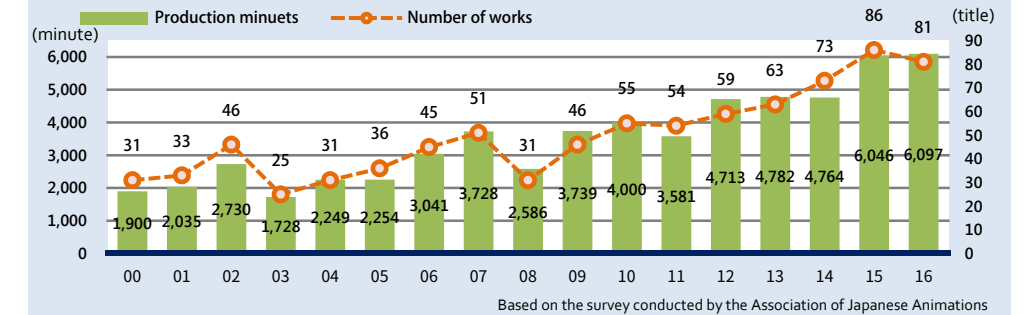
Since the mid-90's, the box office for theatrical animations was pushed up by Ghibli works. In 2015, however, the box office recorded ¥47.7 billion without the release of any works by Ghibli, which gave the animation industry an optimistic outlook that it could somehow do well without Ghibli. Just then, the thing no one ever expected happened: the arrival of "Your Name.". It had been thought that the box office records established by Hayao Miyazaki were unbreakable; nevertheless, "Your Name." recorded the 2nd largest box office records among all Japanese movies. It is indeed a miracle considering the box office of the director's previous work only reached an estimated ¥150 million. The hit absolutely drew attention to theatrical animation businesses, and the box office of theatrical animations will probably stay strong for a while.



### Number of theatrical animation works and their production minutes (2000-2016)

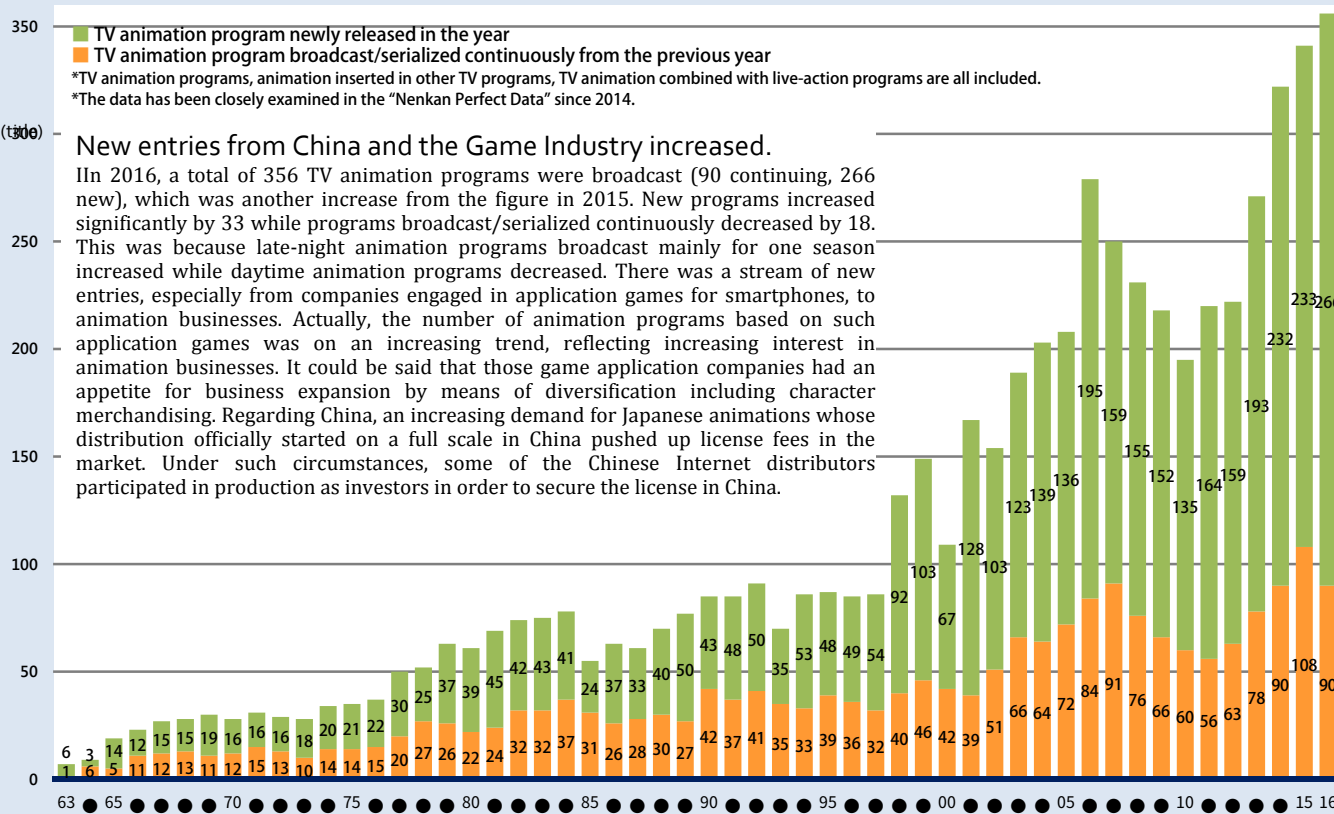
The number of theatrical animation works increased continuously thanks to the active market.

In 2016, 81 theatrical animation works were released. This was a slight decrease compared to 86 in 2015, but the second-most in history. On the other hand, the production minutes in 2016 increased slightly (6097 minutes in 2015 when the production minutes first exceeded 6000 minutes). This was because of the continuous success of regular animation series such as "Detective Conan" and "Doraemon" as well as the boom of small- and mid-sized movies. Then the mega-hit "Your Name." arrived. It is not hard to imagine the success of that work stimulating creative desires in the industry. That's the way the world goes. The theatrical animation market will be active from now on.



## Data & Topics of Japanese Animation Industry 2017

### Number of TV animation programs (1963-2016)



New entries from China and the Game Industry increased.

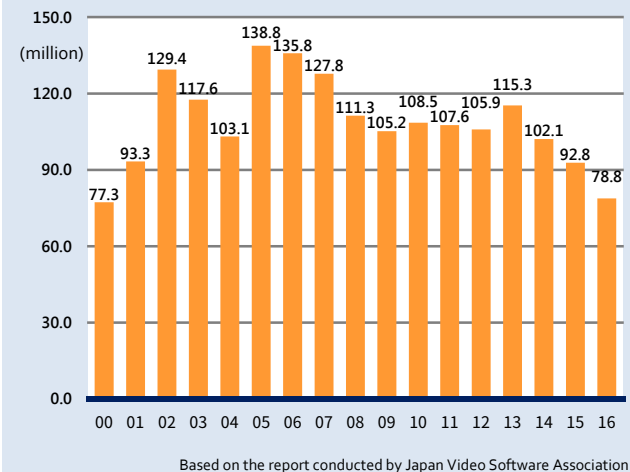
In 2016, a total of 356 TV animation programs were broadcast (90 continuing, 266 new), which was another increase from the figure in 2015. New programs increased significantly by 33 while programs broadcast/serialized continuously decreased by 18. This was because late-night animation programs broadcast mainly for one season increased while daytime animation programs decreased. There was a stream of new entries, especially from companies engaged in application games for smartphones, to animation businesses. Actually, the number of animation programs based on such application games was on an increasing trend, reflecting increasing interest in animation businesses. It could be said that those game application companies had an appetite for business expansion by means of diversification including character merchandising. Regarding China, an increasing demand for Japanese animations whose distribution officially started on a full scale in China pushed up license fees in the market. Under such circumstances, some of the Chinese Internet distributors participated in production as investors in order to secure the license in China.

### Animation videograms (2000-2016)

■ Revenues of Animation videograms  
 \*Revenues of animation videograms are the total amount of genres aimed towards both adults and children among all Japanese animations in the report by Japan Video Software Association.

The animation videogram market deteriorated into a full-scale slump.

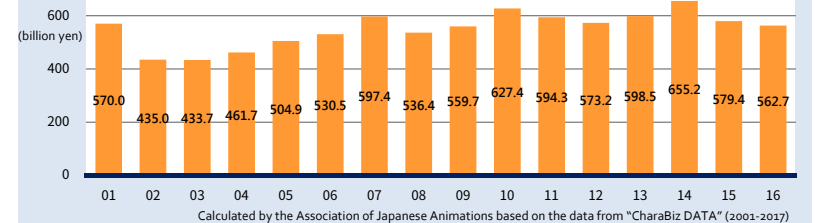
The size of the animation videogram market in 2016 was 78.3 billion yen, decreasing for three consecutive years, by 15.1% from the previous year. Actually, many of the industry participants mentioned the market slowdown in recent years, as confirmed by the data here indicating that the animation videograms market has reached a big turning point. How the other media take the videogram market now on a full-scale slump is an urgent issue for the industry.



### Merchandising related to animations (2000-2016)

\*Revenues of the top 100 Japanese animation character sale rankings were tallied.  
 \*Revenues arising from the use of characters in advertisements, promotions and Pachinko/Pachinko-slot were not included.  
 \*Totals from 2007 to 2013 were recalculated in 2014.

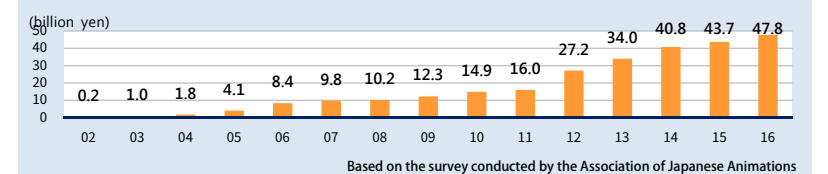
The market size shrunk due to the shift from real products to digital products. The size of the Japanese merchandising market related to animation characters shrunk to ¥562.7 billion, which was 97.1% of its size in the previous year. This was because digital products (especially application games) were not included in the data. Actually, the overall market size (i.e. the revenues of animation studios) increased significantly. Surely consumers are losing their appetites for real products along with the shift to digital products. From now on, it is essential for character merchandising businesses to build a new business scheme incorporating digital products.



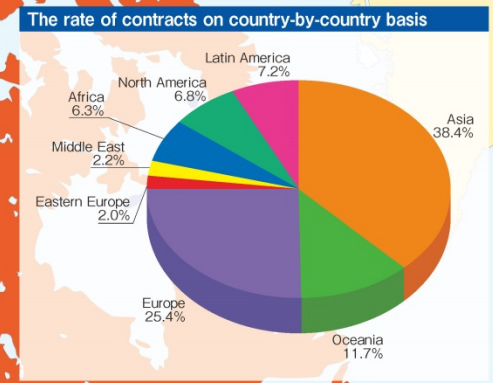
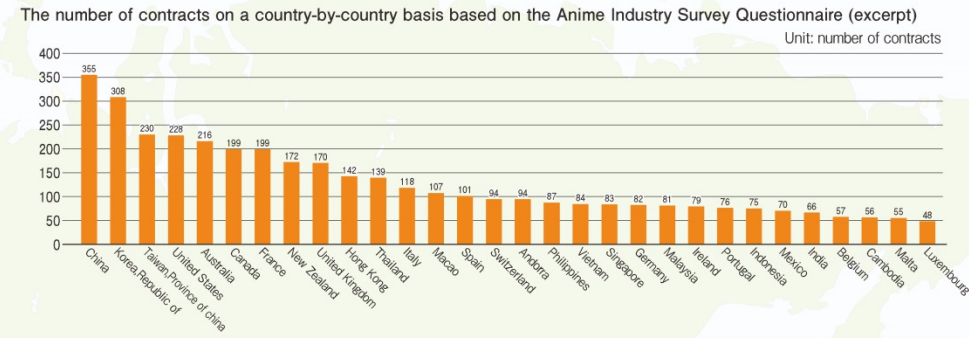
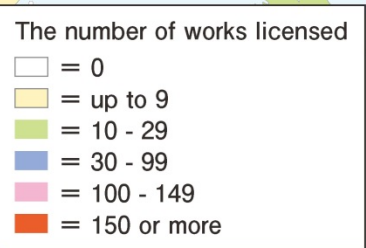
### Animation distribution via the Internet (2002-2016)

The animation distribution market grew continuously in a mutual complementary relationship with the videograms market.

In 2016, the size of the Japanese animation distribution market via the Internet was ¥47.6 billion, increasing by 9% over the previous year. Some thought the market, growing continuously through the 2000s, would take over the animation videograms market; however, it is more practical to see that the videograms market remains parallel with the distribution market, just like analog records did. Animation works via Internet distribution are mainly targeted to a general audience while those in the videograms market are targeted to anime fan communities, though the market shrinkage is unavoidable. Thanks to those differences, the Japanese animation market has been diversified.

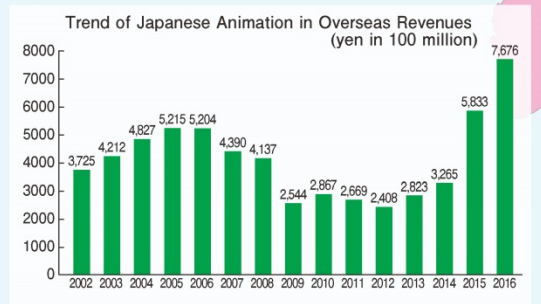


# Japanese Animation in Overseas Markets (2017 version)



## The overseas market expanded. China came first in terms of the number of contracts.

In 2016, Japanese animation earned ¥767.6 billion in the overseas market, recording the highest sales which substantially exceeded the record established during the DVD bubble years from 2005 to 2006. Meanwhile, a total of 6639 contracts were made in 221 countries/regions according to survey responses from 19 companies (4345 in 2015). This was the record high with an increase of 1.5 times over the previous year and the number of countries/regions also broke records. Looking at the data by country, China came first (335), followed by South Korea (308) and Taiwan (230). The United States, having been the top until 2015, dropped to 4th place (228). In terms of types of contracts, contracts for broadcasting rights were still major while contracts in connection with internet distributions rights increased dramatically. New business models, including collaborations with Chinese companies as well as global distribution platforms, also grew; however, the Japanese animation industry should be reinforced as to not turn into nothing but a commissioned factory for those partners.



Top 10 animation works in overseas music royalties in the last 3 years

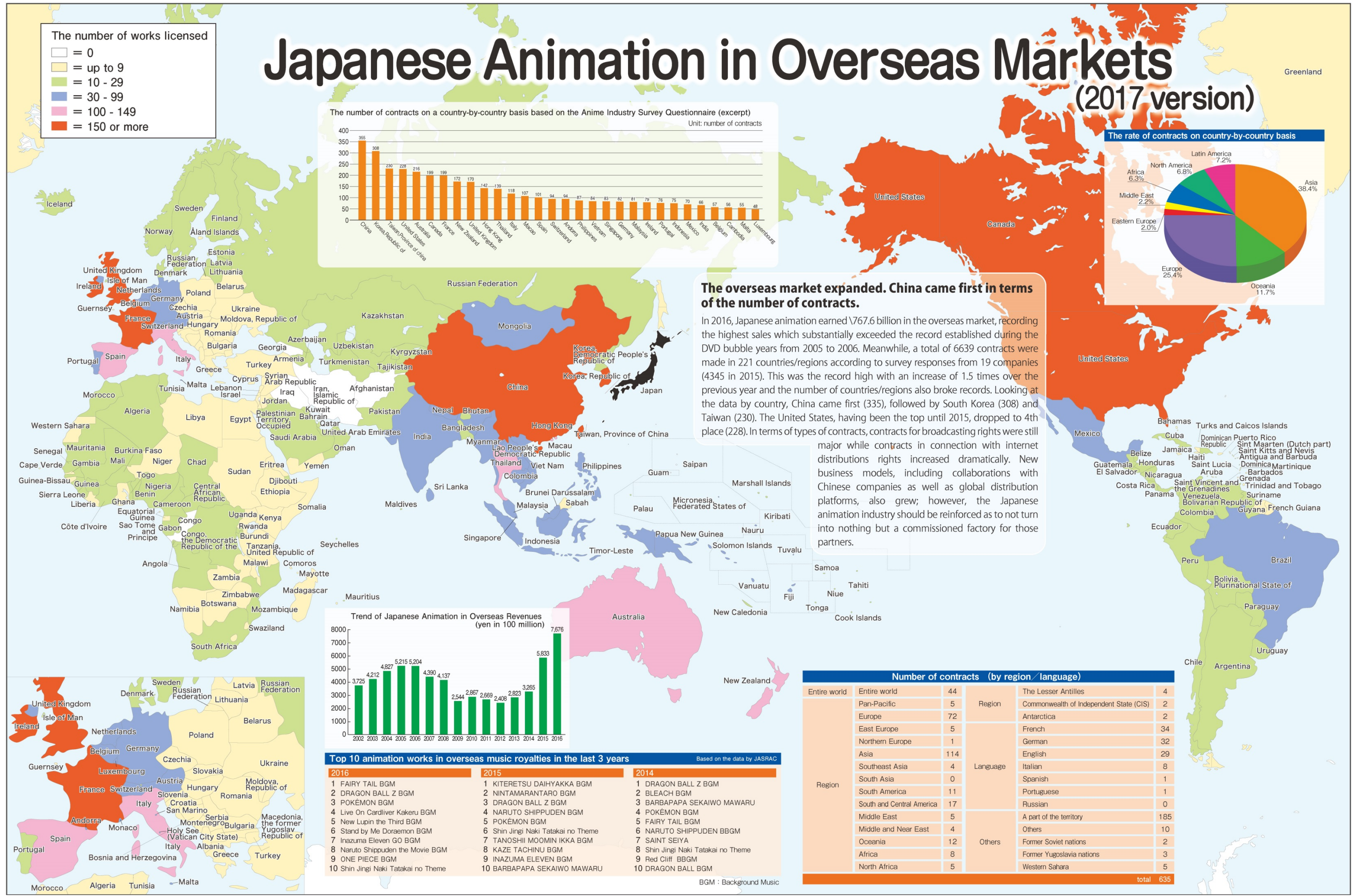
Based on the data by JASRAC

Year	Rank	Work
2016	1	FAIRY TAIL BGM
	2	DRAGON BALL Z BGM
	3	POKEMON BGM
	4	Live On Cardliver Kakeru BGM
	5	New Lupin the Third BGM
	6	Stand by Me Doraemon BGM
	7	Inazuma Eleven GO BGM
	8	Naruto Shippuden the Movie BGM
	9	ONE PIECE BGM
	10	Shin Jingi Naki Tatakai no Theme
2015	1	KITERETSU DAIHYAKKA BGM
	2	NINTAMARANTARO BGM
	3	DRAGON BALL Z BGM
	4	NARUTO SHIPPUDEN BGM
	5	POKEMON BGM
	6	Shin Jingi Naki Tatakai no Theme
	7	TANOSHII MOOMIN IKKA BGM
	8	KAZE TACHINU BGM
	9	INAZUMA ELEVEN BGM
	10	BARBAPAPA SEKAIWO MAWARU
2014	1	DRAGON BALL Z BGM
	2	BLEACH BGM
	3	BARBAPAPA SEKAIWO MAWARU
	4	POKEMON BGM
	5	FAIRY TAIL BGM
	6	NARUTO SHIPPUDEN BBGM
	7	SAINT SEIYA
	8	Shin Jingi Naki Tatakai no Theme
	9	Red Cliff BBGM
	10	DRAGON BALL BGM

BGM : Background Music

Number of contracts (by region/language)

Region	Number of contracts	Language	Number of contracts	
Entire world	44	The Lesser Antilles	4	
Region	Pan-Pacific	5	Commonwealth of Independent State (CIS)	2
	Europe	72	Antarctica	2
	East Europe	5	French	34
	Northern Europe	1	German	32
	Asia	114	English	29
	Southeast Asia	4	Italian	8
	South Asia	0	Spanish	1
	South America	11	Portuguese	1
	South and Central America	17	Russian	0
	Middle East	5	A part of the territory	185
Middle and Near East	4	Others	10	
Oceania	12	Former Soviet nations	2	
Africa	8	Former Yugoslavia nations	3	
North Africa	5	Western Sahara	5	
total		635		

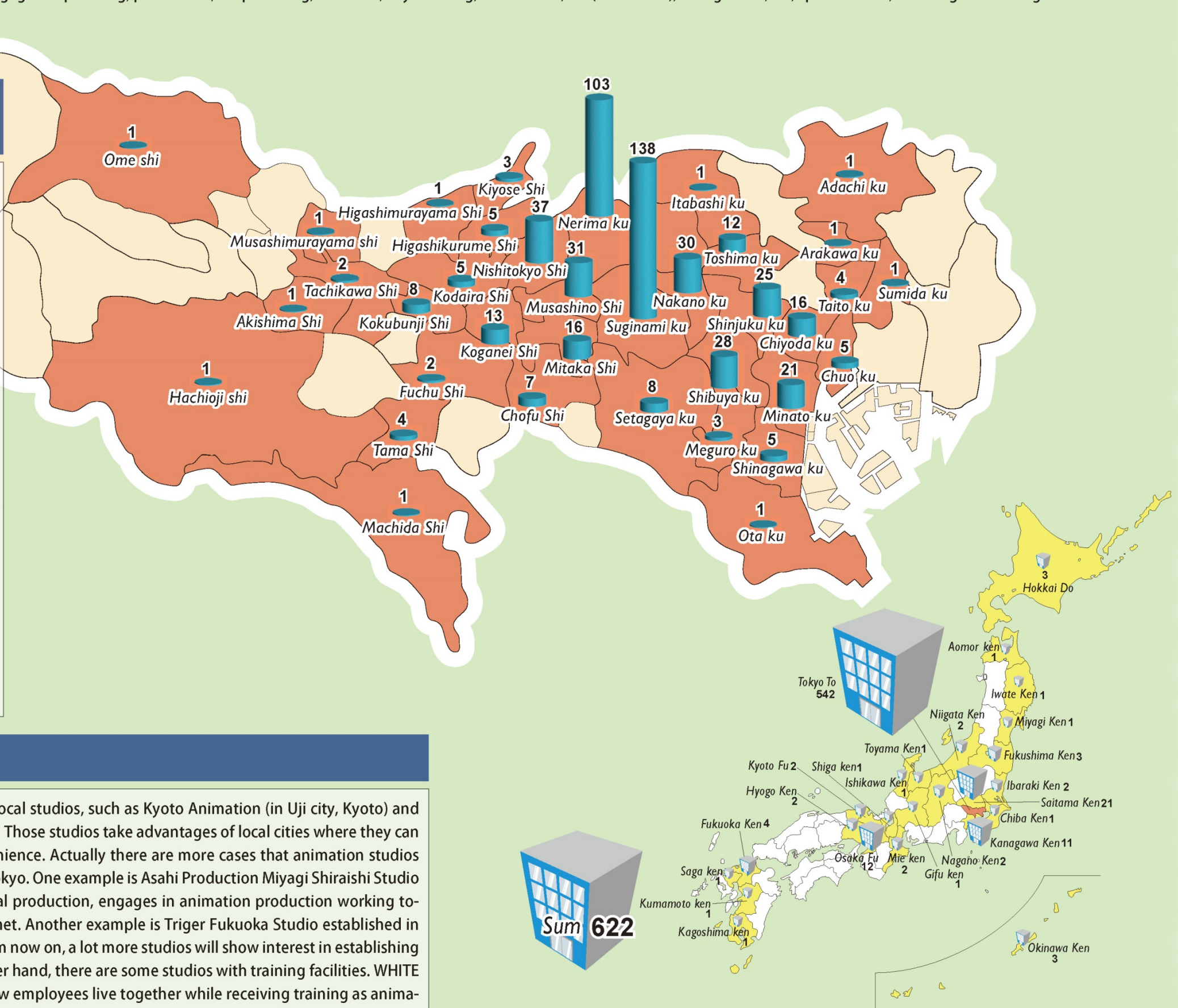


# Distribution of Japanese animation studios (2016 version)

\* Animation studios herein includes business operators engaged in planning, production, script writing, direction, key-drawing, in-between, CG (2D and 3D), background, art, special effect, shooting and editing.

## The trend seen in the distribution map of anime studios

In Tokyo, 542 anime studios (i.e. business operators engaged in planning, production, script writing, direction, key-drawing, in-between, CG (2D and 3D), background, art, special effect, shooting and editing) are located, which is 87.1 % of all Japanese studios. The map also shows many of them are concentrated in Suginami (138) and Nerima (103). This reflects the history of Japanese animation industry. Since Toei-Doga (now Toei Animation) and Mushi Production were originally in Oizumi and Fujimidai respectively, many other studios were also established in the area along Seibu Ikebukuro line and in its neighborhood in Nerima. In terms of Suginami, many are concentrated in Shimoigusa, logi and Kamigusa, the area along the Seibu Shinjuku line, and in Koenji, Asagaya and Ogi-kubo, the area along JR Chuo line. This is because the Seibu Shinjuku line is close to the studios along the Seibu Ikebukuro line, also Tokyo Movie Shinsha (now TOMs Entertainment) was in Minami Asagaya close to JR Chuo line in 1970's. Comparing the distribution map in 2001 and that in 2016, the number of the studios increased remarkably both in Suginami (from 70 to 128) and Nakano (from 14 to 30). This is because the convenience value of those two areas increased since TOMs Entertainment and Toei Animation moved the headquarters to Nakano in 2012 and in 2013 respectively.



## Anime Production in Local Cities

While anime studios are overly concentrated in Tokyo, some local studios, such as Kyoto Animation (in Uji city, Kyoto) and P.A. WORKS (in Nanto city, Toyama), are doing well constantly. Those studios take advantages of local cities where they can focus solely on animation production despite a lack of convenience. Actually there are more cases that animation studios with the headquarters in Tokyo have branch studios outside Tokyo. One example is Asahi Production Miyagi Shiraishi Studio established in Miyagi in 2010. The studio, specialized in digital production, engages in animation production working together with the main studio in Tokyo connected via the Internet. Another example is Trigger Fukuoka Studio established in 2016, planning to hire staff with a view to digital drawing. From now on, a lot more studios will show interest in establishing local studios specialized in digitalized production. On the other hand, there are some studios with training facilities. WHITE FOX Izu Studio, established in 2016, has a dormitory where new employees live together while receiving training as animators. We need to pay attention how such movement brings a change to the structure of current animation industry.

Based on the survey by the Association of Japanese Animations

The market size exceeded 2 trillion yen for the first time!  
All the necessary information is in this report!

# Anime Industry 2017

We, the Association of Japanese Animations, are engaged in research, surveyance, and analysis of markets in connection with the Japanese animation industry. We have also published the "Anime Industry Report" since 2009 in order to disseminate information about the industry to the world.

As the result of the survey for this report, the market size reached 2.009 trillion, increasing by 9.9% yearly over last year and recording the largest result consecutively for the past four years.

The main trends were the growth of Movies (up 41.1%), Overseas (up 31.6%) and Live Entertainment (up 29.5%). Internet Distribution and Music also increased by approximately 10%.

The "Anime Industry Report 2017" is the report for trends in the Japanese animation industry, including that of respective media, in 2016, and is issued with "All Animation Works Perfect Data" as an appendix. So far, this reliable data has been adapted as the basis for official materials such as the Media Fine Arts Database by the Agency for Cultural Affairs.

## ■Outline

<b>【Title】</b>	Anime Industry 2017
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<b>【Price】</b>	6,000 yen (tax excluded)
<b>【Index】</b>	

### 1. Overview of the Japanese animation industry in 2016

\*Overall market trends, domestic industrial movements and notable trends

### 2. Trends in respective media

\*Animation distribution market (TV animation, theatrical animation, videogram, Internet distribution), secondary use (including merchandising), advertisement/promotion, music and live entertainment

### 3. Trends in Overseas Markets

\*Japanese animation in the global market, Japanese animation production

## Appendix: All Animation Works Perfect Data in 2015

\*TV, Theatrical and OVA

## Chart

\*Trends in the Japanese Animation Market, Recent Movements of the Japanese Animation Industry and Market, Development of Japanese Animation in the Overseas Market, and Distribution Map of Japanese Animation Studios

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### Kyoto International Manga Museum

Karasuma-Oike, Nagakyo-ku, Kyoto Japan \*The site of the former Kagoike Elementary School

※The back issues (2009 version - 2015 version) are also available at the stores above.

SPI Information's web site : <http://www.spi-information.com/>