

## 1. General Situation

At the end of January 2024, the Motion Picture Producers Association of Japan made an announcement regarding the 2023 Japanese Film Industry Statistics indicating that the domestic distribution business has “almost returned to the level of the pre-COVID-19 (Coronavirus Disease 2019) pandemic period.”

As was described by the above statement, the total nationwide theater attendance in 2023 was 155,535,000, recovering to 92% of that in 2018 before the COVID-19 pandemic. During the COVID-19 pandemic, in 2020, the total theater attendance was 106,137,000, 54.5% of that of the year before in 2019. In 2021, its recovery was not remarkable, remaining 60% of that in 2019. However, in 2022, it recovered to 78% of that in 2019, and in 2023, it reached at 80% of that in 2019.

It is remarkable that Japanese film's 2023 box office income of 148,181,000,000 yen became the second highest since 2000. On the other hand, foreign film's box office income of 73,301,000,000 yen remained 73% of that of 2018 prior to the COVID-19 pandemic. The ratio of Japanese and foreign films box office income was 66.9% vs. 33.1%, showing overwhelming strength of Japanese films.

Animated films, again in 2023, occupied the top part of the box office income list: *THE FIRST SLAM DUNK* (15,870,000,000 yen), *THE SUPER MARIO BROS. MOVIE* (14,020,000,000 yen), *DETECTIVE CONAN: BLACK IRON SUBMARINE* (13,880,000,000 yen), and *THE BOY AND THE HERON* (8,840,000,000 yen). It was the first time that the top three films were all animated films.

Compared with the situation in other countries, Japanese film box office income has recovered fairly well. On the other hand, there are many movie houses that are still struggling. A quite high number of small-scaled movie houses have been continuing their operation while not being fully recovered. We have to carefully observe how the theaters will respond. (Refer to p.71, “Special Topic 1: Community Cinemas after the COVID-19 pandemic.”)

### ■ Number of Theaters and Screens Nationwide

The number of screens in 2023 was 3,682, an increase by 10 from that in 2022. The number of theaters was 592, increased by 2 from that in 2022. During the last 10 years from 2014 to 2023, the number of theaters decreased by 4, while the number of screens increased by 274. Multi-screen theaters (Cinema Complex or “Cine-Com”) increased by 30 and by 327 screens, while other types of theaters decreased by 34 and by 53 screens.

Multi-screen theaters have a total of 3,257 screens, 88.5% of the total number of screens in Japan. Since 2011, the number of multi-screen theaters has been larger than that of other types of theaters. In 2023, there were 360 multi-screen theaters, occupying 60.8% of the total number, and 232 other types of theaters.

There were concerns that the number of closed theaters would

increase because of their temporary closing and the decrease of the audiences due to the COVID-19 pandemic. However, the number of the permanently closed theaters during the period of 3 years between 2020 and 2023 was: 12 multi-screen theaters and 22 other types of theaters, not showing a large influence of the COVID-19 pandemic. During the period of 2020-2023, 16 multi-screen theaters opened, and 14 other types of theaters opened (excluding reopened theaters). So far, no particular influence of the COVID-19 pandemic has been shown on the decreased number of theaters. However, as we will see later, until 2021, the number of newly-opened multi-screen theaters was 5-10 annually, while in 2022-2023, only 2-4 new multi-screen theaters opened. We are concerned that this may be this is the result of the COVID-19 pandemic.

fig.01

[Graphs and Charts: Changes in Number of Screens \(1993-2023\)](#)

#### ■ Attendance

In 2023, the Japanese nationwide theater attendance was 155,535,000, 102.3% of that in 2022. As we saw, the box office income of Japanese film was 148,181,000,000 yen, larger two years in a row than that of the good year of 2019. On the other hand, the box office income of foreign films was 73,3301,000,000 yen, and still on the way to recover.

The average admission price has continued to increase since 2020, and went up to as large as 1,424 yen in 2023 (in 2019, it was 1,340 yen). The number of movie theaters deciding to increase their admission prices has increased due to the rise in general prices and utility costs. It is assumed that due to the COVID-19 pandemic, the share of the senior population in the box office income decreased and the proportion of the regular film-goers with no discount ticket price increased.

fig. 02

[Changes in Number of Attendance \(2013-2022\)](#)

#### ■ Changes in Number of Theaters and Screens according to Theater Type

##### —Multi-screen Theaters (Cinema Complex/Cine-Com)

There are 360 multi-screen theaters with 3,257 screens, occupying 88.5% of the total number of screens (3,682). During the last 10 years, multi-screen theaters increased by 30 and screens by 327. During the period from 2000 to 2008, roughly 20-30 multi-screen theaters were added annually, but since 2009, the pace has slowed down. During the period from 2014 to 2021, 5-10 new theaters were added annually. During the COVID-19 pandemic, in 2020 and 2021, 6 new multi-screen theaters opened each year. In 2022, two new theaters, United Cinemas Chichibu (in Saitama) and TOHO Cinemas Lala Port Fukuoka opened. In 2023, four new theaters opened including 109 Cinemas Premium Shinjuku, TOHO Cinemas Susukino, Aeon Cinema

Tonami (in Tonami City, Toyama Prefecture) and TOHO Cinemas Lala Port Kadoma (in Osaka).

On the other hand, Dinos Cinemas Asahikawa (in Hokkaido), Otsu Alex Cinemas (in Shiga), and Aeon Cinema Nishi-Yamato (in Nara) closed in 2022; and in 2023, Forum Hachinohe and Saku Amu Cinema closed.

#### — Conventional Theaters

During the last 10 years, conventional theaters have decreased by 32 and by 76 screens, falling to 64 theaters and 147 screens in 2023. During the period from 2010 to 2013, digitalization in film exhibition spread, and conventional theaters that could not afford big-scale facility investments to change from film projection to digital cinema projection began to close, and 15-20 theaters have closed every year. Currently, the situation has stabilized.

Among the conventional theaters, more theaters began to present mini-theater-like programs in order to maintain clear differences from multi-screen theater programming. Also, there have been increasing examples of different organizations taking over closed conventional theaters (Cinema Sunrise Hitachi, Okawa Cinema Hall (Fukuoka), etc.). It has been difficult to sort out theaters in the existing categories of “multi-screen theaters,” “conventional theaters,” and “mini-theaters/repertory theaters.”

#### — Mini-Theaters and Repertory Theaters

The total number of mini-theaters and repertory theaters together was 140 theaters with 244 screens; an increase of 21 theaters and 47 screens during the last 10 years. In 2022, two unique mini-theaters opened in Tokyo: Stranger in Sumida City and Shimokita\_Ekimae\_CinemaK2 in Setagaya City. In Masuda City, Shimane Prefecture, Onozawa Cinema started its operation as a reopened venue of a closed theater, and in Kobe, Kino Cinema Kobe Kokusai reopened taking over Kobe Kokusai Shochiku. Tsuruoka Machinaka Kinema and Toyooka Theater, both of which closed in 2020-2021, reopened in March 2023. In 2023, Kino Cinema Shinjuku (taking over EJ Anime Theater), Ogimachi Kinema in Osaka City, and Cinema Post in Shimonoseki City, Yamaguchi Prefecture, opened. In March 2024, Odawara Cinema opened in Odawara City, Kanagawa Prefecture.

Different from usual theaters, Zig Theater opened by renovating a former elementary school building in Yurihama-cho Town in Tottori Prefecture and started screenings in July 2021 (a project every month for about 10 days). Cinema de Aeru in Miyako City, Iwate, (2016~), Out Crop Cinema in Akita City (2021~), and Victory Cinema in Maniwa City, Okauama (2022~) also opened as different venues than usual movie theaters. Movements to create a place for screenings, different from the “conventional business,” should be increasing from now on.

While new screening venues have been created, a number of mini-theaters closed in 2022-2023. In July 2022, Iwanami Hall, a pioneer mini-theater (in Jimbo-cho, Tokyo), closed. Furthermore, Theatre Umeda which had been leading the mini-theater culture in the Kansai area closed in September, followed by the closing of the repertory theater Ginrei Hall in

Tokyo in November, loved by many fans for a long time. In July 2023, the old mini-theater in Nagoya City, Nagoya Cinematheque closed as well as Meien Shogekijo in November, 2023 (Nagoya Kinema-Neu opened in March 2024, on the site of the closed Nagoya Cinematheque). In September 2023, Kyoto Minami Kaikan closed after its renovation and opening four years ago. In Morioka City, mini-theater Art Forum closed in April 2023 due to the building deterioration (and will be rebuilt in a new location). In 2024, Cine La Vita in Sendai City and the old theater in Fukuoka, Nakasu Taiyo Cinema, closed.

Many small-scaled conventional and mini-theaters have not recovered from the damage caused by the COVID-19 pandemic, and changing to digital cinema projecting has been a heavy financial imposition. They also have to respond to the deterioration of their buildings and facilities. Several theaters faced a financial deterioration in 2023, against the conventional belief that they came out of the effects of the COVID-19 pandemic. Many theaters started a crowd funding and fund-raising activities asking for support for the continuation of their theater operation. This situation seems to continue, therefore, some policies to handle this problem are expected. (Please refer to the Special Issue I: Community Cinemas After the COVID-19 Pandemic in p.71.)

During the last 10 years, the number of adult film theaters has decreased, falling to one half their previous number. They decreased to 28 theaters and 34 screens.

fig. 03, 04

[Changes in Number of Theaters \(Sites\) according to Theater Type](#)  
[Changes in Number of Screens according to Theater Type](#)

#### ■ Changes in Number of Theaters and Screens according to Region

In 2023, the total number of movie theaters in Japan was 592, decreasing by 4 during the last 10 years. Meanwhile, the total number of screens in Japan has increased by 274 to 3,682. In each region, the number of screens has increased.

In all the regions except Kanto Region, populations have decreased. Regions with the greatest decrease include Hokkaido/Tohoku (7.6%) and Chugoku/Shikoku (5.9%), larger than others and they have been decreasing more and more each year. Changes in number of theaters and screens could correspond to changes in population. Furthermore, the uneven distribution of screens and regional unbalances have been increasing yearly.

The number of theaters has been increasing in Kanto and Kyushu/Okinawa. In Kyushu/Okinawa, 7 theaters and 74 screens have been added during the last 10 years. When comparing each region's ratio of screens to that of population, the number of screen in the Chubu and Kyushu/Okinawa Regions were more than 1% higher than that in other regions.

Multi-screen theaters have increased in almost all regions in both the number of theaters and the number of screens. In Hokkaido/Tohoku, the

number of theaters decreased by one.

The pace of increase has been slow since 2009, compared with that of the period between 2000 and 2008 when 20-30 new theaters opened annually. Nonetheless, during the last 10 years, both numbers have largely increased in some regions: in Kanto (by 13 theaters and 137 screens); in Kinki (by 4 theaters and 52 screens); and in the Kyushu/Okinawa (by 8 theaters and 71 screens). On the other hand, in Hokkaido/Tohoku, only 4 screens were added, and in Chugoku/Shikoku, 1 theaters and 14 screens.

The numbers of non-multi-screen theaters and screens have decreased in almost all the regions. However, the numbers of mini-theaters and repertory theaters together have increased in almost all regions except in Hokkaido/Tohoku during the last 10 years. During this period, roughly 40 mini-theaters, repertory and conventional theaters together opened. In addition to big cities like Tokyo, Osaka, Nagoya, Kyoto, and Hiroshima, more mini-theaters opened in small- and middle-sized cities, towns, and villages whose populations are less than 200,000. These include Odate City (Onariza), Naka City (Amaya-za), Ome City (Cinema Neko), Joetsu City (Takada Sekaikan), Ueda City (Ueda Eigeki/Traum Raise), Tanba City (Ebisu Cinema), Masuda City (Onozawa Cinema), Shimonoseki City (Cinema Post), Karatsu City (Theater Enya), and Okinawa City (Theater Donuts and Cine Plaza House 1954).

The number of conventional theaters and that of screens have decreased during the last 10 years: in Kanto, by 11 theaters and 26 screens; in Chubu, by 10 theaters and 21 screens; and in Kinki, by 6 theaters and 18 screens. During the last 10 years, in big cities like Tokyo, Nagoya, Shizuoka, Osaka, Hyogo, Hiroshima and so on, conventional theaters have disappeared in the city centers.

The number of adult film theaters has decreased in all regions.

fig. 05

[Chart: Changes in Number of Theaters and Screens according to Theater Type in Each Region](#)