

Otaku Market in Japan: Key Research Findings 2016

◆ Research Outline

Yano Research Institute has conducted a study on the domestic Otaku market with the following conditions:

1. Research period: From August to October, 2016
2. Research targets: Companies and organizations that handle anime or cartoon films (including electronic comics), Manga, light novels, coterie magazines, plastic models, figures, dolls, model railroads, popular idols, professional wrestling, costume-play clothing, services relating to maids and costume plays (including cafés, Japanese pubs, massage parlors, and costume-play diners where the waitresses dress like maids, and other concept cafes), online gaming, adults gaming, AV (Adults video or Pornographic films/DVDs, download contents), dating simulations, boys love, Vocaloid and related products, and toy guns & related products/businesses.
3. Research methodologies: Face-to-face interviews by the specialized researchers, survey via telephone/FAX, online research, and literature search.

What is the Otaku market?

The Otaku market in this research indicates the contents, product sales and services which are regarded to have a certain number of maniac fans. Many of those contents are sold and handled at Akihabara, a town regarded as Otaku's sanctuary. Please refer to Table 4 on the market category definitions and the calculation methods of the market size.

◆ Key Findings

■ Among Entire Otaku Market, Category of Popular Idols Leaped Forward by 30.7% in FY2015 on Y-o-Y Basis

The markets of overall categories within the entire Otaku market for FY2015 by and large showed steady growth. Especially, the market of popular idols, among the various categories, has dramatically leaped forward by 30.7% from the previous fiscal year, achieving double digit growth to attain 155.0 billion yen.

■ 19.1% of Respondents Acknowledged Themselves as “Otaku”

It has become apparent by the question in the questionnaire relating to this research, “Do you recognize yourself as “Otaku” or have you been told by someone that you are “Otaku?” that 19.1% of the respondents have acknowledged as “Otaku” by themselves or by a third party.

■ 14.2% of Those Recognized Themselves as “Otaku” Have Tried VR

To the question, “Have you experienced VR (Virtual Reality)?” 14.2%* of those people who recognized themselves as “Otaku” in the above-mentioned questionnaire have answered YES and 5.0% have answered NO. It showed that with regard to the people who recognize themselves as Otaku, the ratio of those who have already experienced VR exceeded those who have not.

*The total value of the ratios of those who “Experienced VR by buying the device” and who “Experienced VR at the facility for experiencing it.”

■ “Popular Idols” Category Recorded Highest Annual Average Amount of Money Spent Per Person by Those Acknowledged as “Otaku” Among All Otaku Market Categories

When calculated the amount of money spent per person to the 20 Otaku market categories by those people who recognized themselves as “Otaku” in the above-mentioned questionnaire, the highest amount of money they spent annually in average was to the category of “popular idols.”

◆ Report Format

Published report: “Cool Japan Market / Japan’s Otaku market 2016”

Issued on: October 28, 2016

Language: Japanese

Format: 696 pages in A4 format

Price: 120,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

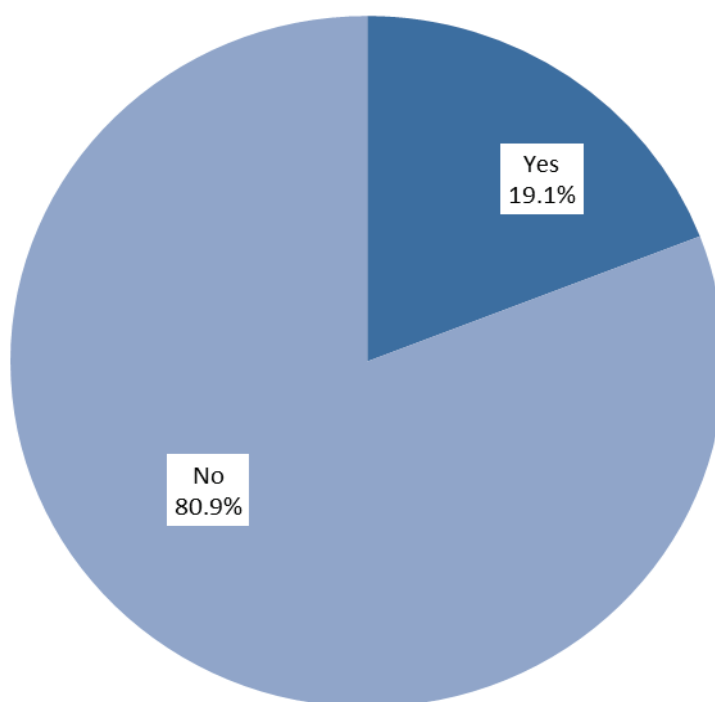
Contacts: Public Relations

Yano Research Institute Ltd. (URL: <http://www.yanoresearch.com>)

Phone: +81-3-5371-6912

E-mail: press@yano.co.jp

■ **Figure 1: Research on Acknowledgment as Otaku**

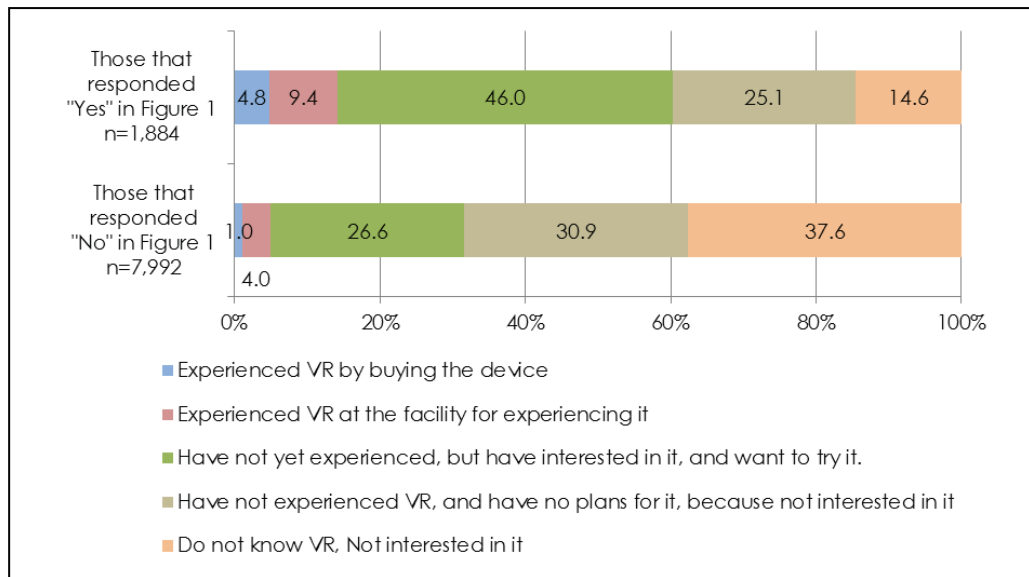


Research by Yano Research Institute

Note:

1. Research period: September, 2016, Research Target: 9,876 men and women, age between 15 and 69 living in Japan, Research method: Online questionnaire Single answer allowed.

■ **Figure 2: Research on Whether or Not Experienced VR (Virtual Reality)**



Research by Yano Research Institute

Note:

- Research period: September, 2016, Research Target: 1,884 people who answered “Yes” and 7,992 people who answered “No” in the above question of “Figure 1”. Research method: Online questionnaire, Single answer allowed.

■ **Table 3: Average Amount of Money Spent Per Otaku Annually**

Target Categories	# of respondents (n)	Average Amount spent annually per person ①
Popular idols	n=255	79,783 Yen
Maid services and costume plays	n=45	37,289 Yen
Anime	n=684	29,843 Yen
Adults gaming	n=87	27,471 Yen
Model railroads	n=77	25,891 Yen
Military (toy guns/survival games)	n=90	24,178 Yen
Professional wrestling	n=63	23,397 Yen
Figures	n=172	21,799 Yen
Plastic models	n=132	19,928 Yen
Costume-play clothing	n=57	18,526 Yen
Coterie magazines	n=162	17,512 Yen
Dolls	n=51	17,373 Yen
Voice actors/actresses	n=142	16,687 Yen
Online gaming	n=280	16,393 Yen
Manga	n=774	16,370 Yen
AV (adults' video/DVDs)	n=87	13,471 Yen
Boys' love	n=85	13,153 Yen
Dating simulations (excluding adults gaming)	n=94	11,681 Yen
Light novels	n=207	11,133 Yen
Vocaloid	n=78	8,950 Yen

Research by Yano Research Institute

Note:

- Research period: September, 2016, Research Target: 1,884 people who answered “Yes” to the question in Figure 1; Research method: Online questionnaire; Multiple answers allowed. The table shows the annual average sum of money spent per person for each of the item, in the descending order.

■ **Table 4: Market Definition by Category**

Category	Definition of Respective Market
Coterie magazines	Magazines and software published by an individual or a group of people with the same interests at their own expense. The survey targets those sold on a commission-base at sales exhibitions or at some stores, or sold by means of downloading it. The market size is calculated based on the retail amount.
Plastic models	Plastic models made of plastic parts of various objects such as robots, cars, airplanes, buildings, and etc. to be assembled. The market size is calculated based on the domestic shipment value.
Figures	Elaborately-made dolls with their body, hair, clothing and everything made from PVC, non-foamed urethane, or soft vinyl. Basically they are for those of age 14 and above. The market size is calculated based on the domestic shipment value.
Dolls	Clothed and hair-implanted dolls, parts and clothing made from cloth that targets mainly adults. The market size is calculated based on the domestic shipment value.
Model railroads	Models of railroads with reduced scale of the real railroads and gauges (the inner width between the two rails). Train cars, diorama, rails, power units are included. The market size is calculated based on the domestic shipment value.
Popular idols	Popular idols' concert tickets, CD/DVDs, photo books, other related goods, membership fees for fan clubs, etc. The market size is calculated based on the amount of money consumed by the users.
Professional wrestling	Tickets for professional wrestling matches, products relating to professional wrestlers (brochures, shirts, towels, etc.), other fees that relate to professional wrestling fans. The market size is calculated based on the amount of money consumed by the users.
Costume-play clothing	The market of clothing that is worn by some of characters in anime, manga, games, movies, TV dramas, and etc. It includes ready-to-wear uniforms of some professions and schools, and masquerade (fancy) dresses for disguising. The market size is calculated based on the domestic shipment value.
Services relating to maids and costume plays	Cafes, restaurants and other services where shop assistants wear costumes of maids/butlers (or some other characters' clothing) to serve customers. Sex-related business is not included. The market size is calculated based on the sales of the businesses.
Online gaming	The games that is available to play when the players are connected to the internet. Gaming applications for mobile phones and social gaming are included. However, network-supporting video game consoles that can be found in amusement centers, or game platforms (PCs, home-use game hardware, mobile phones), provider-connection fees, and telephone fees are not included. The market size is calculated based on the sales of the businesses.
Adults gaming	Computer gaming that do not allow to play or to purchase by those less than 18 year-olds (or 15 year-olds). It mainly aims to satisfy adults' sexual curiosity. The market size is calculated based on the domestic shipment value.
AV (adults' video or pornographic films/DVDs)	Videos and images that do not allow 18-year olds and younger to watch, rent or purchase. Those image media mainly aim to satisfy adults' sexual curiosity. The market size is calculated based on the domestic shipment value.
Dating simulation	Games that enable players to romantically involved with the virtual characters within the game. Games that apply to the above-mentioned "adults gaming" are not included, but online contents, and those contents for home video games, gaming software for PCs, and for mobile terminals are included. The market size is calculated based on the domestic shipment value. Gaming platforms, connection fees, packet fees are not included in the market size.
Boys' love	The contents targeted for women with the subjects of romance of gay, Those contents of just beautiful young men without any romantic involvement, or those contents targeted for men, are not included. The market size is calculated based on the domestic shipment value.
Vocaloid	Vocaloid is the singing voice synthesizing software or desktop music software and its characters. This research includes the sales of the software itself, sales of music tunes made from the software, sales of the products related to the characters, and secondary creations from the characters. The market size is based on the retail price.
Toy guns/Survival Gaming	Externally imitated guns that are for playing. This research targets two types of toy guns: Air soft guns and model guns, and excludes custom parts and bullets. Also excluded are those hunting guns that need license, sports guns (air rifles/guns), those guns used for accessories in the military fashion or goods. The market is calculated based on the domestic shipment value. Survival gaming indicate those games that use toy guns to shoot each other at a specially prepared ground for the game. The survival gaming market size is calculated based on the sales of the businesses.

by Yano Research Institute