

Anime Industry Report 2018

Summary

Authors

| | |
|-------------------|---|
| Hirromichi Masuda | Anime Industry Researcher Auditor, Video Market Corporation |
| Tadashi Sudo | Journalist |
| Kazuo Rikukawa | President, Character Databank, Ltd. Director/Secretary-General, Character Brand Licensing Association |
| Naofumi Ito | Department Director, Content Strategic Planning Office Content Division, ASATSU-DK INC. |
| Yuji Mori | President, Senior Director, Dentsu Consulting Inc. Specially Appointed Professor, Graduate School of Asia University |
| Yasuo Kameyama | Ph.D. Student, Graduate School of Media Design, Keio University senior director of C i P committee |

Editor

| | |
|--|--|
| Hirromichi Masuda (editor in chief) | Anime Industry Researcher Auditor, Video Market Corporation |
| Masahiro Hasegawa | Producer, HUMANMEDIA Inc. |

Cooperation in Material Research

| | |
|--------------|------------------|
| Mitsuru Soda | JuGeMu Co., Ltd. |
|--------------|------------------|

Cooperation in Editing

| | |
|----------------|---|
| Hiroko Uehara | Part-time Lecturer , Japan Electronics College Part-time Lecturer , Shobi University Graduate School |
| Megumi Onouchi | President, HUMANMEDIA Inc. |

January, 2019

The Association of Japanese Animations

The market recorded 108.0% growth and the highest sales in 2017, finally crossing the 2 trillion yen mark driven by overseas sales.

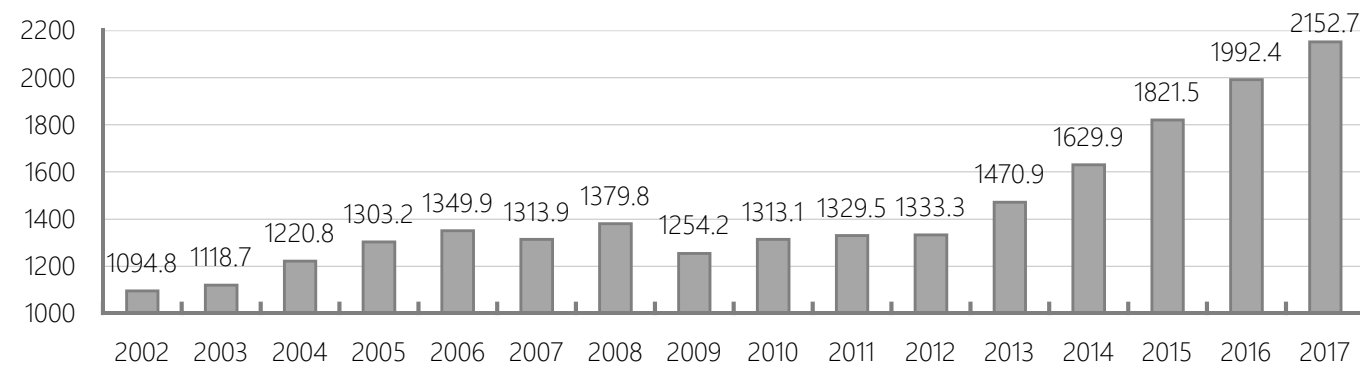
The Japanese animation market, which hit bottom in 2009 and picked up in 2010, recorded growth for 7 consecutive years and reported its highest sales for the fourth consecutive year. The market size finally exceeded 2 trillion yen, which was 110% on a year-by-year basis. Videogram sales shrunk considerably (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.

The Market Size Finally Surpassed 2 Trillion Yen

The year 2017 was the first year* that the Japanese animation market crossed the 2 trillion yen mark (Fig.1). The market recorded 2 trillion 152.7 billion yen in sales, growing for 8 consecutive years, with 5 consecutive years of record-breaking high sales. To break it down by genre, TV (100.9%), Internet Distribution (113%) and Live Entertainment (116%) expanded while five genres (i.e. Movie (61.7%), Videogram (97.1%), Merchandising (93.0%), Music (91.6%) and Pachinko (95.8%)) decreased. Overseas (129.6%) showed strong growth, making up for the decline of those five genres. The ebb and flow of respective genres have become clear compared to when this report was first issued 10 years ago.

Compared to the survey 10 years ago, TV recorded 115.7% growth, reaching its peak in 2015 and remaining steady since then. Movie (193.4%) expanded year by year, Videogram (59.9%) declined unmistakably, and Internet Distribution (551.0%) continued to rise dramatically. Merchandising (87.6%) declined gradually after reaching its peak in 2014, however, it could be assumed that the genre would have grown substantially if the sales arising from businesses not calculated in this survey, such as application games and other digital merchandise, had been covered (note: physical games are already covered in Merchandising). Music (99.2%) reached its peak in 2009 and has remained steady since then. Considering the performance of Videogram, Music, which is a part of packaged products businesses, has been doing miraculously well. Overseas (226.6%) shrunk substantially after reaching its first peak in the mid 2000s. It has surged again since 2015, becoming today's largest genre. Pachinko (175.9%), a new genre from 9 years ago, reached its peak in 2014 and has declined gradually since then. Live Entertainment (251%), also a new genre from 4 years ago, showed considerable growth. *due to error in the 2016 survey

[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

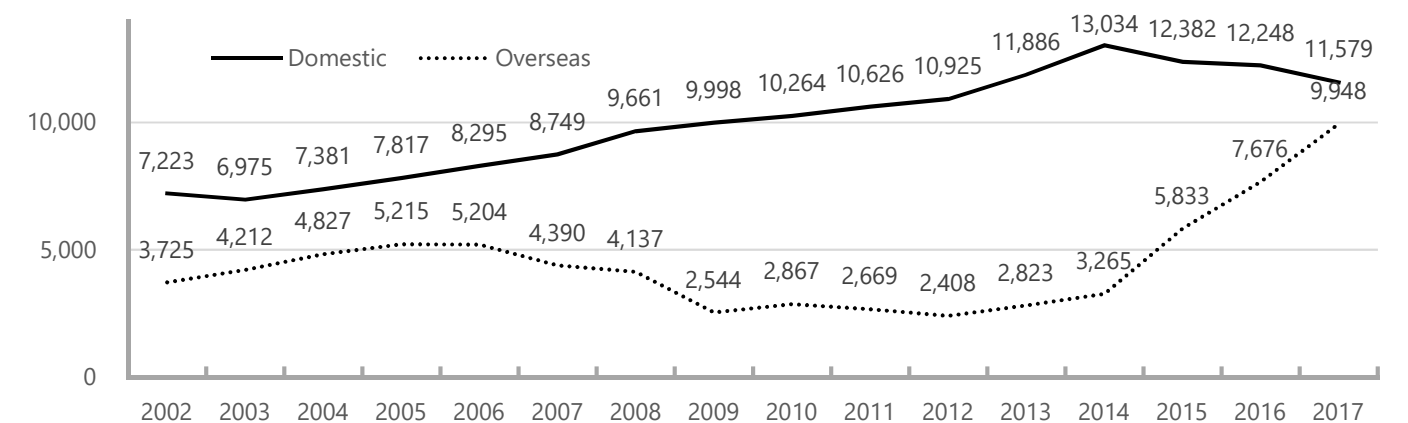
Topics in the Japanese Animation Industry from 2016 to 2017

〈Overseas Market Size Close to Domestic Market Size〉

As seen in the comparison between the domestic market size and overseas market size (Fig.2), the overseas market's

sharp rise since 2015 almost overtook the domestic market, while the domestic market, reaching its peak in 2014, has declined for three consecutive years due to the decline seen in major genres, such as Merchandising and Pachinko. If the sales arising from application games and other digital merchandise not covered in this survey (as mentioned in the former paragraph) were added, the domestic market would likely show an increase. But just with the current figures, it is hard to deny that the Japanese market relies on the sales in the overseas market. Substantial growth in the overseas market which covers the decline in the domestic market is fully welcomed. Yet, it is frightening that Japan greatly relies on the overseas market. There are several risks to be concerned over, such as a sudden change of business environment in China due to politics (such as the so-called "China Risk") or the distribution environment occupied by US major platforms. Actually, the animation industry (i.e. animation studios and other related businesses) gains no upliftment despite the record-breaking sales in the market. This may be because animation studios and the like have few chances to obtain the benefits from sales arising from Internet distribution and application games, which are thought to occupy a large part of overseas sales. It is desirable both for the market and the industry that the domestic market, which is now in transition, stabilizes soon.

[Figure 2] The Domestic and Overseas Revenues of Japanese Animation Industry in a Broad Sense (Yen in billions)



Based on questionnaires conducted by the Association Japanese Animations

〈The Market of Application Games Originating from Animation〉

As mentioned last year, the collaboration and synergy between animation and game industries are big themes for future animation businesses. Aniplex, which made a big breakthrough from 2016 to 2017, predicted the arrival of a new window for the animation industry: a genre of application games originating from animations (or animations originating from application games). It is estimated that the market has already grown to a size that is hard to ignore, yet there is no concrete data at this moment to confirm it. Some say the market size has reached hundreds of billions of yen both in domestic and overseas markets. Actually, it is not difficult for the animation industry to estimate and reflect the sales of application games based on animation works in the market data, but is hard to estimate the sales of animations originated from application games. At this moment it is best to wait for the release of the sales data calculated by the

game industry or the related trade press to count the number of games turned into animation works from the data.

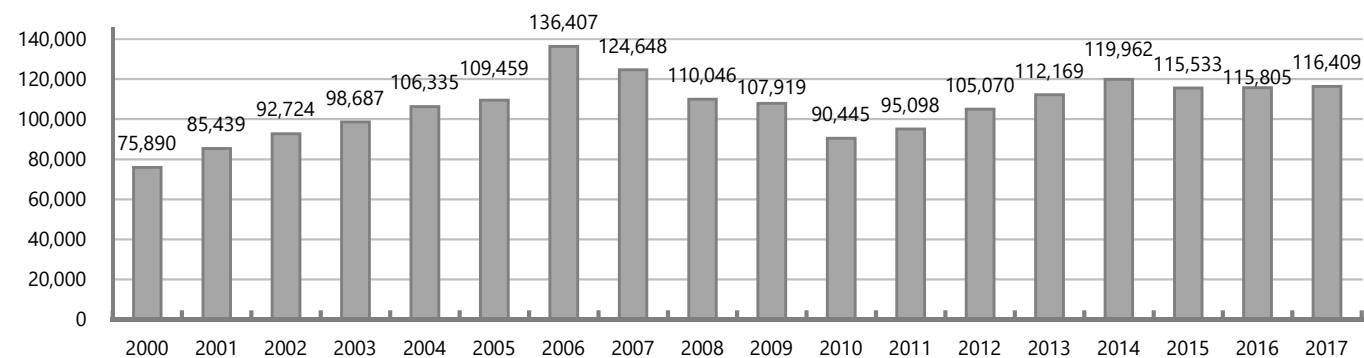
<Change in Theatrical Animation Trends>

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.

<Animation Production Minutes and Reform of Working Practices >

In 2017, the total production minutes of TV animation, the staple of the Japanese animation industry, recorded 116,409 minutes, crossing the 110 thousand min. mark for 5 consecutive years (Fig. 3). The figures, which were almost the same for five years, did not include production minutes of original animations exclusively for Internet platforms, such as Netflix, though there were not that many animations for them. Meanwhile, the production minutes of theatrical animations has remained mostly stable for 3 years in spite of the shift to theatrical animations seen after the changeover to terrestrial digital broadcasting. Accordingly, it seems the total production minutes of Japanese animation centering on TV animation did not grow dramatically (the growth of short animations has seemingly slowed down). Under such circumstances, the animation industry finds itself in a situation where it is forced to improve productivity due to the “Reform of Working Practices” now promoted by the Japanese government at a rapid pace. Respective studios must cut the production time while maintaining the current quality level, and the only way left for them to do so is by means of digitalization in the production methods. “Reform of Working Practices” means digitalization. The Japanese animation industry will be able to move to the next stage only when it achieves digitalization.

[Figure 3] Production Minutes of TV Animations



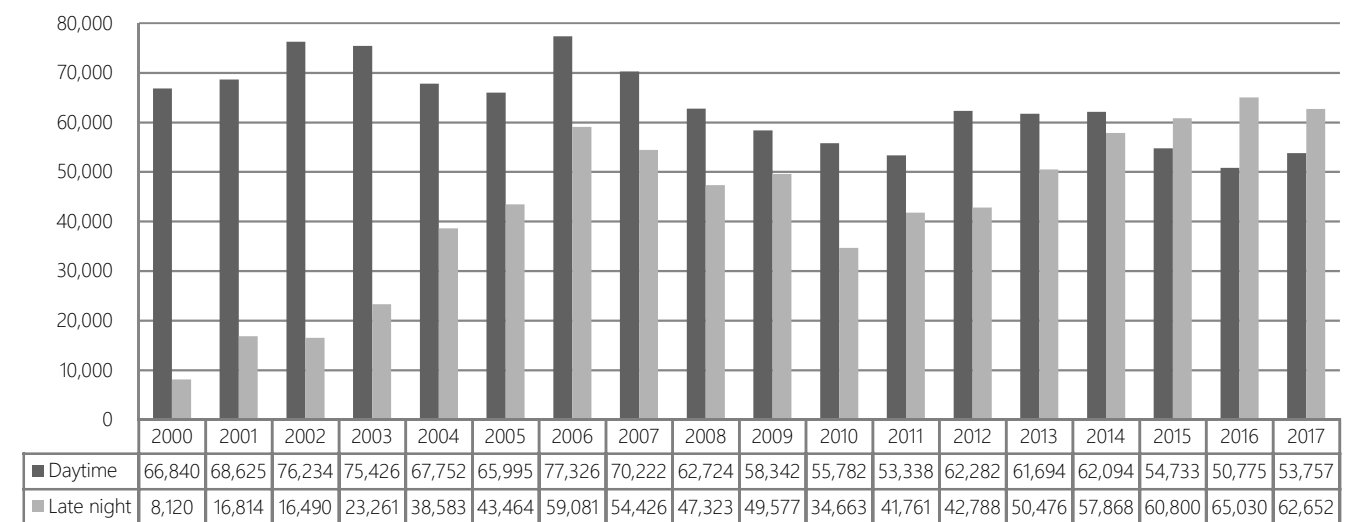
Based on a survey conducted by the Association of Japanese Animations

<Japan, Origin of Animations for Adults>

The share of animations for adults (i.e. late-night anime) took over the share of kids/family animations in 2015, and it seems the trend has almost stabilized(Fig.4). Animations for adults emerged in Japan ahead of any other country and now only Japanese animations can truly fulfill the needs of adult animation fans now gradually increasing worldwide. In that respect, the Japanese animation industry should realize that it has a great advantage. Previously, Japanese

animations for adults were just dominating illegal video hosting sites. There was no TV broadcasting time for those animations, while the videogram market had already collapsed by then. But the situation changed three or four years ago. They have become a source of business being monetized on the Internet. Animations for adults were pushed to the front from the tail end. They have great potential and are the future of Japanese animation. On the other hand, the downward trend of kids/family animations should be concerning. The decline is especially noticeable in newly produced animations. The production minutes of new kids/family animations were 36,337 min. in 2001, 14,388 min. in 2016 and finally 9,790 in 2017, sinking below 10 thousand min. In the genre of kids/family animations, long-lasting works such as Sazae-san and Doraemon are the main productions; therefore, the industry needs to work on many more new kids/family animations since the chances to become a long-running program are very limited. One basic factor of the downward trend is the declining birthrate in Japan. Another is the weakening power of TV as the top media. The time is right for the arrival of a mega-hit kids/family animation from an Internet platform.

[Figure 4] Production Minutes of Kids/Family (daytime) and Adult (late night) (min.)



Calculated by the Association of Japanese Animations based on publicly available statistics (including Perfect Data)
Note 1: Animations broadcast after 21:00 on TOKYO MX, BS 11, etc. are counted as late night anime.

<Increasing Production Costs>

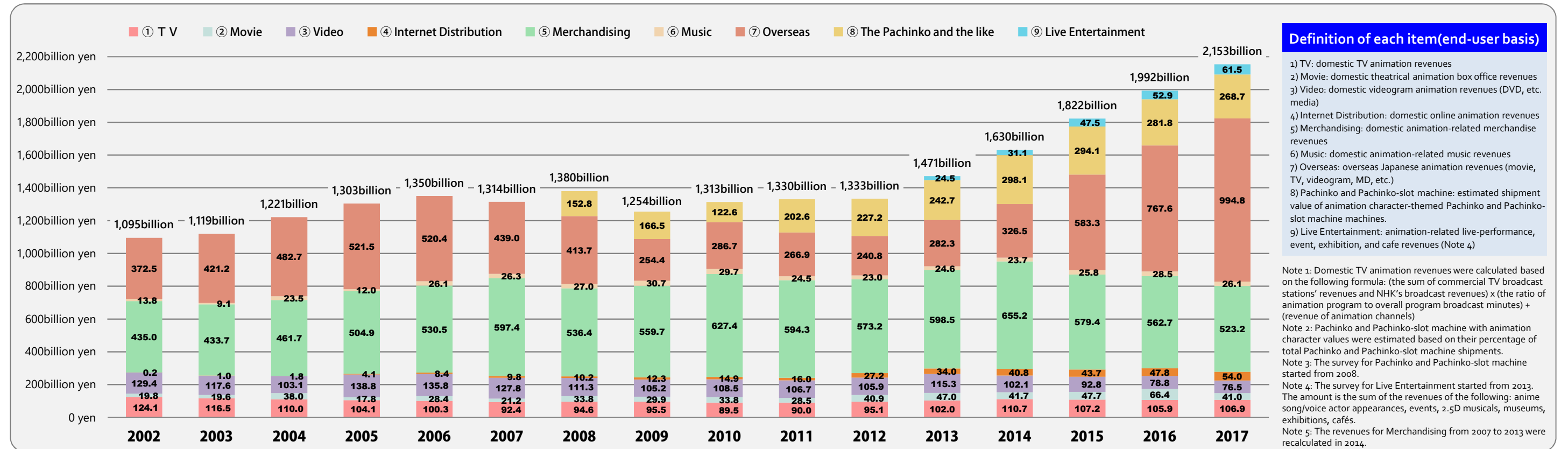
Animation production costs are on a rising trend, which was also confirmed in the responses from animation studios to a questionnaire conducted by the Association of Japanese Animations.

“As the number of programs produced rises, so do production costs and sponsors’ budgets.” “Over the past few years, high quality deserving of the budget has been required in animation production, so the rise in production costs was gradually accepted.” “Unit production costs tend to be raised thanks to newcomers from other industries.” Those were the voices heard from some respondents. One of the main reasons for the increase in production costs is attributed to the fact that it is impossible to match the required quality with recent production costs. In other words, there is a strong demand for higher quality of animations. It is also evidence of growing understanding for the situation. Yet some animation studios which fail to match the required quality may face the risk of failure if they are late to improve productivity under the pressure of the Reform of Working Practices as aforementioned. On the other hand, some say the production costs of certain works are pushed up due to the entry of new players, including domestic game companies, Netflix, Amazon and Chinese businesses. But the production costs for those businesses are presumably on a whole different scale. At any rate, the cheap production costs were one main reason for the strong competence of Japanese animations in the overseas market. It was markedly inexpensive judging from the market level. It is a crucial point for Japanese animations to maintain their competence even in the trend of production cost increases.

Trends in Japanese Animation Market (2018 version)

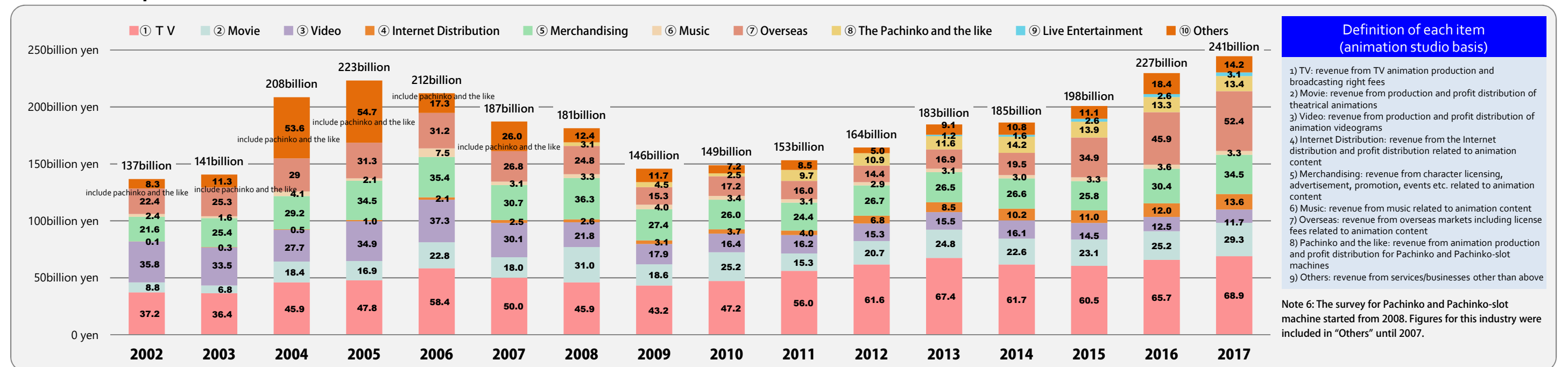
The upper part shows Japanese animation market trends in a broad sense (i.e. market size based on estimated revenues in animation and animation-related product markets). The lower part shows Japanese animation market trends in a more limited sense (i.e. market size based on the estimated revenues of 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 – 2017)



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 – 2017)



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

Trends in Japanese Animation Market (2018 version)

As the overseas market approaches 1 trillion yen, the distribution market exceeds the theatrical market even in Japan.

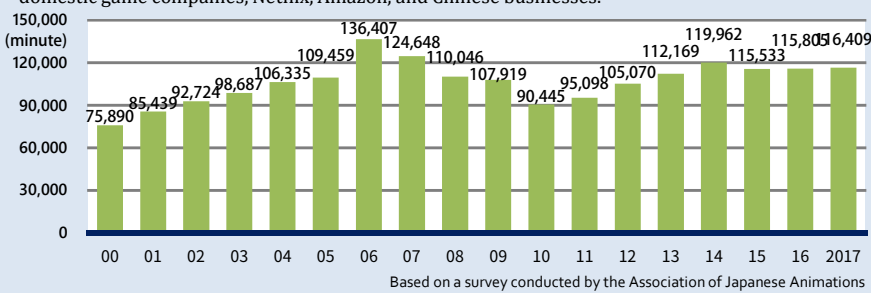
Production Minutes of TV Animations (2000-2017)

■ Production Minutes of TV Animation

*The production minutes of TV animations in 2011 increased as the result of recalculation.

Both production minutes and production costs increased.

The production minutes of TV animations in 2017 were 116,409 minutes, remaining almost the same for 5 consecutive years. The production minutes of original animations exclusively for Internet platforms (Netflix, etc.) are not covered in these statistics. However, those works are not many. The production minutes of theatrical animations have remained almost the same for 3 years. Accordingly, overall production minutes of Japanese animations have stayed almost the same. It is necessary to discuss whether the current production minutes are the limitation of the market demands or the limitation of production capacity. In terms of production costs, they are pushed up significantly due to the demand for higher quality as well as emergence of new players, including domestic game companies, Netflix, Amazon, and Chinese businesses.



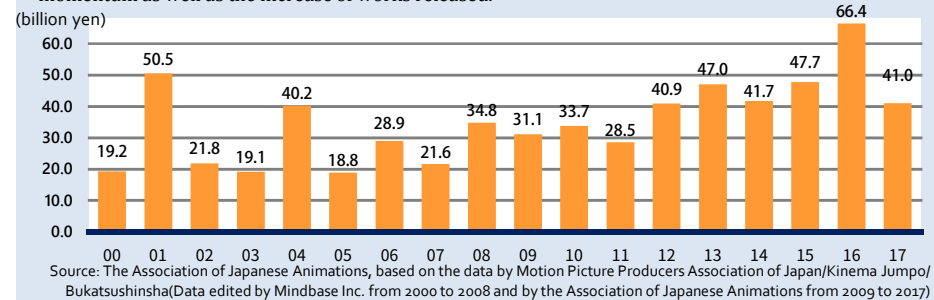
Box Office Revenue of Theatrical Animations (2000-2017)

■ Box Office Revenue

*All theatrical animations released via ordinary and independent distribution routes are included.

Revenue is still solid despite the slump from the loss of Your Name.

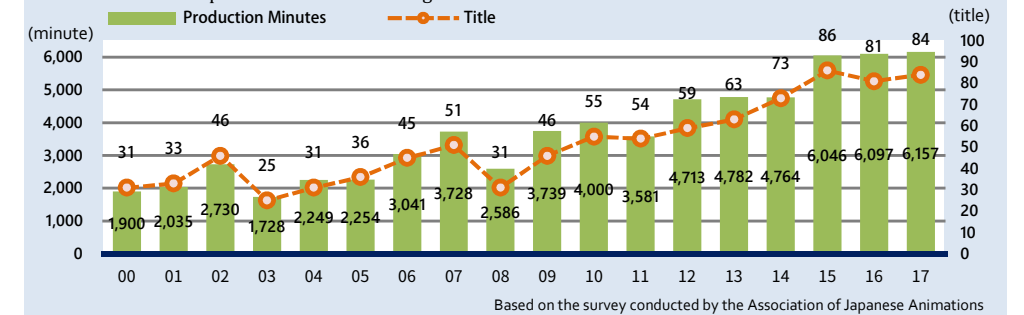
The box office revenue of theatrical animations in 2017 was 41 billion yen, decreasing by 38% over the previous year and the lowest it has been in the last five years. The figure, however, could be interpreted as the genre maintaining recent levels since the box office in 2016 (66.4 billion yen) would be only 41.4 billion yen without Your Name. Among the top 10 Japanese works, 5 theatrical animations were ranked. The two long-running series Detective Conan and Doraemon showed the presence of animation, occupying the 1st and 2nd places in the ranking. Furthermore, theatrical animations based on late night animations performed solidly. Sword Art Online achieved a substantial level of performance not only in Japan but also overseas. The theatrical animation market will continue to stay strong thanks to the momentum as well as the increase of works released.



The Number of Theatrical Animation Works and the Production Minutes (2000-2017)

Both the production minutes and the number of titles have stayed high.

In 2017, 84 theatrical animations were produced, an increase by 3 works over the previous year. The genre has still remained high since the peak at 86 works in 2015. In terms of the production minutes, they grew threefold in the last 15 years. The minutes which were just around 2,000 in early 2000s reached 6,064 in 2015, 6,097 in 2016, and 6,157 in 2017. One reason for the steadiness would be the increasing interest of film distributors who consider theatrical animations profitable even in small-scale businesses. Another would be high expectations that another blockbuster would arrive following the success of Your Name. Plus, there are more animation series which used to be broadcast on TV or were released in the form of OVAs that are now being theatrically released as trilogies or hexalogies. Theatrical animations have the aspect of new revenue sources which complement the loss of videogames.



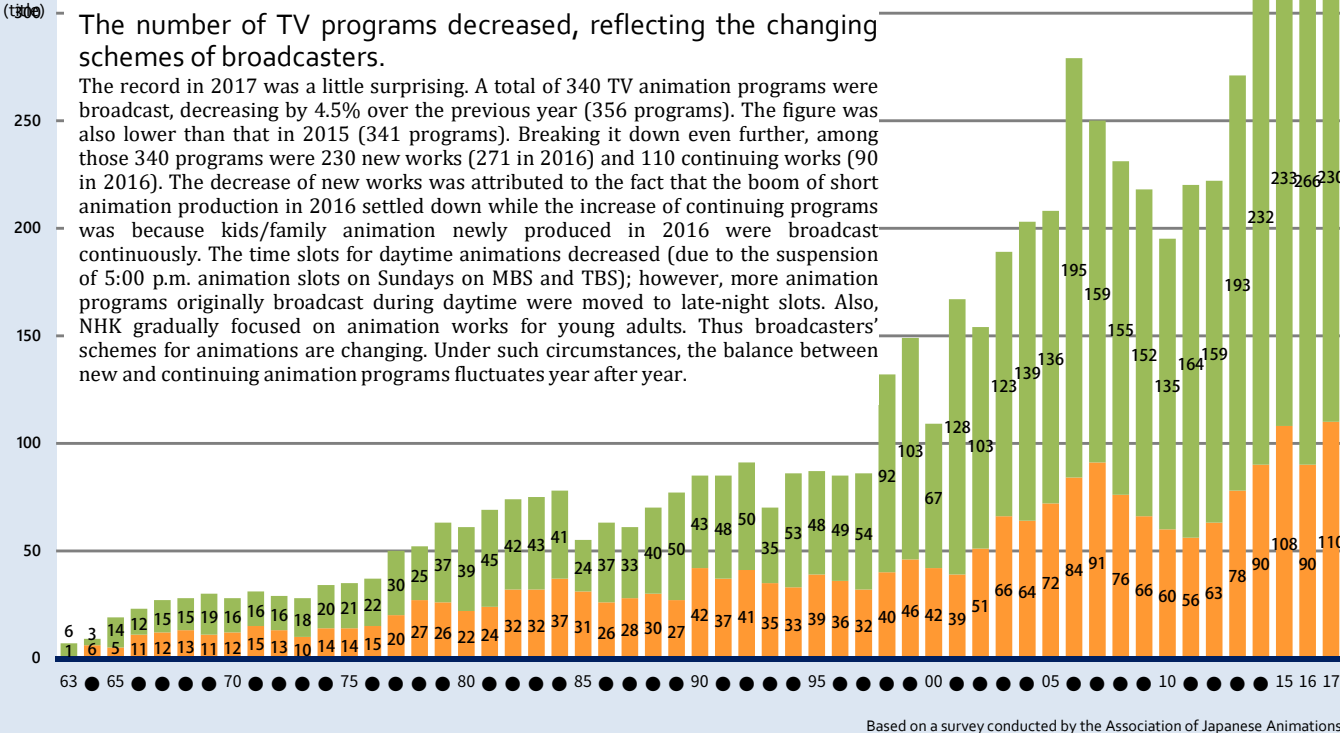
Data & Topics of Japanese Animation Industry 2018

TV Animation programs (1963-2017)

■ 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.

The number of TV programs decreased, reflecting the changing schemes of broadcasters.

The record in 2017 was a little surprising. A total of 340 TV animation programs were broadcast, decreasing by 4.5% over the previous year (356 programs). The figure was also lower than that in 2015 (341 programs). Breaking it down even further, among those 340 programs were 230 new works (271 in 2016) and 110 continuing works (90 in 2016). The decrease of new works was attributed to the fact that the boom of short animation production in 2016 settled down while the increase of continuing programs was because kids/family animation newly produced in 2016 were broadcast continuously. The time slots for daytime animations decreased (due to the suspension of 5:00 p.m. animation slots on Sundays on MBS and TBS); however, more animation programs originally broadcast during daytime were moved to late-night slots. Also, NHK gradually focused on animation works for young adults. Thus broadcasters' schemes for animations are changing. Under such circumstances, the balance between new and continuing animation programs fluctuates year after year.

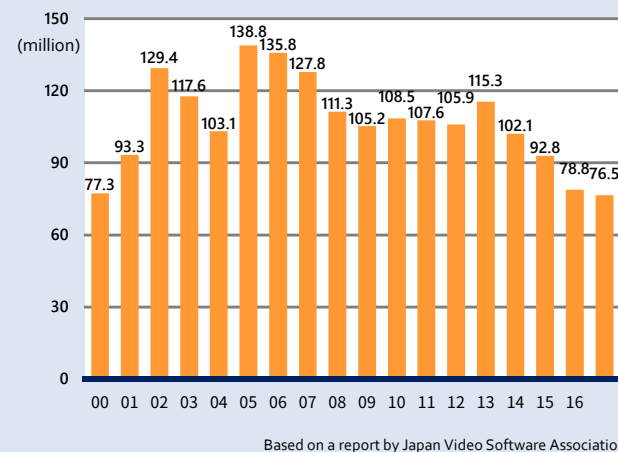


Animation videograms (2000-2017)

■ Revenues of Animation Videograms
 *Revenues of Animation Videograms are calculated based on the total of "Japanese Animation for Adults" and "Japanese Animation for Children" counted in the report for all videograms by the Japan Video Software Association.

The shrinking market awaits new businesses.

The size of Japanese animation videogram market in 2017 was 75.6 billion yen, decreasing for four consecutive years by 2.9% over the previous year. This means the genre lost 40.0 billion in the last five years. What was remarkable was the DVD/Blu-ray release of Your Name, the 2016 blockbuster. Sales reached 5.6 billion yen, leading the market as a huge hit of the year. But if the situation is seen in a different way, it can be said the long-term downward trend of videograms could not be stopped even with Your Name. In this trend, video package makers are hastily trying hard to establish new business models by adding value to existing video packages. It is expected that the videogram market will undergo a huge transformation in the next five years.

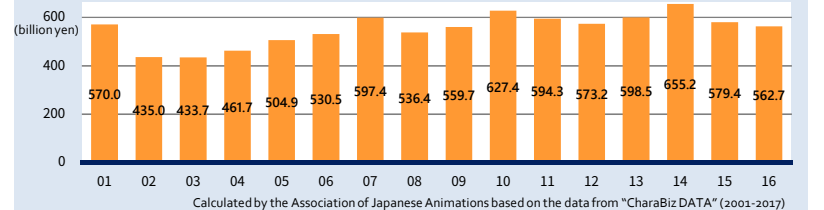


Merchandising Related to Animation (2000-2017)

*Revenues arising only from Japanese animation characters ranked in the top 100 characters selling well in Japan were tallied.
 *Revenues arising from the use of characters in advertisement, promotion, and Pachinko/Pachinko-slot were not included.
 *The data from 2007-2013 was recalculated in 2014.

shrinkage due to the shift from real products to digital products was remarkable.

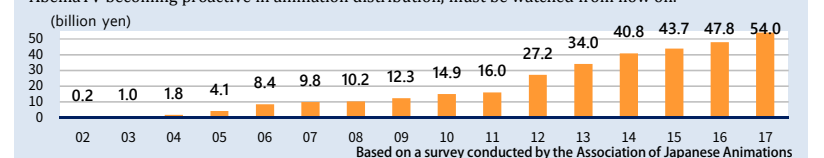
The size of the Japanese merchandising market related to animations shrunk to 523.3 billion yen in 2017, which was 93.0% of its size from the previous year. The shift from real products to digital products becomes more pronounced year after year and the market has been shrinking slowly since 2014 (which is because digital merchandise, especially products related to application games, is not included in the market). In terms of character products targeted toward core fans, the sale of trading products (i.e. products enclosed randomly) decreased while the expansion of fancy merchandise targeted to young women was outstanding. It is necessary to develop merchandise which meets the needs of consumers more than ever.



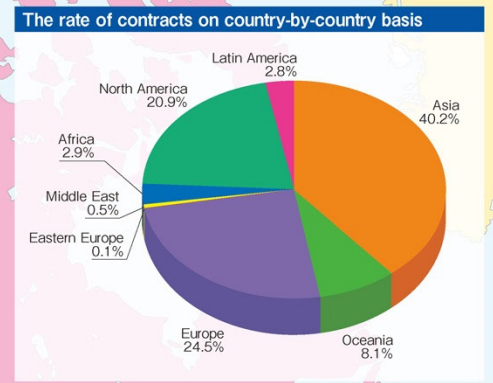
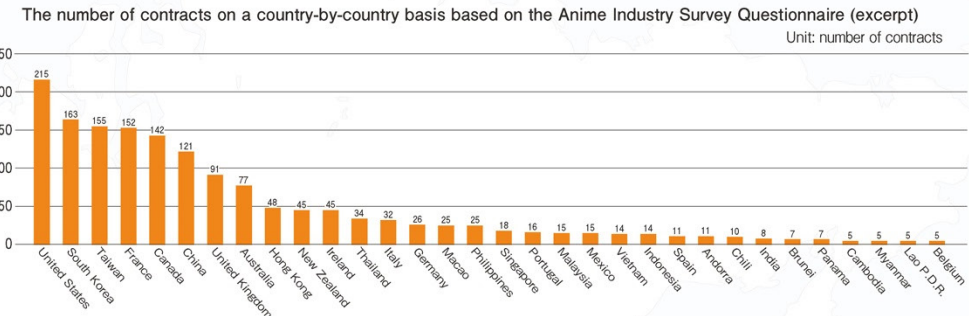
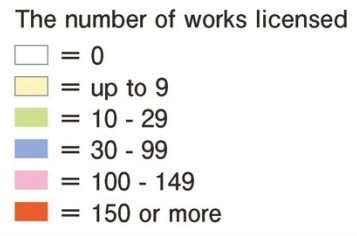
Animation Distribution via the Internet (2002-2017)

The strong market exceeded the size of theatrical animations, reaching almost 70% of the videogram market.

The size of the domestic animation distribution market was 54.0 billion yen, increasing by 13% over the previous year. The distribution market, which was only 0.2 billion yen in 2002, grew rapidly, exceeding the size of the theatrical animation market (46.0 billion yen). It is also almost 70% of the videogram market (76.5 billion yen). The sales revenues of animation studios arising from distribution via the Internet was 13.6 billion yen, increasing by 13% over the previous year. It is obvious that the distribution market developed its presence. In terms of the struggle for supremacy in the market, oligopoly by major platforms progressed while Netflix and Amazon followed domestic major players such as dTV. The movement of major players, including Netflix developing original animations or AbemaTV becoming proactive in animation distribution, must be watched from now on.

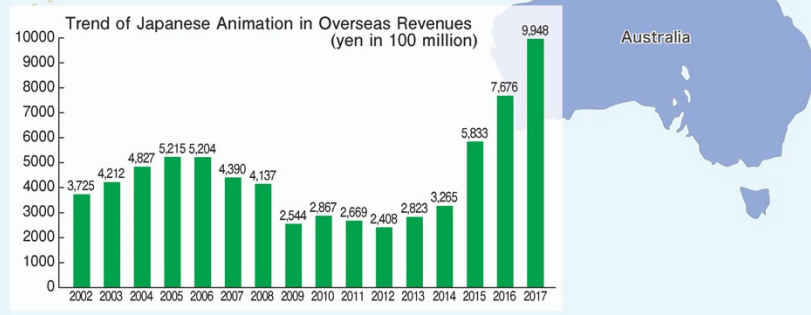


Japanese Animation in Overseas Markets (2018 version)



23% Growth Over the Previous Year, Almost Reaching 1 Trillion Yen

In 2017, Japanese animations earned 994.8 billion yen in the overseas market, exceeding the record established in the previous year. Overseas sales also occupied almost half of the overall animation revenues. The number of the contracts concluded was 2,408 (in accordance with the responses from 24 companies to the questionnaire). Although the responses decreased to one third over the previous year and the number of countries subject to the questionnaire decreased to 96 (221 in the previous year), the number of regional contracts increased to 701 (615 in the previous year). In terms of the contents, deals for or in connection with Internet distribution increased remarkably, which indicates that the presence of Internet distribution grew in overseas markets on the whole. The main factors of its growth include the continuous growth of the Chinese market, the rise of multinational platforms, and the development of high-earning business models. There is no doubt that TV broadcasters as well as net companies will enter a period of tough competition in order to create or obtain powerful contents. The key for further growth of the Japanese animation market depends on whether it can ride the wave or not.



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

Based on the data by JASRAC

| Year | Rank | Work |
|------|------|--|
| 2017 | 1 | DRAGON BALL Z BGM |
| | 2 | Attack on Titan BGM |
| | 3 | POKEMON BGM |
| | 4 | op.1 |
| | 5 | GEKJOUBAN 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 |
| 2016 | 1 | FAIRY TAIL BGM |
| | 2 | DRAGON BALL Z BGM |
| | 3 | POKEMON BGM |
| | 4 | Live On Cardiver 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 |

Number of contracts (by region/language)

| Region | Number of Contracts | Language | Number of Contracts |
|--------------------------------|---------------------|----------------------|---------------------|
| Entire world | 62 | Middle and Near East | 18 |
| Pan-Pacific | 0 | Oceania | 20 |
| British Indian Ocean Territory | 0 | Africa | 7 |
| Europe | 128 | French | 114 |
| Eastern Europe | 2 | German | 20 |
| Northern Europe | 0 | Italian | 14 |
| Asia | 213 | English | 30 |
| Southeast Asia | 3 | Spanish | 1 |
| North Africa | 1 | Portuguese | 1 |
| South America | 6 | Russian | 0 |
| South and Central America | 37 | Others | 5 |
| Middle East | 19 | In-Flight | 5 |
| | | total | 701 |

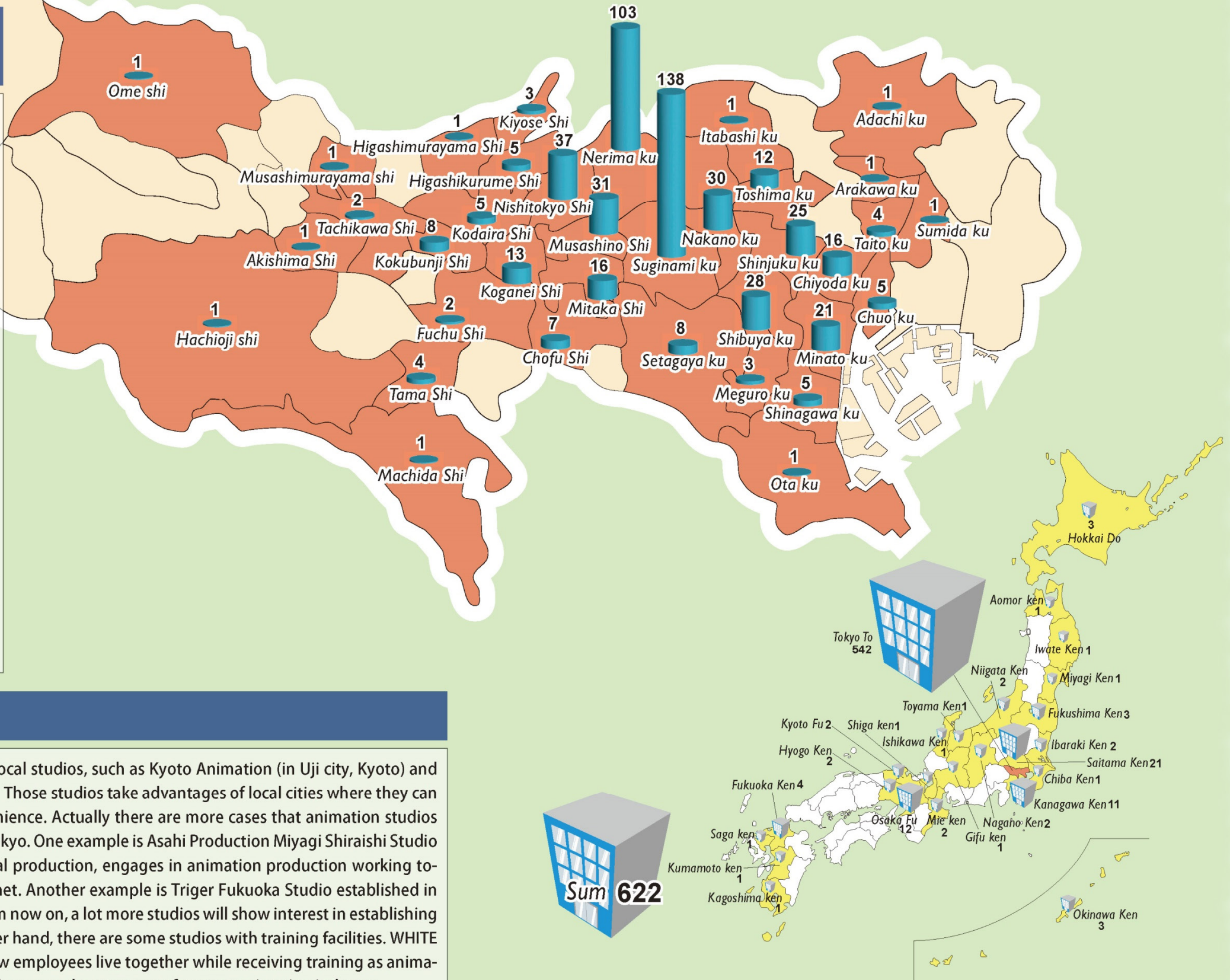
BGM : Background Music

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 Shiraisi 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!

All the necessary information for today's animation market is in this report.

Anime Industry Report 2018

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.

The survey for this report revealed that the market size (in a broad sense) reached 2.1527 trillion yen, increasing by 8.0% over the previous year and recording record-breaking sales for five consecutive years.

Looking at each genre, TV (100.9%), Internet Distribution (113%), Live Entertainment (116%), and Overseas (129.6%) expanded while five genres, i.e. Movie (61.7%), Videogram (97.1%), Merchandising (93.0%), Music (91.6%), and Pachinko (95.8%) decreased. The overseas market showed strong growth which exceeded the decline in the domestic market significantly.

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

■Outline

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| 【Title】 | Anime Industry Report 2018 |
| 【Publisher】 | The Association of Japanese Animations |
| 【Release day】 | December 4, 2018 |
| 【Size/Pages】 | A4 / 83P (Report), 40P (Materials), 72P (All Animation Works Perfect Data) + 4 chart sheets inserted |
| 【Price】 | 10,000 yen (tax excluded) |
| 【Index】 | |

1. Overview of the Japanese animation industry in 2017

*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. Contribution

*"Reform of Working Practice" means "Reform of Production Practice"

Appendix: 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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