

Anime Industry Report 2021

Summary

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The Association of Japanese Animations

In 2020, the Anime Industry Took a Direct Hit from COVID-19

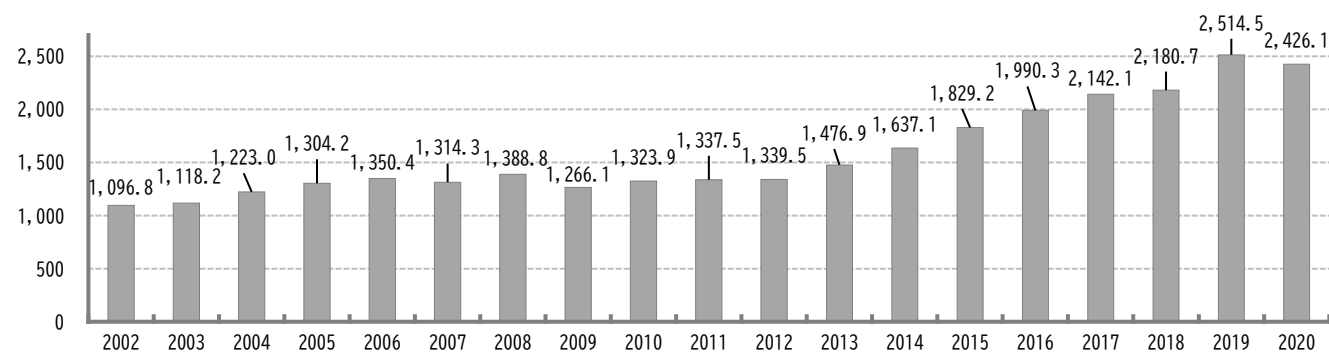
What happened to the anime industry after a direct hit from COVID-19 in 2020? The industry had been growing for ten years straight since 2010, but the difficult restrictions brought about from the state of emergency affected both anime businesses and production studios.

Trends in the Anime Industry Market Due to COVID-19

〈The anime industry market reached 2.4 trillion yen, 96.5% of the previous year, due to COVID-19.〉

The anime industry market, which had been growing for ten years straight, received a direct hit from COVID-19 in 2020. The anime industry market in 2020 was 96.5% of the previous year, which is 88.4 billion yen less, for a total of 2.426 trillion yen. Of the nine windows that the anime industry market is made up of, seven (excluding Streaming and International) reported lower profits than the year before and overall reported a loss of 3.5%. It can be said that the anime industry was not overly affected by the pandemic. It was thought that the anime movie industry would have been greatly affected by the closures of movie theaters and restricted admission limits, but due to the unprecedented hit of Demon Slayer The Movie - Mugen Train, the anime movie industry was able to keep losses to 10.8% of the previous year. Merchandising, which takes up 1/4th of the entire market share, stayed close to stable at 99.2% of the previous year, while International, which is 1/2th of the market share, grew slightly to 103.2% of the previous year. This means the overall anime industry market stayed at 96.5% of the previous year.

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



[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	1,096.8	1,118.2	1,223.0	1,304.2	1,350.4	1,314.3	1,388.8	1,266.1	1,323.9	1,337.5

item	2012	2013	2014	2015	2016	2017	2018	2019	2020	YoY
①TV	96.0	102.7	111.6	107.3	105.6	106.1	113.7	94.8	83.9	88.5%
②Movie	40.9	47.0	41.7	47.7	66.3	41.0	42.6	69.2	61.7	89.2%
③Video	105.9	115.3	102.1	92.8	78.8	76.5	58.7	56.3	46.6	82.8%
④Internet Distribution	27.2	34.0	40.8	43.7	47.8	54.0	59.5	68.5	93.0	135.8%
⑤Merchandising	573.2	598.5	655.2	579.4	552.2	503.7	500.3	586.8	581.9	99.2%
⑥Music	28.3	29.6	29.2	32.4	36.9	34.4	35.8	33.7	27.6	81.9%
⑦Overseas	240.8	282.3	326.6	583.4	767.7	994.8	1009.2	1200.9	1239.4	103.2%
⑧The Pachinko and the like	227.2	242.7	298.1	294.1	281.8	268.7	283.5	319.9	263.0	82.2%
⑨Live Entertainment	-	24.8	31.8	48.4	53.2	62.9	77.4	84.4	29.0	34.4%
Total	1,339.5	1,476.9	1,637.1	1,829.2	1,990.3	2,142.1	2,180.7	2,514.5	2,426.1	1,339.5

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

Topics in the Japanese Animation Industry from 2020 to 2021

〈The Avid Demands and Market Decline Regarding Anime〉

Though the anime industry market declined in 2020, it does not mean that the demands for anime have declined. According to surveys done on anime studios, the demand for anime production is increasing. While the effects of the COVID-19 pandemic have doubtlessly had an influence, there is no record of that being the conclusive reason for the decline from the previous year. "As streaming standards improve, there is a continued expectation for orders." "More titles are being produced throughout the whole anime industry." "Both the titles and production companies are increasing." "Orders for titles to be produced continue to increase, so we can expect a favorable situation." "It hasn't changed very much from how it always has been, but we have offers to produce titles into the distant future, so we're grateful for the work." The surveys received comments like these on the production numbers. Other comments referred to the rise in production costs, with some answers saying that profits are going up due to the increase of titles in production and production costs. "We can expect production costs to go up as streaming and related businesses continue to expand." "Profits are going up as production budgets are rising." "Because the number of projects that make it to production is increasing, so are production costs." "The production budgets have increased this year, just as they had last year." However, in reality, profits are decreasing.

〈The Relationship Between the Schedule Delays and Profits〉

The reasons given for the decrease in profits in 2020 in the surveys are as follows.

"Because of COVID-19, it was difficult to predict when the products would be finished, and we suffered delays beyond our original schedule."

“We had to create an environment for work-from-home, and there were delays in the production schedule.”

“Most titles had their schedules delayed. We were unable to prepare for next year’s titles, so those schedules are delayed as well.”

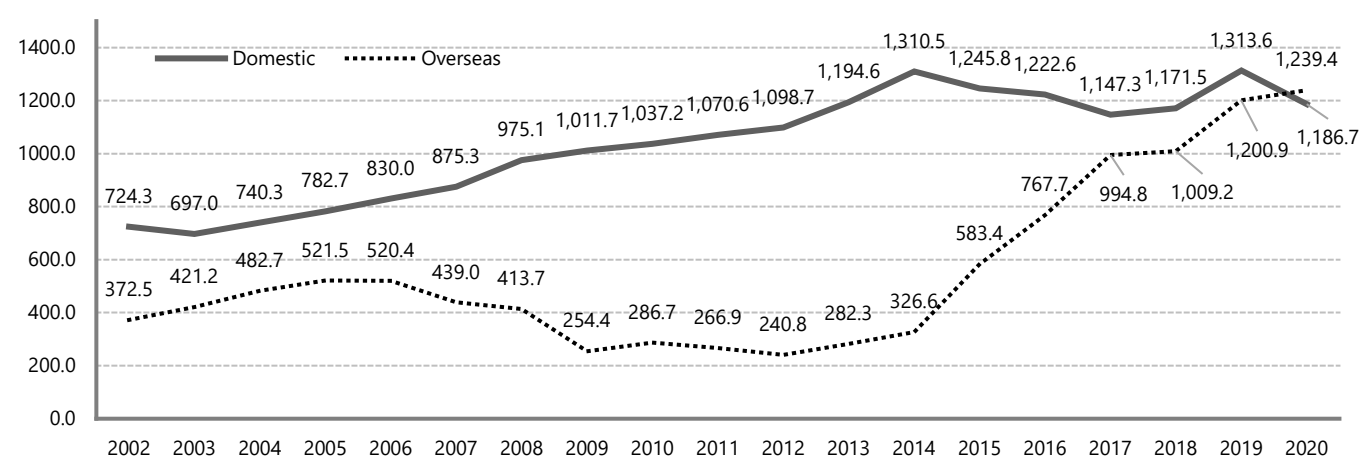
When we look at these answers, we can see that despite the avid demand for content and the rise in production expenditure, profits were decreased due to schedule delays caused by the COVID-19 pandemic, meaning that there were also delays in payments. When anime for both TV and movies are delayed, it affects not just the Television and Movie fields but also Home Video and Streaming. According to the survey, “Because there were no new titles since last year, we can expect that domestic profits, especially for streaming, will decrease. If only old titles are available, profits will decrease no matter what.” Despite the fact that the streaming market (total profits) have greatly increased to 135.8% of last year, including older titles, the income of anime studios from the streaming industry market decreased precisely because there were fewer new titles. Although the industry’s market sentiment was the same as the previous years, numbers dropped because schedule delays led to payment delays.

〈The Domestic and International Markets Have Finally Turned the Tables〉

In 2020, the international market finally overtook the domestic market. The domestic market reported profits of 1.186 trillion yen, which was 90.3% of the previous year, while the international market reported 1.239 trillion yen, 103.2% of the previous year. The international market has been rapidly growing since 2015, and it was thought that it would overtake the domestic market in 2019, but as the domestic market was also growing, those predictions came true a year later than expected. However, the difference between the domestic and international markets was only 52.7 billion yen, and it is also affected by the COVID-19 pandemic, so it is worth keeping an eye on the market’s future.

Application games can be seen as having affected the growth of the international market even during the COVID-19 pandemic. The survey did not touch on the international market, but the Toei Animation March 2021 financial statements on their international copyrights included references to how app games based on titles such as the Dragonball series in the US and Slam Dunk in Asia have been increasing their profits due to a favorable response. It is estimated that the international sales profits of the online game market based on anime or manga comics will continue to rise.

[Figure 3] Comparison of Domestic and International Anime Markets (Broad Anime Market/Units of Hundred Million Yen)

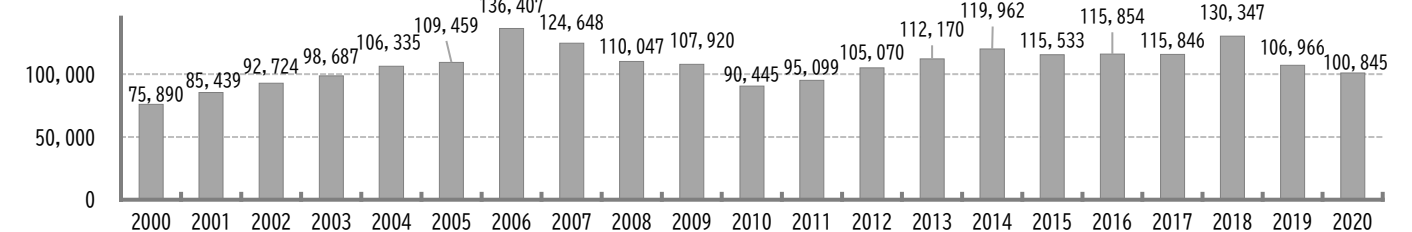


Based on questionnaires conducted by the Association of Japanese Animations
 ※The annual average rate of Principal Global Indicators is adopted as the exchange rate.

〈The Number of Minutes Produced of TV Anime Continues to Fall, Reaching 100,845 Minutes, 94.3% of the Previous Year〉

The “staple food” of the Japanese anime industry is television anime. In 2020, the number of minutes produced of TV anime was 100,845 minutes, 94.3% of the previous year. The number of TV anime produced has been growing since the expansion of late-night anime at the end of the 1990s and reached a peak of 136,407 minutes in 2006. However, after that, due to the Home Video market suddenly shrinking drastically after a declining trend, there were only 90,445 minutes produced in 2010, 3/4s of the minutes produced at its peak. Later, the windows of Amusement, International, Streaming, and Live Entertainment made up for the decline in Home Video, and the number of minutes produced once again increased, reaching the market’s #2 record of 130,347 minutes in 2018. But then, in 2019, the numbers dropped drastically to 106,966, 82.1% of the previous year. With the influence of the COVID-19 pandemic in 2020, the number of minutes produced once again dropped. However, it is believed that the number of minutes produced will recover once the COVID-19 pandemic is over.

[Figure 4] Production Minutes of TV Animations



Based on a survey conducted by the Association of Japanese Animations

〈The Effects of COVID-19 Seen in Japan, the US, and China〉

Compare the precise numbers of the box-office revenue in 2020 for Japan, the US, and China. The graph below features the box-office revenue for all three countries of all movies as well as animation produced in their own countries. It can be seen that the North American market dropped significantly compared to 2019. The box-office revenue of all movies was 210.3 billion yen, 18.6% of the year before, while the box-office revenue for American animation movies reached 31.6 billion yen, 12.8% of the previous year. Next, take a look at China. The overall box office revenue was 321.9 billion yen, 31.4% of the previous year, while Chinese animation movies made 29.1 billion yen, 26.1% of the previous year. Despite Japan’s overall box-office revenue being 143.3 billion yen, 54.9% of the previous year, the Japanese anime box-office revenue reached 61.7 billion yen, 89.1% of the previous year, making it the year with the third-highest revenue in Japanese anime history. However, this is because of the release of Demon Slayer The Movie - Mugen Train, which managed to unseat the immovable Spirited Away from the spot as the top-grossing anime movie of all time.

[Figure 5] Box-Office Revenue of All Movies in Japan, the US, and China in 2020 (billion yen)

Total Box-Office Revenue	2019	2020	Previous Year
Japan	261.2	143.3	54.9%
United States	1,132.1	210.3	18.6%
China	1,024.3	321.9	31.4%

[Figure 6] Box-Office Revenue of Anime Movies Produced in Their Own Country in Japan, the US, and China in 2020 (billion yen)

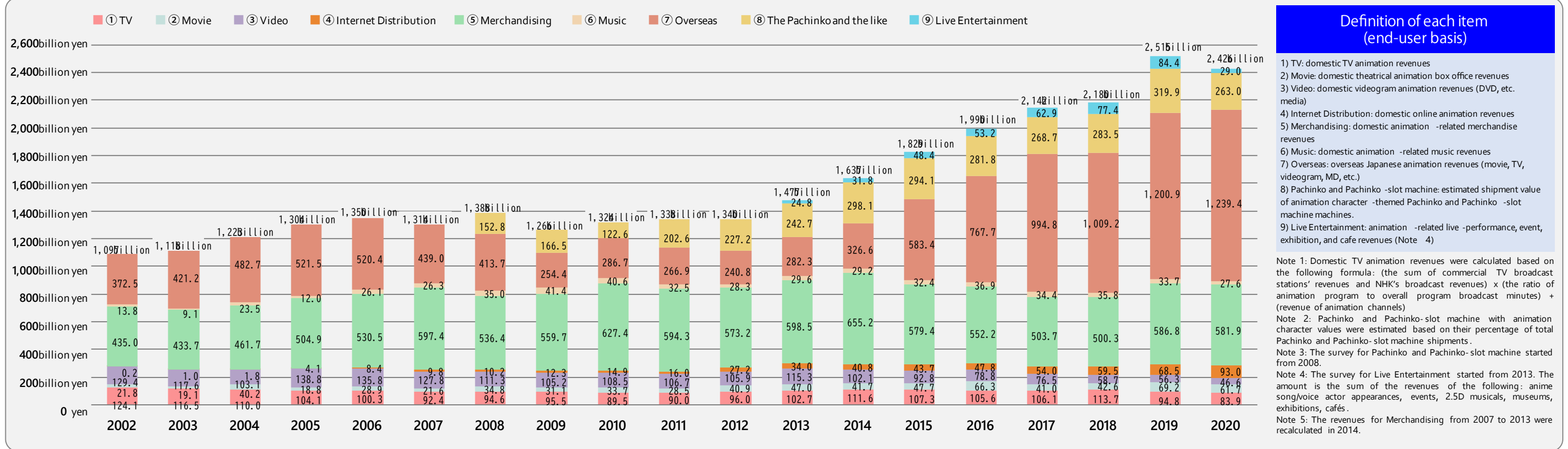
Box-Office Revenue of Anime Movies Produced in Their Own Country	2019	2020	Previous Year
Japan	69.2	61.7	89.1%
United States	246.3	31.6	12.8%
China	111.6	29.1	26.1%

Prepared by the Association of Japanese Animations based on BOX OFFICE MOJO and Maoyan.com

Trends in Japanese Animation Market (2021 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 – 2020>



Definition of each item (end-user basis)

- 1) TV: domestic TV animation revenues
- 2) Movie: domestic theatrical animation box office revenues
- 3) Video: domestic videogram animation revenues (DVD, etc. media)
- 4) Internet Distribution: domestic online animation revenues
- 5) Merchandising: domestic animation-related merchandise revenues
- 6) Music: domestic animation-related music revenues
- 7) Overseas: overseas Japanese animation revenues (movie, TV, videogram, MD, etc.)
- 8) Pachinko and Pachinko-slot machine: estimated shipment value of animation character-themed Pachinko and Pachinko-slot machine machines.
- 9) Live Entertainment: animation-related live-performance, event, exhibition, and cafe revenues (Note 4)

Note 1: Domestic TV animation revenues were calculated based on the following formula: (the sum of commercial TV broadcast stations' revenues and NHK's broadcast revenues) x (the ratio of animation program to overall program broadcast minutes) + (revenue of animation channels)

Note 2: Pachinko and Pachinko-slot machine with animation character values were estimated based on their percentage of total Pachinko and Pachinko-slot machine shipments.

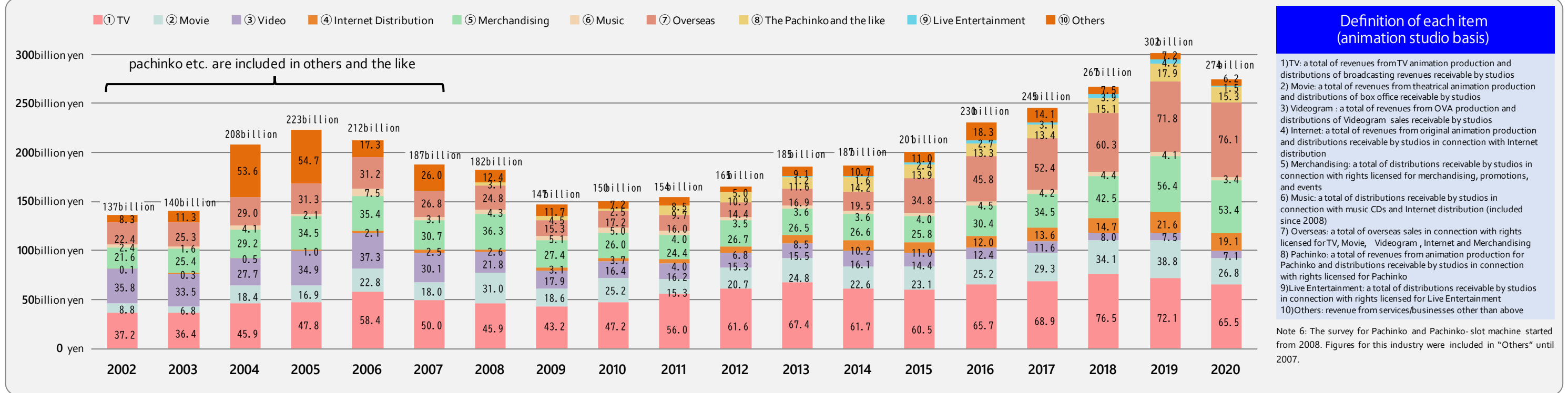
Note 3: The survey for Pachinko and Pachinko-slot machine started from 2008.

Note 4: The survey for Live Entertainment started from 2013. The amount is the sum of the revenues of the following: anime song/voice actor appearances, events, 2.5D musicals, museums, exhibitions, cafés.

Note 5: The revenues for Merchandising from 2007 to 2013 were recalculated in 2014.

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 – 2020>



Definition of each item (animation studio basis)

- 1) TV: a total of revenues from TV animation production and distributions of broadcasting revenues receivable by studios
- 2) Movie: a total of revenues from theatrical animation production and distributions of box office receivable by studios
- 3) Videogram: a total of revenues from OVA production and distributions of Videogram sales receivable by studios
- 4) Internet: a total of revenues from original animation production and distributions receivable by studios in connection with Internet distribution
- 5) Merchandising: a total of distributions receivable by studios in connection with rights licensed for merchandising, promotions, and events
- 6) Music: a total of distributions receivable by studios in connection with music CDs and Internet distribution (included since 2008)
- 7) Overseas: a total of overseas sales in connection with rights licensed for TV, Movie, Videogram, Internet and Merchandising
- 8) Pachinko: a total of revenues from animation production for Pachinko and distributions receivable by studios in connection with rights licensed for Pachinko
- 9) Live Entertainment: a total of distributions receivable by studios in connection with rights licensed for Live Entertainment
- 10) Others: revenue from services/businesses other than above

Note 6: The survey for Pachinko and Pachinko-slot machine started from 2008. Figures for this industry were included in "Others" until 2007.

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

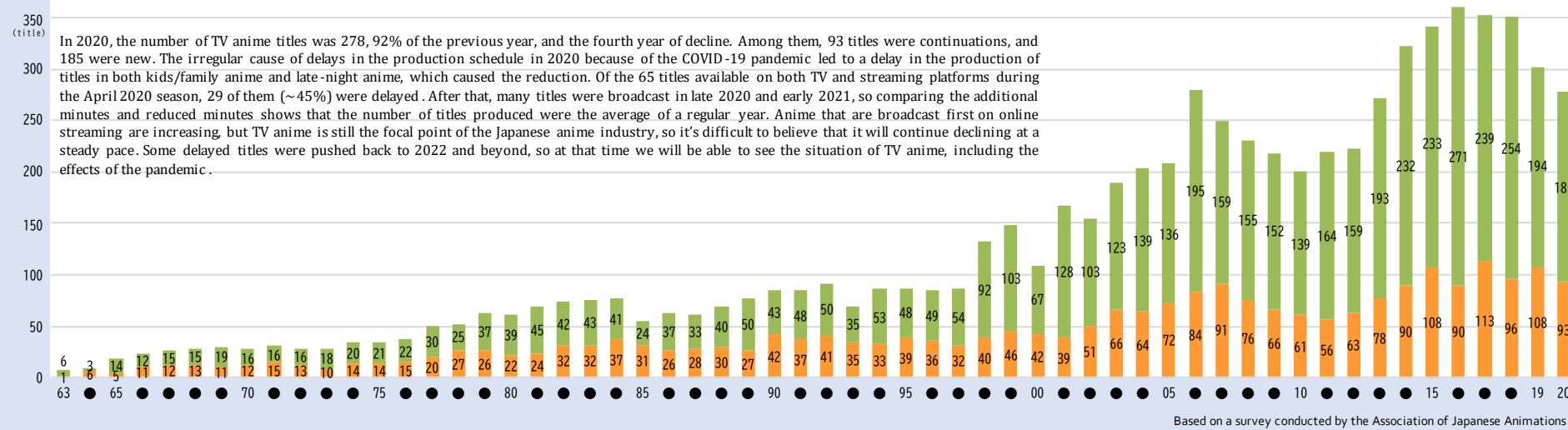
Trends in Japanese Animation Market (2021 version)

The COVID-19 Pandemic Rapidly Shifted the Windows so Streaming Overtook TV Anime

TV Animation programs (963-2020)

Was the reduction in titles due to the delay in broadcasting during the COVID-19 pandemic temporary?

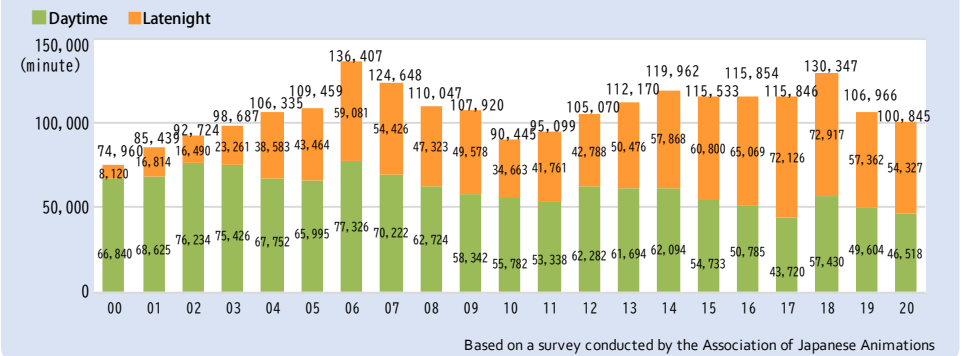
■ TV animation programs newly broadcast in the year.
 ■ TV animation programs broadcast/serialized continuously from the previous years.
 *TV animation programs, animations inserted in other TV programs, and TV animations combined with live-action programs are all covered.
 *The data has been closely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



Production Minutes of TV Animations (2000-2020)

The Minutes of TV Anime Produced Were Reduced Along with the Number of Titles

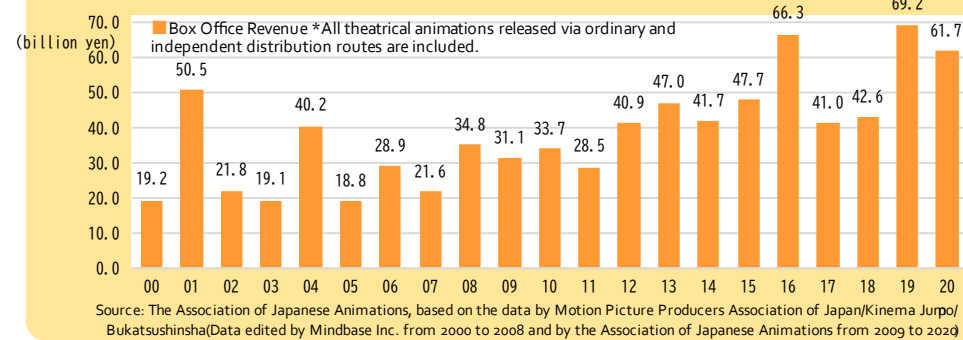
The number of TV anime minutes produced in 2020 was 100,845, 94.3% of the previous year. The number of titles decreased due to the delays in the production schedule caused by the COVID-19 pandemic. The number of minutes of TV anime produced in 2018 reached 130,347 minutes, the second-highest record in Japanese anime history. However, possibly as a reaction to 2019, the market declined greatly to 82.1% and then shrank even further in 2020 due to the pandemic. TV anime are produced a few years in advance of broadcast, so many titles that were scheduled for 2020 were delayed to 2021. Hence, it can be assumed that the number of minutes produced will improve once the pandemic is over.



Box Office Revenue of Theatrical Animations (2000-2020)

Despite the Difficulties of the Pandemic, Demon Slayer Made 2020 the Third Top-Grossing Year in History

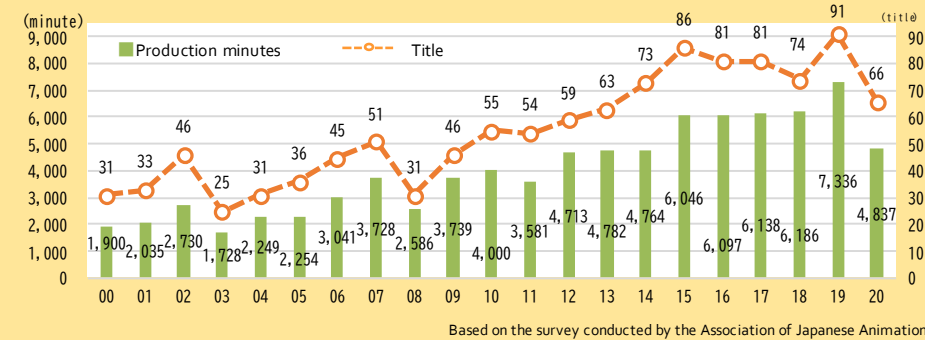
The movie anime revenue in 2020 was 61.7 billion yen. It was a difficult year due to the delays in releases, closures of theaters, change in business hours, and limits on audience numbers, all caused by the COVID-19 pandemic. However, it still ultimately became the third top-grossing year in history. The driving force behind it was Demon Slayer the Movie - Mugen Train, which grossed 38.7 billion yen by the end of December 2020 and over 40 billion yen in 2021, and broke the record for the highest grossing movie for the first time in 19 years. The revenue from Demon Slayer the Movie is over half of the total revenue of the anime film market and more than a quarter of the total film market overall. Otherwise, only eight movies broke 1 billion yen, down from 16 the year before, making 2020 a year supported by Demon Slayer the Movie throughout the difficulties of the COVID-19 pandemic.



The Number of Theatrical Animation Works and the Production Minutes (2000-2020)

Release Delays Reduced Production Minutes and Numbers of Titles

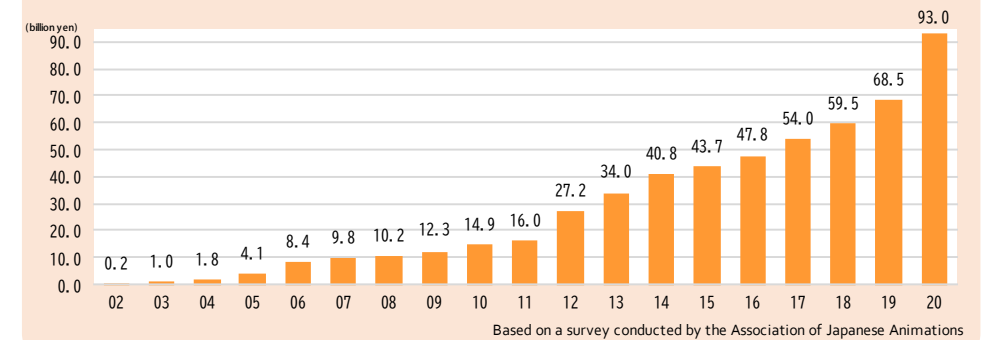
In 2020, the number of film anime produced was 66, the lowest since 2013, and the number of minutes produced declined drastically to 4,837 minutes, 66% of the previous year. Part of the reason is that multiple titles had their release delayed due to the COVID-19 pandemic. Many titles had their release date pushed past 2020 due to production delays, the closure and shortened business hours of theaters, the limits of audience numbers, and the reduction of foot traffic due to the government-induced state of emergency. While some titles that were delayed to 2021, like Detective Conan: The Scarlet Bullet and Evangelion 3.0+1.0 Thrice Upon a Time, became hits, some titles suffered a revenue decline compared to an average year. Part of that is because it was difficult to have developments such as TV broadcasts of anime films, which is one of their strong points in marketing, or other similar collaboration campaigns.



Animation Distribution via the Internet (2002-2020)

The Shift of the Streaming Window Overtaking the TV Anime Market is Striking

In 2020, there was a sudden rise in domestic anime streaming revenue to 93 billion, 135.8% of the previous year. The gap between Streaming and Home Video widened even further after Streaming overtook Home Video in 2018, and it also surpassed the TV anime market in 2020 after the latter dwindled due to the COVID-19 pandemic. The demands for people to stay at home caused the viewers to shift to Streaming, and it is expected that that trend will continue to increase rapidly. On the other hand, the revenue of anime production companies from Streaming has been growing since 2010, but it declined to 19 billion 100 million yen (88.4% of the previous year) in 2020.

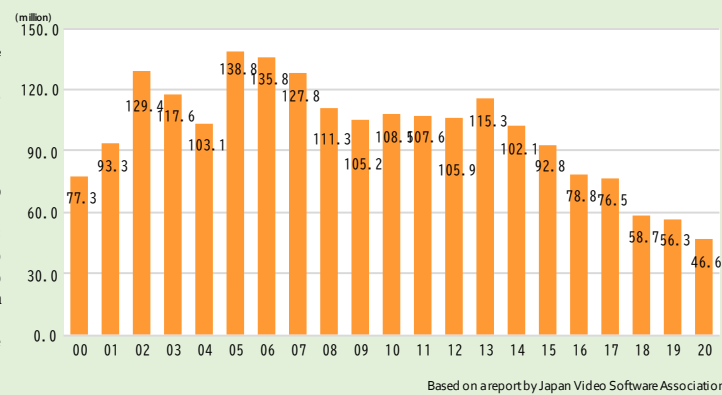


Animation videograms (2000-2020)

※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.

A Decline for the Seventh Year in a Row; Is the Demand for Streaming Services as People Stay at Home Part of the Cause?

In 2020, the sales revenue for Japanese anime video packages was 46.6 billion yen, 82.7% of the previous year. The viewer shift to Streaming on online services due to people staying home was a major factor. On top of that, video packages often had perks such as collaboration campaigns with events or other plans, but those plans were unable to develop smoothly due to the COVID-19 pandemic. Anime about idols had taken the top ranks of video package sales in 2019, but due to the lack of events, the number of titles in the top in 2020 decreased. Hit titles that reached large audiences like Demon Slayer and Weathering With You as well as titles connected to smartphone games instead filled the top ranks.

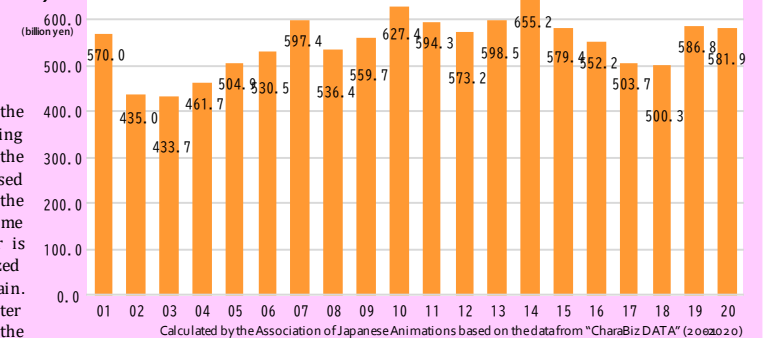


Merchandising Related to Animation (2000-2020)

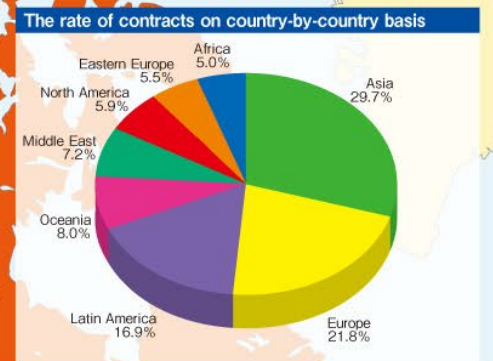
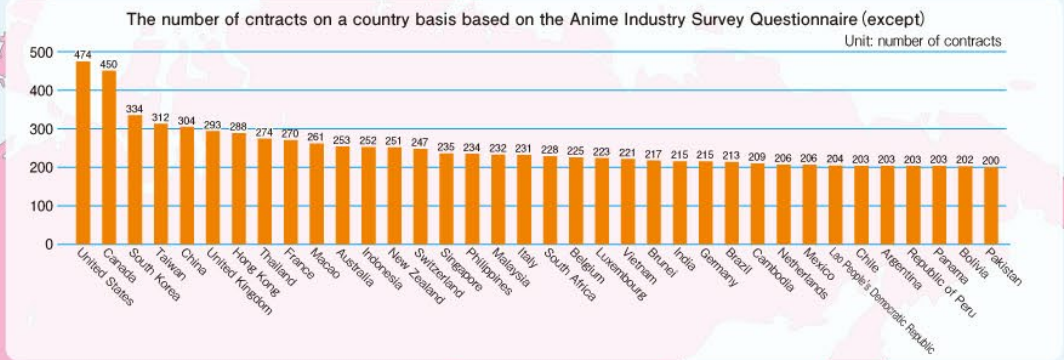
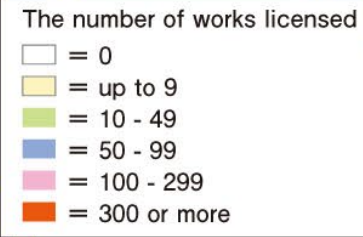
※Revenues arising only from Japanese animation characters ranked in the top 100 characters selling well in Japan were tallied.
 ※No uses of advertisement, promotion, or Pachinko are included.
 ※The values from 2007 to 2013 are recounted in 2014.

Demon Slayer Maintains the Market Average from the Previous Year

The state of emergency called for during the COVID-19 pandemic greatly affected the character merchandising market. This was due to the closure of retail shops specializing in items other than daily necessities and the cancellation of events. However, despite the difficult situation, the Japanese anime character merchandising market in 2020 grossed 581.9 billion yen, 99.2% of the previous year's revenue, thus mostly keeping up with the previous year. The expansion of the e-commerce market due to people staying at home along with the explosive hit of Demon Slayer are two major influences. Demon Slayer is supported by a wide variety of people, from very small children to adults, and maximized the market ahead of the October 2020 release of Demon Slayer the Movie - Mugen Train. As a late-night anime propped up by such a large audience, the anime character merchandise market is also losing the demarcation between core fans and the kids/family demographic.

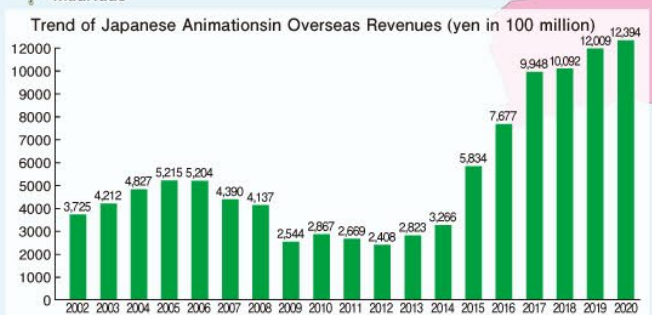


Japanese Animation in Overseas Markets (2021 version)



The Global Streaming Market Grew and the International Market Surpassed the Domestic Market

In 2020, the number of companies that said they had international contracts was 28, up drastically from 16 companies the year before. The number of contracts increased five times to 16,361 from 3,822 the previous year, and a shift in strategy where studios with big libraries sign individual contracts for all of their titles can be seen. The top countries with contracts are the United States at 474, Canada at 450, South Korea at 334, Taiwan at 312, and China at 304. In 2020, the international market grew to 1.239 trillion yen, 103.2% of the previous year, which topped out at 1.2 trillion yen. Since the domestic market only grossed 1.186 trillion yen in 2020 due to the COVID-19 pandemic, the international market finally surpassed it. During the pandemic, VoD services grew globally, and the "rediscovery" of anime marketed at adults, available on the market is making international revenue grow favorably.



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

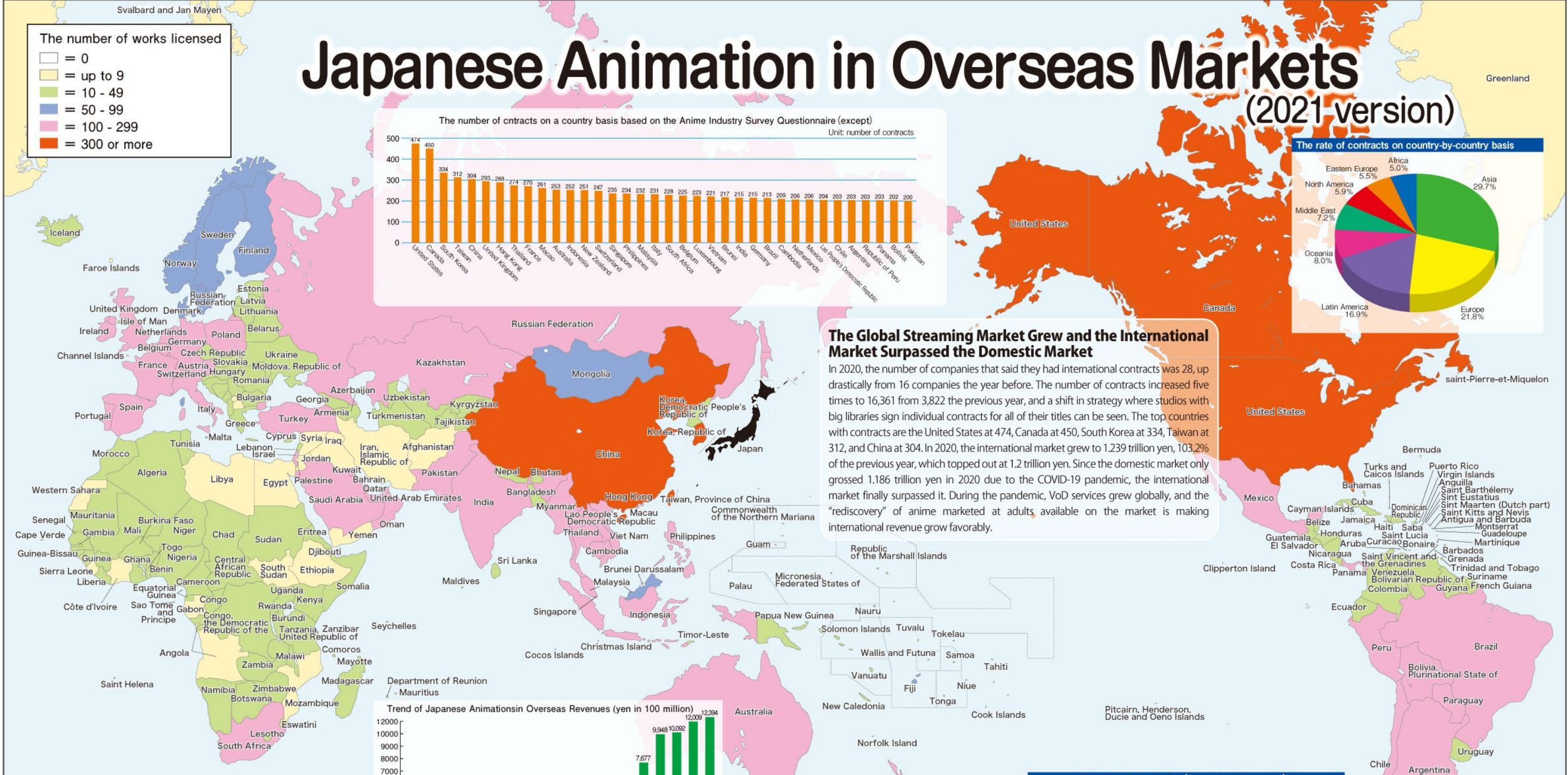
Based on the data by JASRAC

Year	Rank	Work
2019	1	NARUTO SHIPPUDEN BACKGROUND MUSIC
	2	BATTLE WITHOUT HONOR OR HUMANITY
	3	BLEACH BACKGROUND MUSIC
	4	MOOMIN BACKGROUND MUSIC
	5	NARUTO BACKGROUND MUSIC
	6	ONE PUNCH-MAN BACKGROUND MUSIC
	7	BEYBLADE BURST BACKGROUND MUSIC
	8	TEARS
	9	GEKJUBAN NARUTO SHIPPUDEN BACKGROUND MUSIC
	10	NANATSU NO TAIZAI BACKGROUND MUSIC
2018	1	NARUTO SHIPPUDEN BACKGROUND MUSIC
	2	GEKJUBAN 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
2017	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

BGM : Background Music

Number of contacts (by region/language)

Region	Number of Contacts	Language	Number of Contacts
Worldwide	124	French	27
All countries except Asia	5	English	12
Asia	46	Italian	7
South East Asia	4	Arabic	0
Europe	43	German	22
Eastern Europe	0	Spanish	0
Northern Europe	2	Chinese	0
Southern Europe	0	Portuguese	0
Latin America	9	Russian	0
South America	0	Greater China	1
Central America	0	Greater India	0
Middle East	3	CIS	5
Middle and Near East	4	Antarctic	1
Oceania	26	Other	0
Africa	2	Total	343

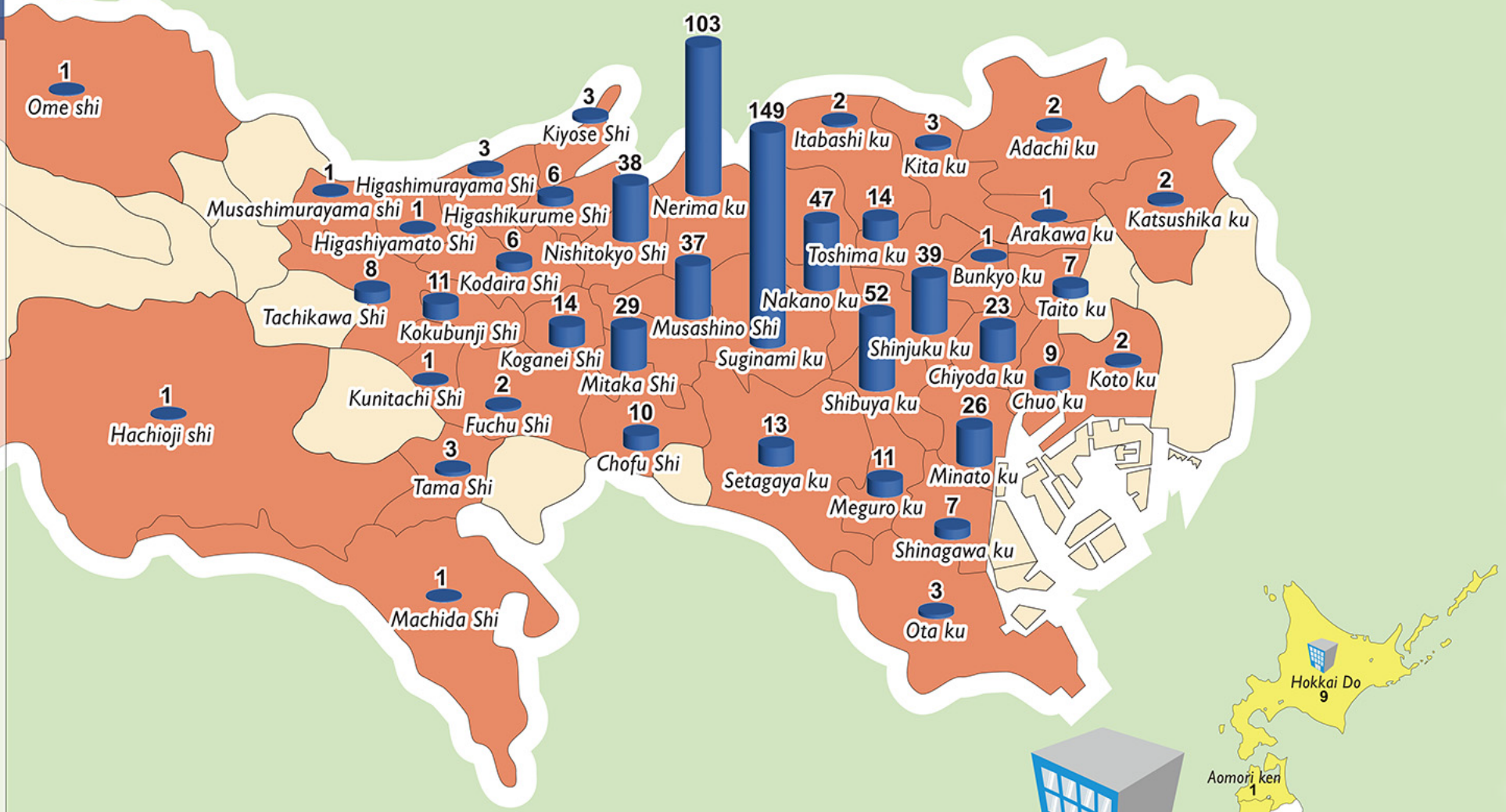


Distribution of Japanese animation studios (2020 version)

* 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.
 * Headquarters locations are listed, other studios are not included.

The Distribution of Anime Production Studios in Tokyo

In 2020, there were a total of 811 companies involved in anime production (planning/production, script, direction, key animation, in-betweens, CG (2D and 3D), coloring, backgrounds/art, special effects, filming, editing, and other parts of the production process). This is 189 companies more than the survey done in 2016 (622 companies) and 392 companies more than 2011 (419 companies). 692 companies, or 85.3% of the total, were in Tokyo, but this is a reduction from 87.3% in 2011 and 87.1% in 2016. Regarding the locations of the studios, 149 companies are in Suginami-ku, 103 in Nerima-ku, 52 in Shibuya-ku, and 47 in Nakano-ku, so it is clear that anime production companies are concentrated in the Suginami and Nerima areas. The three original anime production companies, Toei Doga (now Toei Animation), the original Mushi Production, Tatsunoko Production (now Tatsunoko Pro), along with Tokyo Movie (Now TMS Entertainment), have been in existence since the beginning of TV anime history. These companies were established along the Seibu Ikebukuro Line, the Seibu Shinjuku Line, and the Chuo Line, resulting in anime production companies gathering in the Suginami and Nerima areas of west Tokyo. On the other hand, CG companies are growing in number in Shibuya-ku, so as processes that were once hand-drawn are increasingly being done with CG, companies that mostly did CG production for other industries like video games, live films, and amusement establishments are now participating in anime production. Thus, more CG companies connected to anime companies are being established, and they are being located in the urban subcenter of Shibuya-ku.



Anime Production Continues to Move Out of Tokyo

The heavy concentration of anime production companies in Tokyo is receding slightly as some are beginning to leave the city. One of the reasons is the goal of each company to hire more human resources. One of the chronic problems of anime production is the lack of human resources, and one of the causes is that the industrial structure of having companies concentrated in Tokyo made it difficult for people outside of Tokyo to find employment in the industry. However, in recent years, many anime production companies are being established outside of Tokyo and often link up with regional educational facilities to teach students and offer employment opportunities. Because of that, there is now the option for students to find work at an anime production company in their local region. Also, the digitalization of the production processes is also a crucial reason for anime production companies moving outside Tokyo. Until the 2000s, TV anime was delivered to the networks via tape. The networks were located in Tokyo, so being in Tokyo was a requirement. However, now that processes including delivery have become digitized, there is no need to be situated in Tokyo. These calculations don't include any studios other than the head office, but regional art studios specializing in digital art are increasing in number, and even more CG studios are also being established outside of Tokyo. It can be assumed that as digitalization continues, anime production companies will also continue to be based outside of Tokyo.



Based on the survey by the Association of Japanese Animations

In 2020, the anime industry market stalled at 2.4 trillion yen, 96.5% of the previous year, due to the effects of the COVID-19 pandemic. While many fields declined due to the pandemic, the Streaming window grew rapidly while the International window continued to rise.

Anime Industry Report 2021

Despite the difficulties of the COVID-19 pandemic, the anime industry market grossed 2.4 trillion yen in 2020 (96.5%). When broken down into individual categories, the demand for people to stay at home affected the streaming market, which reached its highest profits ever at 93 billion yen (135.8%), and the international market overtook the domestic market for the first time at 1.2 trillion yen (103.2%). On the other hand, the Live Entertainment window was greatly affected by the pandemic and only made 29 billion yen (34.4%), while the other windows grossed roughly 80-90% of what they did the previous year.

*All percentages in parentheses are comparisons to the previous year.

■Outline

【Title】	Anime Industry Report 2020
【Publisher】	The Association of Japanese Animations
【Release day】	November 4, 2020
【Size/Pages】	A4 / 132P (Report), + 4 chart sheets inserted+ All Animation Works Perfect Data(Online)
【Price】	11,000 yen (tax excluded)
【Index】	

1.Overview of the Japanese animation industry in 2020

*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 Texts The Japanese Anime Industry and Working Styles During/After the COVID-19 Pandemic

*The Effects of the COVID-19 Pandemic on Anime-Related Educational Facilities

*Studio Locations

(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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