

# Anime Industry Report 2020

## Summary

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The Association of Japanese Animations

# Japanese Animation Industry Records Marked and Unexpected Growth in Both Domestic and Overseas Markets

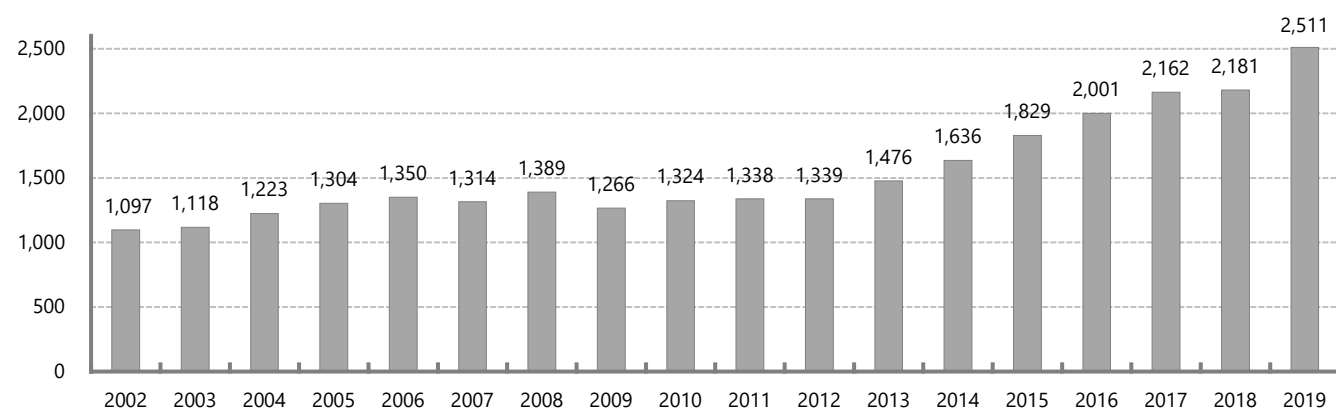
In 2019, the Japanese animation market recorded 10 consecutive years of growth, with 7 consecutive years of record-breaking sales. The market size reached 2.5112 trillion yen (115.1% of the previous year), thanks to growth both in the domestic and overseas markets. Despite negative factors, including Japan's aging and shrinking population and China's tighter regulations that were put into effect in April 2019, the Japanese animation industry recorded more than a 15% growth compared to the previous year.

## Unanticipated Yet Significant Growth

〈The market size recorded 10 consecutive years of growth with sales of 2.51 trillion yen (115.1% of the previous year), thanks to growth in both domestic and overseas markets.〉

It was anticipated that the Japanese animation market size would shrink in 2019, due to negative factors in both domestic and overseas markets. The domestic market, which hit a peak in 2014, has shrunk continuously due to Japan's aging and shrinking population. Meanwhile, the Chinese government imposed tighter restrictions on the overseas market in April 2019. Against expectations for the contrary, however, the Japanese animation market recorded more than a 15% increase from the previous year. The growth can be partially attributed to Movies, which brought in the highest sales on record of 69.2 billion yen (162.4% of the previous year). Breaking its own record year after year, Streaming also made the highest sales on record. It brought in 68.5 billion (115.1% of the previous year), and Live Entertainment recorded 84.4 billion yen (109.0% of the previous year). But the main factor was the strong growth of the top three genres: Overseas Sales (1.2009 trillion yen; 119.0% of the previous year), Merchandise Sales (581.3 billion yen; 116.2% of the previous year) and Pachinko (319.9 billion yen, 112.8% over the previous year). With regards to the Overseas segment, the impact of the slowdown in the Chinese market was not as serious as expected. For Merchandising, two popular characters, Rilakkuma and Sumikkogurashi, were turned into animation series, which contributed to boosting sales. For Pachinko, the increased number of pachinko slot machines and collaborations with animated works delivered significant growth.

[Figure 1] The Japanese Animation Market in a Broad Sense (Yen in billions)



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

[Figure 2] Japanese animation market trends in a broad sense (billion yen)

item	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
①TV	124.1	116.5	110.0	104.1	100.3	92.4	94.6	95.5	89.5	90.0
②Movie	21.8	19.1	40.2	18.8	28.9	21.6	34.8	31.1	33.7	28.5
③Video	129.4	117.6	103.1	138.8	135.8	127.8	111.3	105.2	108.5	106.7
④Internet Distribution	0.2	1.0	1.8	4.1	8.4	9.8	10.2	12.3	14.9	16.0
⑤Merchandising	435.0	433.7	461.7	504.9	530.5	597.4	536.4	559.7	627.4	594.3
⑥Music	13.8	9.1	23.5	12.0	26.1	26.3	35.0	41.4	40.6	32.5
⑦Overseas	372.5	421.2	482.7	521.5	520.4	439.0	413.7	254.4	286.7	266.9
⑧The Pachinko and the like	-	-	-	-	-	-	152.8	166.5	122.6	202.6
⑨Live Entertainment	-	-	-	-	-	-	-	-	-	-
Total	1,097	1,118	1,223	1,304	1,350	1,314	1,389	1,266	1,324	1,338

item	2012	2013	2014	2015	2016	2017	2018	2019	YoY
①TV	95.1	102.0	110.7	107.2	105.9	106.9	114.4	97.0	84.8%
②Movie	40.9	47.0	41.7	47.7	66.3	41.0	42.6	69.2	162.4%
③Video	105.9	115.3	102.1	92.8	78.8	76.5	58.7	56.3	95.9%
④Internet Distribution	27.2	34.0	40.8	43.7	47.8	54.0	59.5	68.5	115.1%
⑤Merchandising	573.2	598.5	655.2	579.4	562.7	523.2	500.3	581.3	116.2%
⑥Music	28.3	29.6	29.2	32.5	36.9	34.4	35.8	33.7	94.1%
⑦Overseas	240.8	282.3	326.5	583.3	767.6	994.8	1009.2	1200.9	119.0%
⑧The Pachinko and the like	227.2	242.7	298.1	294.1	281.8	268.7	283.5	319.9	112.8%
⑨Live Entertainment	-	24.8	31.8	48.4	53.2	62.9	77.4	84.4	109.0%
Total	1,339	1,476	1,636	1,830	2,001	2,162	2,181	2,511	115.1%

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

## Topics in the Japanese Animation Industry from 2019 to 2020

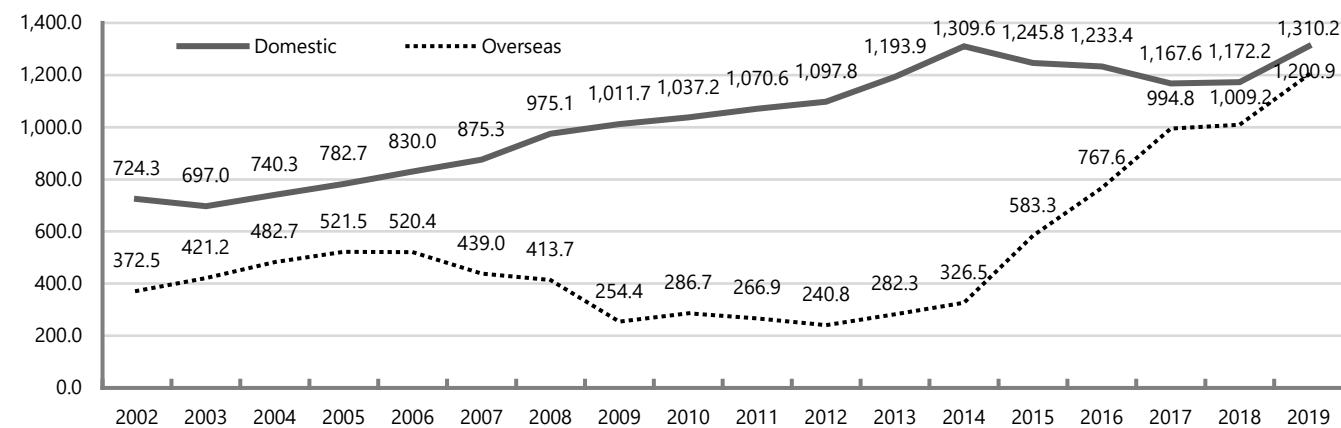
〈The Market Recorded the Highest Sales Due to Strong Demands〉

At the end of 2018, the Japanese animation market was expected to shrink in the following year. This was because the domestic market had taken a downward turn after hitting a peak in 2014. The Chinese live streaming e-commerce market, which has been causing shopping sprees for the previous few years, was also expected to take a downward turn. The survey, however, revealed that the Japanese animation industry in both markets mainly grew because of concrete demands brought about by the spread of live streaming e-commerce. The trend was also reflected in the comments for the questionnaire: "The number of orders that we received increased thanks to the strong overseas and live streaming e-commerce markets." "Now that the number of orders we're receiving has increased, we can expect an upturn." Such positive comments were seen more than ever. It is likely that the increase of the orders, despite a rise in production unit costs, is due to increasing demands for new animation titles, along with the growth of live streaming e-commerce.

### 〈Domestic Markets Held the Lead over Overseas Markets〉

It was expected that sales in the overseas market, which had grown rapidly since 2015, would overtake those of the domestic market in 2018. However, they did not as sales stagnated due to Chinese buyers holding off purchases in anticipation of tighter regulations. In 2019, the size of the overseas market grew significantly (119.0% of the previous year) while the domestic market also recorded its highest sales. As such, the domestic market held its lead over the overseas market. However, it is certain that the overseas market will overtake the domestic market in the near future, due to the shrinking domestic market as a result of Japan's aging and shrinking population and the growth of U.S. streaming platforms and overseas games that are based off of animated works.

[Figure 3] The Trend of the Domestic Market and Overseas Market in a Broad Sense (hundred million yen)



Based on questionnaires conducted by the Association of Japanese Animations  
 ※The annual average rate of Principal Global Indicators is adopted as the exchange rate.

### 〈Effects of the COVID-19 Pandemic〉

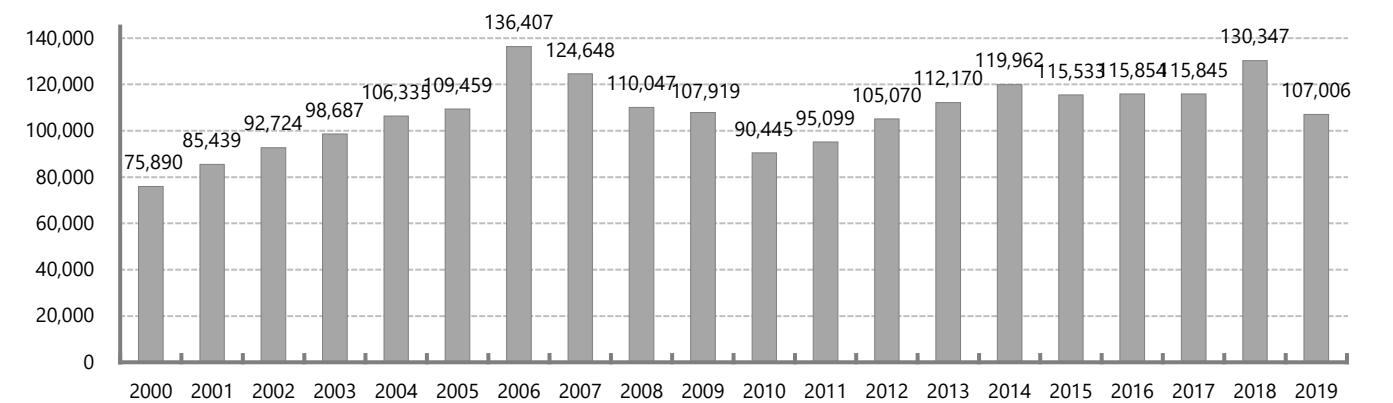
2020 saw the spread and effects of COVID-19, which no one ever expected. Many animated TV shows, including existing shows, were delayed or suspended in April, which is usually the busiest time of the year with new TV programs starting. On the other hand, theater screenings as well as live performances were completely halted. Under such circumstances, those in the industry felt a sense of great anxiety. It is true that COVID-19 affected the animation industry. However, not all of its impacts were negative. Instead, it encouraged people to develop a habit of streaming anime. As mentioned before, streaming has a great potential to increase demands for animation in the future. After landing in Japan in September 2015, Netflix garnered 3 million subscribers in its first 4 years. In a single year (September 2019 to September 2020), it acquired another 2 million subscribers, reaching 5 million in total. This fact surely indicates the future of the industry.

### 〈What Does the Sudden Drop in MProduction Minutes Mean for the TV Animation Industry?〉

In 2018, the 2nd highest amount of production minutes in history was recorded. 107,006 minutes were recorded in 2019. There was a sudden decrease by 23,341 minutes compared to the previous year, so 2019 had almost the same amount as 2012. In terms of the number of TV animation titles, 2019 had 314, which was also a decrease from the previous year (350 in 2018). Some factors might have been the causes for this. Firstly, the deceleration of sales in the Chinese market could be noted as the cause of the significant drop of new animation tiles. On the other hand, some say the decrease can be attributed to the postponement of 2020 broadcasts in Japan in order to delay delivery to China

(where all the episodes have to be delivered at once). Some also say progress of the shift to theatrical animations and to streaming might be the cause. So what does the decrease mean? So far, TV animations have been considered the industry's main market. It has also been said they decide the business trend of the industry. Whether the TV animation market shrinks from now on, or whether the shift to streaming and theatrical animations has already started – it is too early to make a judgement. It should be judged after COVID-19 passes and the trends in 2021 are revealed.

[Figure 4] Production Minutes of TV Animations



Based on a survey conducted by the Association of Japanese Animations

### 〈The Rise of Unit Production Costs, Reform of Working Practices, and COVID-19〉

It became clear that unit production costs rose in recent years, which was also seen in the responses for the questionnaires from some animation studios. The costs increased along with the rise in employment and management costs, though such an increase was partially attributed to the higher unit costs from major American platforms. It has been said that the budgets for TV animations have been low since the time of Astro Boy. But now it seems quite difficult to produce TV animations within their limited budgets.

In terms of the increase in unit production costs, there were various factors at play. Firstly, there was a demand for higher quality animation. The demand increased in the market, along with the rise of animation catered towards adults in the 2000s. Also, the industry was forced to respond to the move towards high-definition imaging, along with the transition to digital terrestrial TV broadcasting. Under such circumstances, the industry faced a lack of skilled creators who could satisfy the demands (and would require a higher level of compensation), and therefore invested in human resources. At the same time, the Japanese government requested that all industries reform working practices. Increasing staff per title along with a review of shifts and in-house systems, turning part-time and fixed-term contract workers into regular employees, and reforming existing payment systems – all those factors led to an increase in unit production costs. In addition, further factors were brought on by the COVID-19 pandemic in 2020. Though it is possible to handle large portions of animation production from home, the industry was required to spend extra costs on equipment and staff-managing systems to make working remotely possible. Also, other extra costs related to sound effects were added due to dubbing delays and rescheduling. Now most studios have their plates full trying to deliver the works. At this moment, it is hard to say how such extra costs will affect the actual balance of income and expenditure.

## 〈Animation Creators Earn More than the Average Annual Salary of a Worker in the Private Sector〉

On November 10, 2019, the Japan Animation Creators Association (JAniCA) published “The Report on a Fact-Finding Survey about Animation Creators 2019.” The survey revealed that the average annual salary of animation creators was slightly higher than that of employees working in the private sector across the board. (This is compared to the fact that the average annual salary of animation creators was 1.794 million yen lower than that of employees in all parts of the private sector in the first survey in 2009.) Considering the fact that the average age of animation creators is 7.15 years younger than that of private sector employees, the actual difference in pay would be wider. Also, additional earnings, including royalties, licensing fees, tuition, executive salaries and others arising from illustrations, manga, and fan publication et cetera were probably not calculated in the survey. If such earnings were added, the average annual salary of animation creators could be estimated to reach 4,969,000 yen, which would close to the median of average salaries in all sectors. Although it is hard to establish a causal relationship between the rise in unit production costs and the increase in the average salary, there must be some connections.

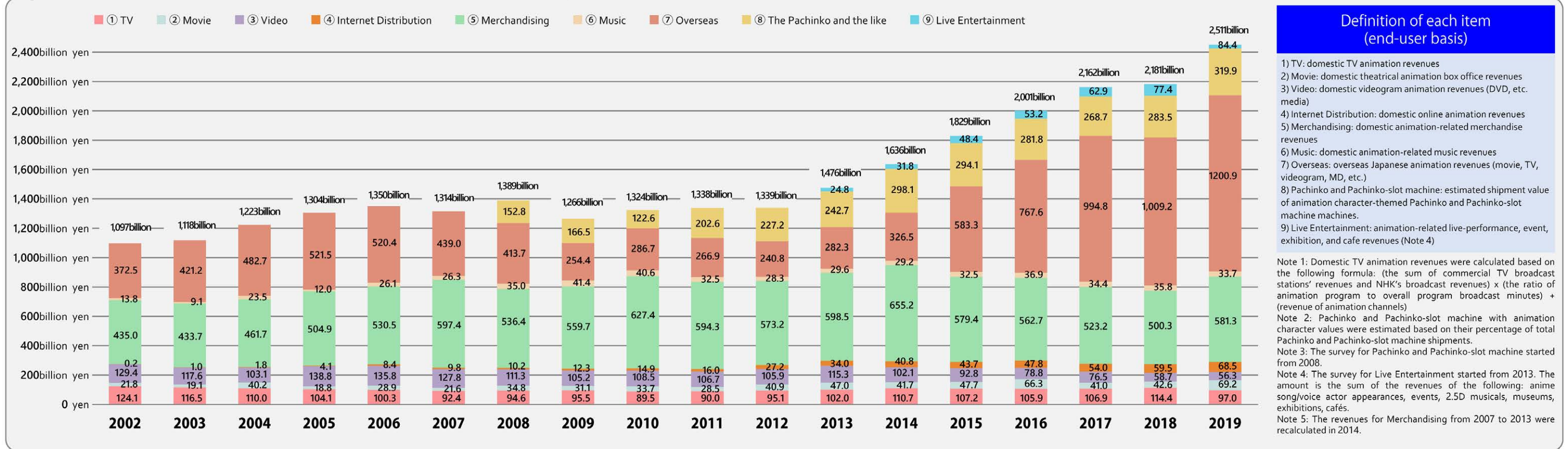
Animation creators include directors, executive animation directors, producers, character designers, animation directors, 3D CG animators, rendition staff, storyboard writers, licensors, background art designers, color coordinators, shooting staff, production assistants, key animators, animation checkers, layout/rough-drawing staff, finishing staff, the 2nd key animators, animators and others.



# Trends in Japanese Animation Market (2019 version)

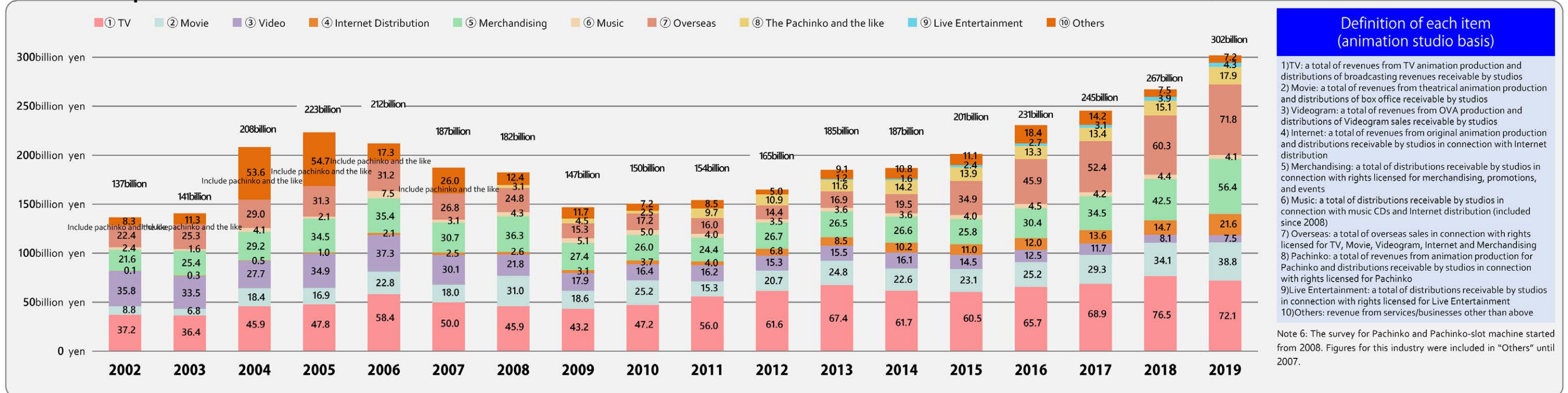
The upper part shows Japanese animation market trends in a broad sense (i.e. market size based on estimated revenues in animation and animation-related product markets). The lower part shows Japanese animation market trends in a more limited sense (i.e. market size based on the estimated revenues of 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 – 2019)



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 – 2019)



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



# Trends in Japanese Animation Market (2019 version)

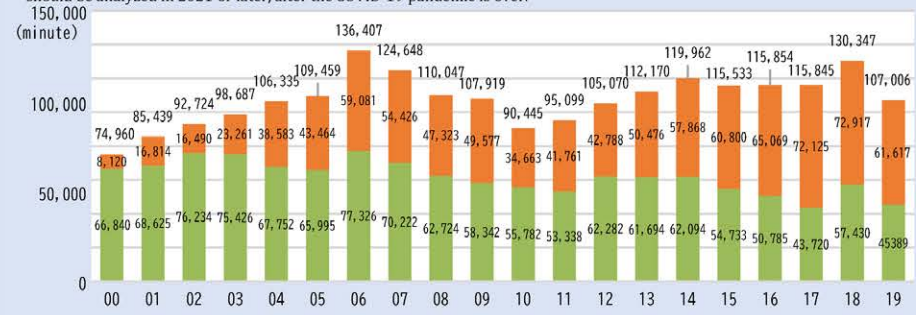
## Internet Overtook Videogram in the Diversifying Animation Business

### Production Minutes of TV Animations (2000-2019)

■ Kids/family animations ■ Animations aimed at adults  
 \*The production minutes of TV animations in 2011 increased as the result of recalculation.

#### TV animation production minutes dropped significantly.

The amount of TV animation production minutes in 2019 dropped to 107,006, a decrease of 23,341 minutes from the 2nd most minutes ever recorded in 2018. This figure was almost the same as that of 2012's, during a time when the TV animation market was gradually climbing upwards from the bottom it hit in 2010. The number of production minutes of animations aimed at adults was 84.5% of the previous year while that of kids/family animations was 79.0% of the previous year. Thus, the production minutes decreased in both categories, which was likely caused by a deceleration of sales in the Chinese market on top of the postponement of TV broadcasts in Japan. In terms of kids/family animations, the number of new titles, which were not many to start with, decreased by half. This significantly impacted the total production minutes. But it seems too early to judge whether TV animation will shrink from now on, or whether the shift to streaming services and theatrical animations has already started. It should be analyzed in 2021 or later, after the COVID-19 pandemic is over.



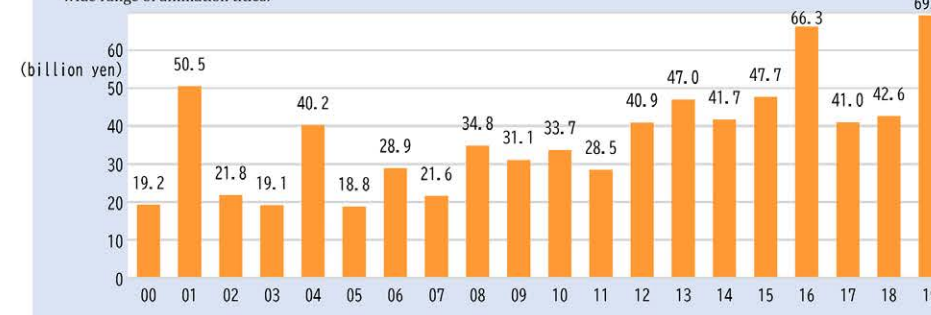
Based on a survey conducted by the Association of Japanese Animations

### Box Office Revenue of Theatrical Animations (2000-2019)

■ Box Office Revenue \*All theatrical animations released via ordinary and independent distribution routes are included.

#### Theatrical animations recorded the highest box office record of 69.2 billion yen

In 2019, Japanese theatrical animations recorded the highest box office record of 69.2 billion yen, breaking the record of 66.3 billion yen set in 2016, by Your Name. The growth rate was 162.4% of the previous year, which also had been the highest so far. The main factor of the growth was the huge success of Weathering with You, a theatrical animation Makoto Shinkai directed after Your Name. However, the box office profits from the work occupied only 20% of overall box office earnings from theatrical animations as a whole. This was a smaller portion than that of Your Name (2016), which occupied 37%, and that of Spirit Away (2001), which occupied 60%. Along with Weathering with You, regular feature animation series including Detective Conan and ONE PIECE showed strong success. In addition, series such as Uta no☆Prince-sama and Fate which originated from TV series and were targeted core anime fans showed steady success. Thus, the category was supported by successful movies derived from a wide range of animation titles.



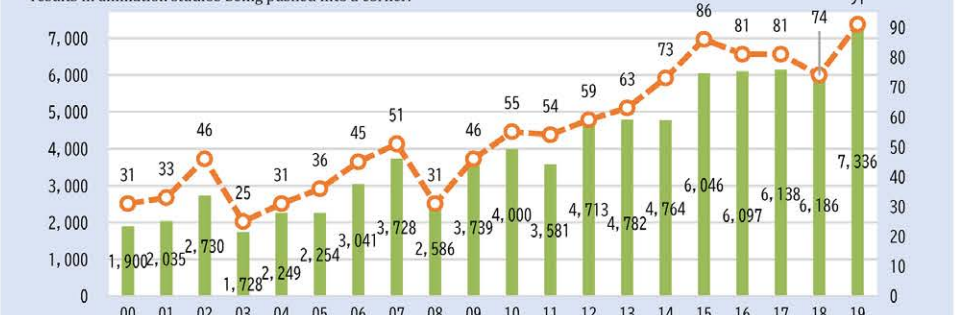
Source: The Association of Japanese Animations, based on the data by Motion Picture Producers Association of Japan/Kinema Junpo/Bukatsushinsha(Data edited by Mindbase Inc. from 2000 to 2008 and by the Association of Japanese Animations from 2009 to 2017)

### The Number of Theatrical Animation Works and the Production Minutes (2000-2019)

■ Production minutes ○ Title

#### Both minutes and titles produced broke the previous records.

In 2019, 91 theatrical animations were produced in Japan. It was a significant increase from 74, the number recorded in 2018 (the year which saw a decline for the first time in a while). On the other hand, the number of the production minutes, which had remained relatively similar in the previous few years, was 7,336 (118.6% of the previous year), showing an upward turn from the previous year. In fact, both figures were the record high in the history of the industry. Compared to 20 years ago, the number of titles grew threefold and the number of production minutes grew fourfold. Yet the share of the animation titles among all Japanese movie titles was only 10% or so. On the other hand, those animation titles dominated 48.7% of the whole box office when considering only Japanese movies. Under such circumstances, each company is strengthening its theatrical animation business. Also, the number of new entrants in the field is increasing. However, we should not overlook the fact that such rapid growth results in animation studios being pushed into a corner.



Based on the survey conducted by the Association of Japanese Animations

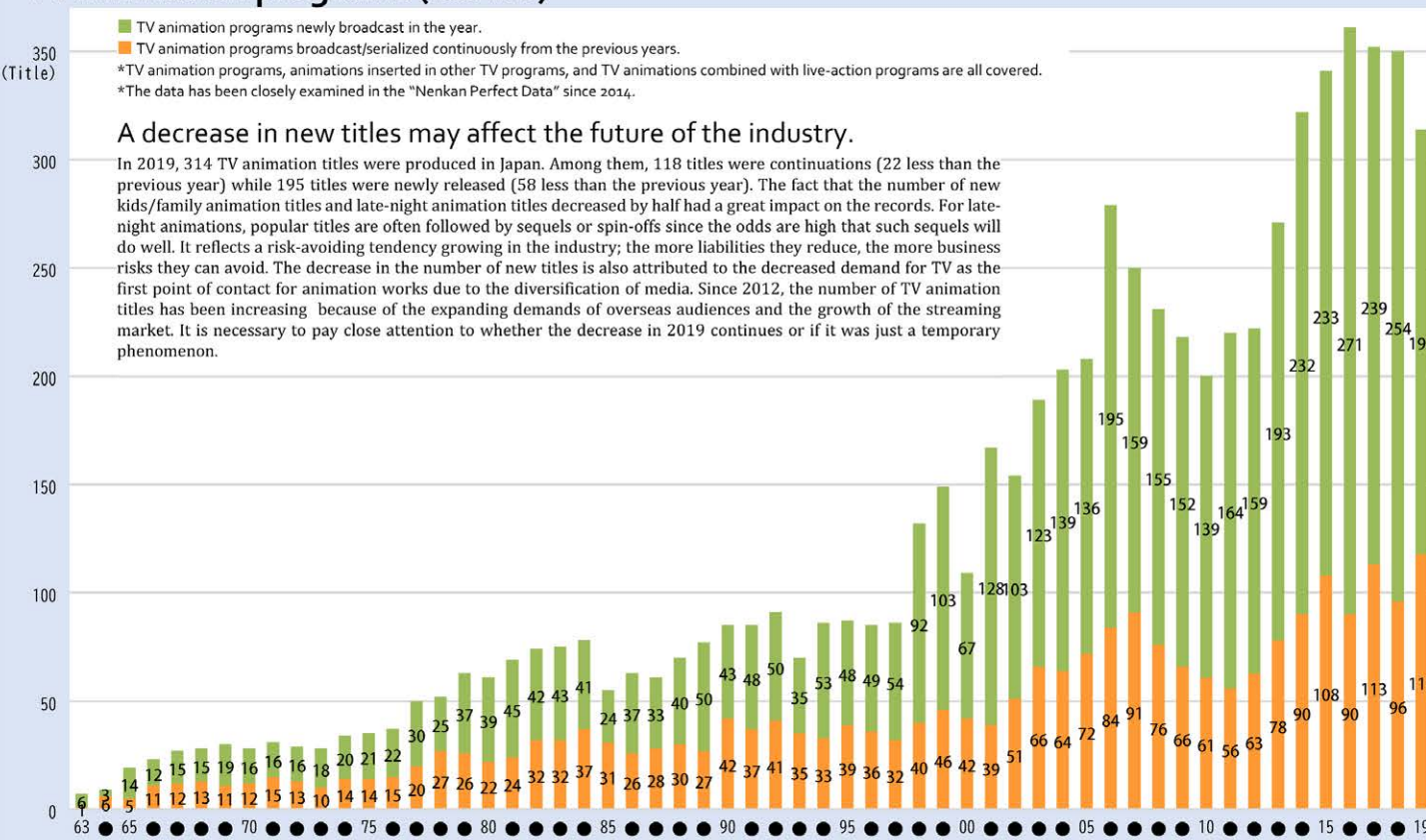
## Data & Topics of Japanese Animation Industry 2019

### TV Animation programs (1963-2019)

■ TV animation programs newly broadcast in the year. ■ TV animation programs broadcast/serialized continuously from the previous years.  
 \*TV animation programs, animations inserted in other TV programs, and TV animations combined with live-action programs are all covered.  
 \*The data has been closely examined in the "Nenkan Perfect Data" since 2014.

#### A decrease in new titles may affect the future of the industry.

In 2019, 314 TV animation titles were produced in Japan. Among them, 118 titles were continuations (22 less than the previous year) while 195 titles were newly released (58 less than the previous year). The fact that the number of new kids/family animation titles and late-night animation titles decreased by half had a great impact on the records. For late-night animations, popular titles are often followed by sequels or spin-offs since the odds are high that such sequels will do well. It reflects a risk-avoiding tendency growing in the industry; the more liabilities they reduce, the more business risks they can avoid. The decrease in the number of new titles is also attributed to the decreased demand for TV as the first point of contact for animation works due to the diversification of media. Since 2012, the number of TV animation titles has been increasing because of the expanding demands of overseas audiences and the growth of the streaming market. It is necessary to pay close attention to whether the decrease in 2019 continues or if it was just a temporary phenomenon.

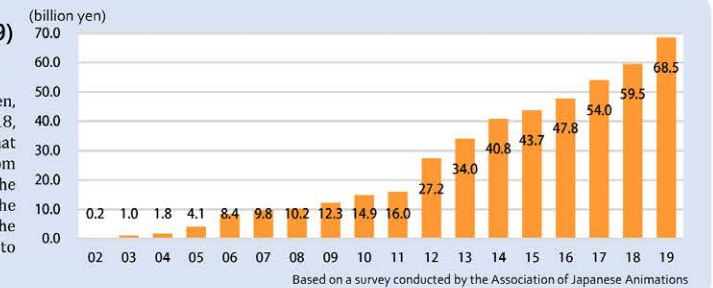


Based on a survey conducted by the Association of Japanese Animations

### Animation Distribution via the Internet (2002-2019)

Market is strong due to the expansion of streaming services.

In 2019, the sales arising from the domestic online streaming market recorded 68.5 billion yen, 115.1% of the previous year. The category, which first exceeded the videogram market in 2018, further widened the gap in 2019. The growth was attributed to a dramatic increase of revenue that animation studios received from online platforms (21.6 billion yen in 2019). Revenue from streaming services has been on rise since this survey started, but in 2019, the growth rate of the revenue from online streaming suddenly shot up (146.9% over the previous year). The factors of the growth were the increase of licences acquired, the expansion of the online streaming market, and the increase of orders for original works exclusive to certain platforms, such as Netflix. It's necessary to pay further attention to the movement of those platforms.



Based on a survey conducted by the Association of Japanese Animations

### Animation videograms (2000-2019)

※Revenues of Videogram are calculated based on the total sales of Japanese animation for adults and Japanese animation for children among the genres in the report by the Japan Video Software Association.

#### Modest fall in the anime idol market following 6 years of straight decline.

In 2019, the sales arising from the Japanese videogram market recorded 58.7 billion yen, a decrease of 4.1% compared to the previous year. It was a minor decrease rate compared to 23.3% recorded in 2018. The main cause of the decline was the development of streaming services. Along with the diffusion of streaming platforms, online streaming took the place of videograms as an alternative medium, satisfying a large part of people's need for works not broadcasted in their regions. Also, the sales arising from rental videos, which occupied the biggest portion of the videogram market, remained stagnant due to the decrease in the number of video stores. On the other hand, the sales of videograms for popular idol anime series such as Love Live! and Idol Master remained the same, as they are seen as collectibles.



Based on a report by Japan Video Software Association

### Merchandising Related to Animation (2000-2019)

※Revenues arising only from Japanese animation characters ranked in the top 100 characters selling well in Japan were tallied.  
 ※No uses of advertisement, promotion, or Pachinko are included.  
 ※The values from 2007 to 2013 are recounted in 2014.

#### The market took an upward turn that was triggered by popular characters.

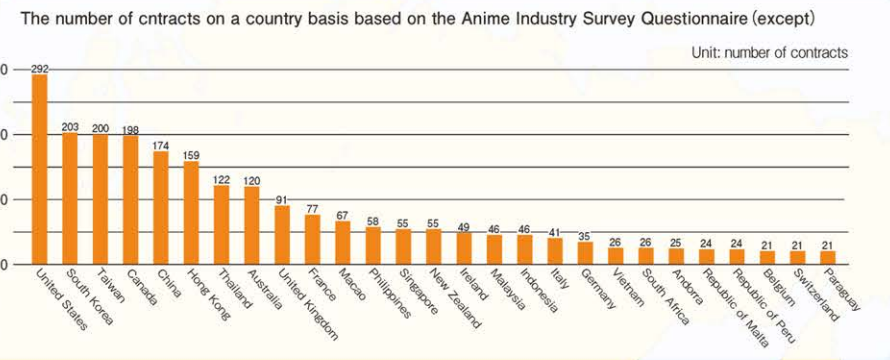
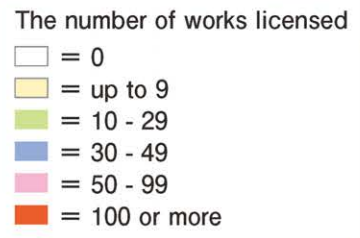
In 2019, the Japanese animation merchandising market, which had been shrinking continuously since 2014, took an upward turn and recorded 581.3 billion yen. This was an increase of 116.2% compared to the previous year. Taking into consideration that the figure did not include the sales arising from game apps for smartphones (estimated at 400 billion yen), the actual market size would be around 1 trillion yen. The emergence of Rilakkuma, Sumikko Gurashi and Demon Slayer, which became a social phenomenon, brought about a significant impact on the market. Those works were turned into animations in 2019 and were widely supported not only by preschoolers but also by their parents' generation, thus causing them to lead the market.



Calculated by the Association of Japanese Animations based on the data from "CharaBiz DATA" (2001-2017)



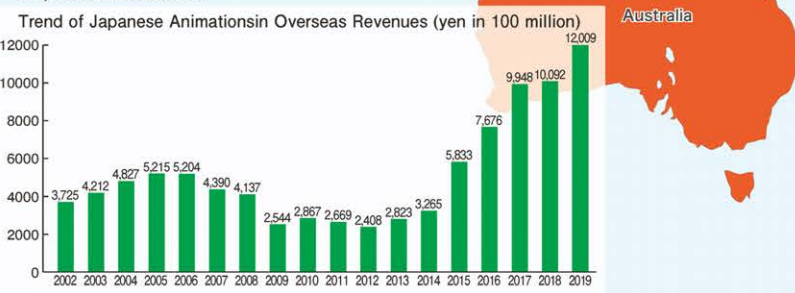
# Japanese Animation in Overseas Markets (2020 version)



**The number of contracts across the worldwide market increased. The profits from the overseas market account for half of the Japanese animation industry.**

In accordance with the response from 16 companies to the survey (16 companies were also surveyed in 2018), a total of 3,822 new contracts were concluded in the overseas market in 2019 (up from 2,594 in 2018). Looking at the regional/national breakdown, North America took the biggest slice of the pie, followed by Korea, Taiwan, Canada, and those five nations made up 33.2% of the total number of contracts. Also, the contracts that applied to all territories worldwide were 272 (up from 38 in 2018), a significant increase that made up 40% of all contracts under "Other." While the rapid growth in the Chinese market from the previous few years was not seen in 2019, the number of global contracts, likely those with global internet platforms, definitely increased. On a regional/national basis, safe and secure markets, including developed countries and parts of Asia, were targeted.

As such, the size of overseas markets recorded 1.2009 trillion yen, an increase of about 20%, and makes up 49.5% — almost half — of the Japanese animation market. Thanks to proactive approaches by US major players to acquire animation IPs as well as diversified profit collection models like game applications in the overseas market, it is certain that the size of the overseas market will continue to grow from now on.



**Top 10 animation works in overseas music royalties in the last 3 year**

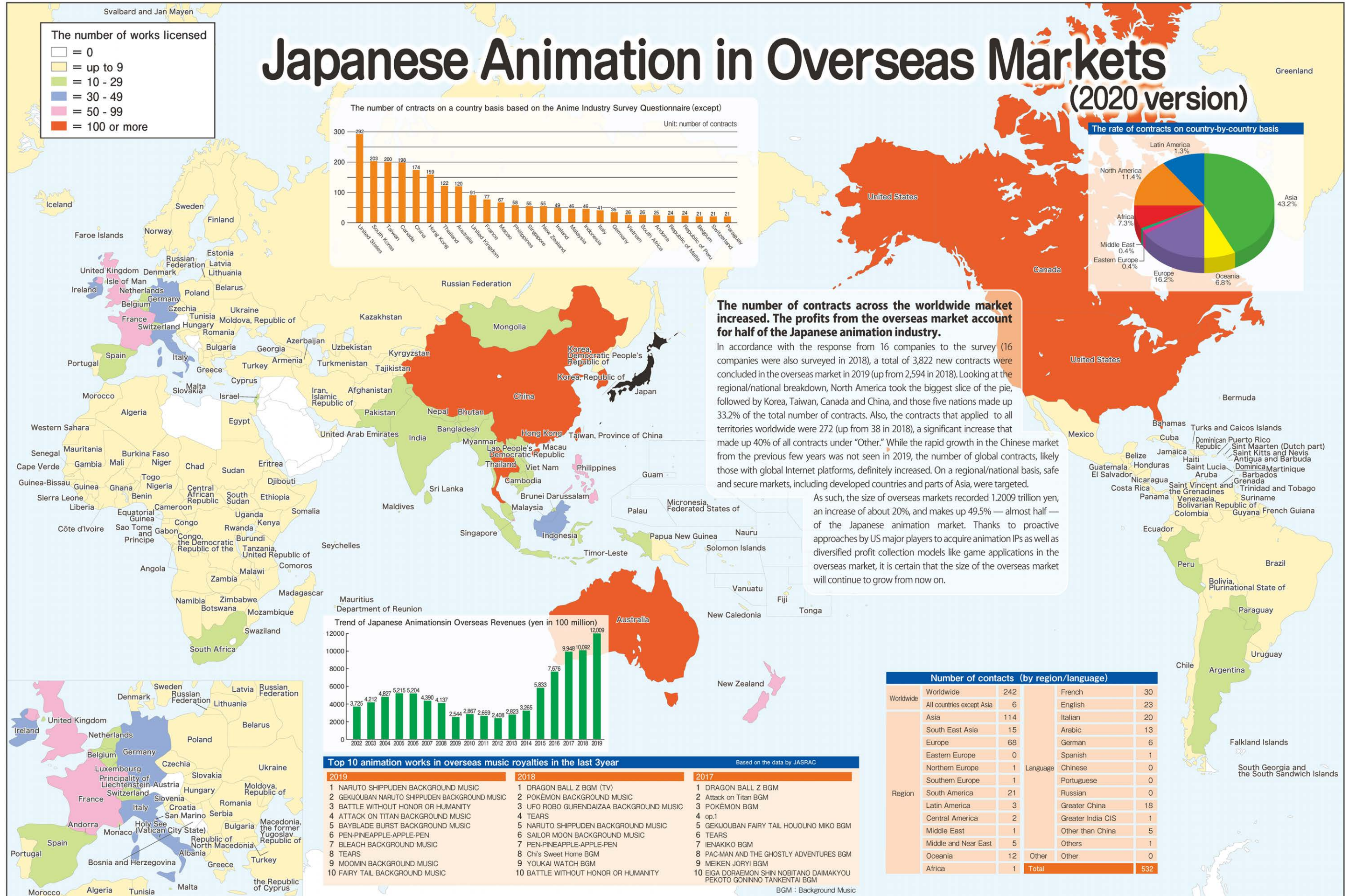
Based on the data by JASRAC

Year	Rank	Work
2019	1	NARUTO SHIPPUDEN BACKGROUND MUSIC
	2	GEKIJOBAN NARUTO SHIPPUDEN BACKGROUND MUSIC
	3	BATTLE WITHOUT HONOR OR HUMANITY
	4	ATTACK ON TITAN BACKGROUND MUSIC
	5	BAYBLADE BURST BACKGROUND MUSIC
	6	PEN-PINEAPPLE-APPLE-PEN
	7	BLEACH BACKGROUND MUSIC
	8	TEARS
	9	MOOMIN BACKGROUND MUSIC
	10	FAIRY TAIL BACKGROUND MUSIC
2018	1	DRAGON BALL Z BGM (TV)
	2	POKEMON BACKGROUND MUSIC
	3	UFO ROBO GURENDAIZAA BACKGROUND MUSIC
	4	TEARS
	5	NARUTO SHIPPUDEN BACKGROUND MUSIC
	6	SAILOR MOON BACKGROUND MUSIC
	7	PEN-PINEAPPLE-APPLE-PEN
	8	Chi's Sweet Home BGM
	9	YOUKAI WATCH BGM
	10	BATTLE WITHOUT HONOR OR HUMANITY
2017	1	DRAGON BALL Z BGM
	2	Attack on Titan BGM
	3	POKEMON BGM
	4	op.1
	5	GEKIJOBAN FAIRY TAIL HOUOUNO MIKO BGM
	6	TEARS
	7	IENAKIKO BGM
	8	PAC-MAN AND THE GHOSTLY ADVENTURES BGM
	9	MEIKEN JORYI BGM
	10	EIGA DORAEMON SHIN NOBITANO DAIMAKYOU PEKOTO GONINNO TANKENTAI BGM

BGM : Background Music

**Number of contacts (by region/language)**

Region	Number of Contacts	Language	Number of Contacts
Worldwide	242	French	30
All countries except Asia	6	English	23
Asia	114	Italian	20
South East Asia	15	Arabic	13
Europe	68	German	6
Eastern Europe	0	Spanish	1
Northern Europe	1	Chinese	0
Southern Europe	1	Portuguese	0
South America	21	Russian	0
Latin America	3	Greater China	18
Central America	2	Greater India CIS	1
Middle East	1	Other than China	5
Middle and Near East	5	Others	1
Oceania	12	Other	0
Africa	1	Total	532



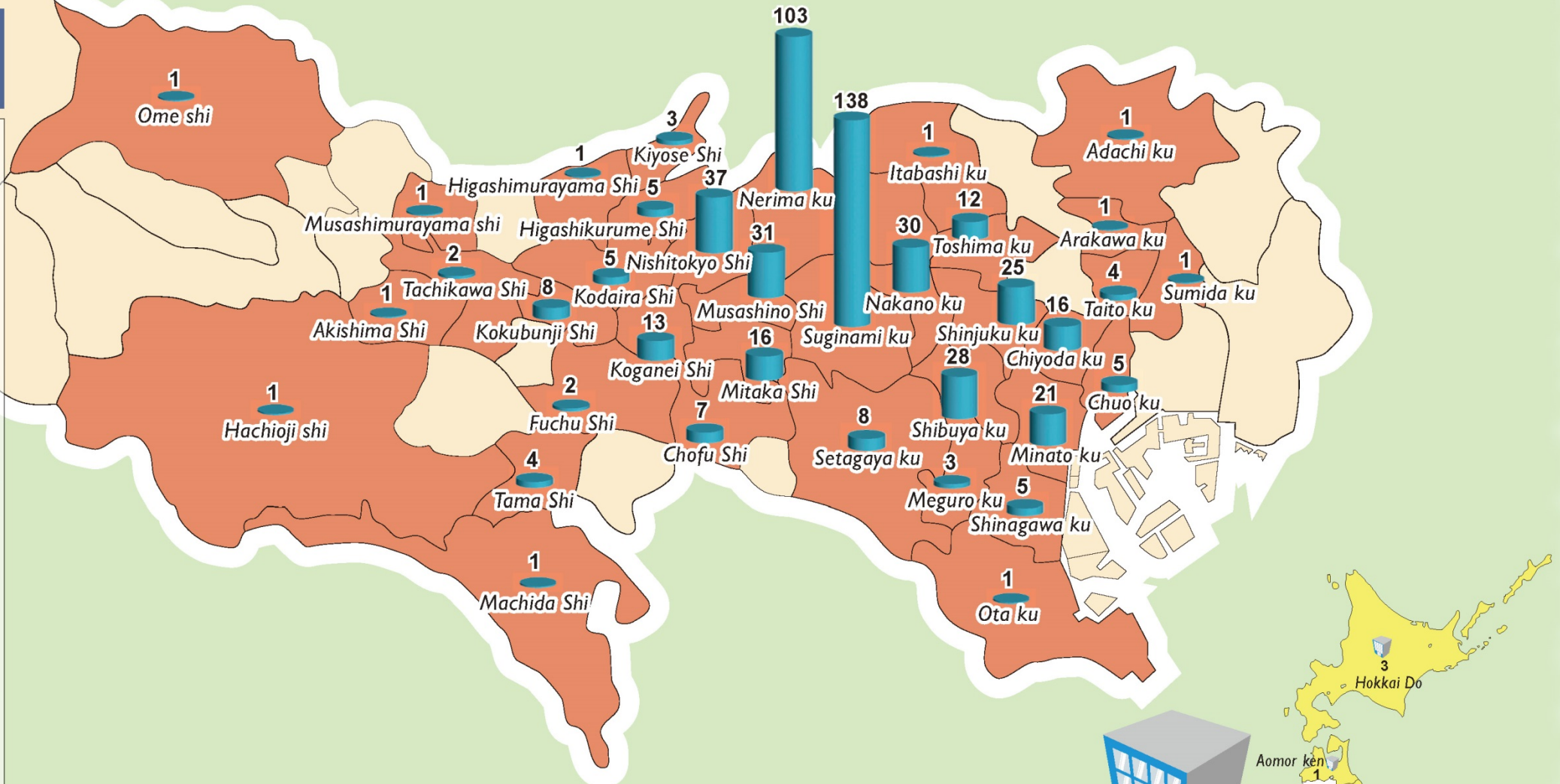


# Distribution of Japanese animation studios (2016 version)

\* 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 animation industry market expanded continuously, marking a record high of 2.5112 trillion yen (115.1% of the previous year). The strong growth continued in Overseas, Merchandise Sales, Pachinko, and more.

# Anime Industry Report 2020

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

In 2019, the size of the continuously expanding animation market reached 2.5112 trillion yen (115.1% of the previous year), thus recording the most sales for 7 consecutive years. The growth was attributed to Movies, which recorded the highest sales of 69.2 billion yen (162.4% of the previous year); Streaming, which also recorded the highest sales of 68.5 billion, continuously breaking its own record each year (115.1% of the previous year); and Live Entertainment, which recorded 84.4 billion yen (109.0% of the previous year). But the main factor was the strong growth of the top three categories: Overseas Sales (1.2009 trillion yen, 119.0% of the previous year), Merchandise Sales (581.3 billion yen, 116.2% of the previous year), and Pachinko (319.9 billion yen, 112.8% of the previous year).

## ■Outline

<b>【Title】</b>	Anime Industry Report 2020
<b>【Publisher】</b>	The Association of Japanese Animations
<b>【Release day】</b>	November 30, 2020
<b>【Size/Pages】</b>	A4 / 108P (Report), + 4 chart sheets inserted+ All Animation Works Perfect Data(Online)
<b>【Price】</b>	10,000 yen (tax excluded)
<b>【Index】</b>	

### 1. Overview of the Japanese animation industry in 2019

\*Overall market trends and notable trends of the industry

### 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 the overseas market

\*Japanese animations in the global market

### 4. Special topic ※The global effect of COVID-19 on Japanese animations

(Electronic Edition) Materials, All Animation Works Perfect Data \*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, Distribution Map of Japanese Animation Studios

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