

## Otaku Market in Japan: Key Research Findings 2017

### ◆ Research Outline

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

1. Research period: From September to October, 2017
2. Research targets: Companies and organizations that handle anime or cartoon films, Manga (including electronic comics), light novels, coterie magazines, plastic models, figures, dolls, model railroads, popular idols, professional wrestling, cosplay clothing, cosplay cafes where store staff cosplays in a special costumes primarily maids when serving to customers (including cafés, Japanese pubs, massage parlors, cosplay diners, and other concept cafes), online gaming, adults gaming, AV (Adults video or Pornographic films/DVDs, contents to download), dating simulations, boys love, Vocaloid with related products, and toy guns & related products.
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 are sold and handled at Akihabara, a town regarded as Otaku's sanctuary. In this research, 15 categories are covered. Please refer to Table 2 on the definitions of each market categories and the calculation methods of the market size.

### ◆ Key Findings

#### ■ Among Entire Otaku Market, Popular Idol Market in FY2017 Projected to Expand by 12.3% on Y-o-Y Basis to Attain 210.0 Billion Yen

The market of popular idols in FY2016 grew by 20.6% from the previous fiscal year to attain 187.0 billion yen. The market has been supported by the fans of popular boy groups belonging to Johnny's Entertainment, and some girl groups including AKB48. In addition, emergence of some other idol groups has led the market being on the rise. The market of popular idols in FY2017 is projected to rise by 12.3% of the size of the previous fiscal year to reach 210.0 billion yen.

#### ■ FY2017 Vocaloid Market Increases by 4.2% on Y-o-Y Basis to Reach 10.0 Billion Yen, Expected to Keep Rising for Future

The market of vocaloids and its peripheral products in FY2016 grew by 4.3% from the previous fiscal year to attain 9.6 billion yen. Emergence of "Hatsune Miku" has triggered to form the market and has been continue growing by the concerts taken place, related products sold, derivative works created, and many other activities regarding vocaloids. In recent years, some characters of vocaloids have been recognized by general consumers and have begun being used in food, apparel and other products. Because some live events have grown to be large in scale, the vocaloid market in FY2017 is likely to expand by 4.2% to reach 10.0 billion yen.

■ **FY2017 Toy Guns/Survival Gaming Market Expected to Grow Steadily by 3.0% on Y-o-Y Basis to Reach 20.9 Billion Yen**

The toy guns/survival gaming market in FY2016 rose by 3.0% from the preceding fiscal year to 20.3 billion yen. The market of survival gaming has grown steadily because the recent boom has attracted new participants in addition to the existing players. Such a tendency has led the toy gun market to grow as well. With some earnest attempts to attract new users and the market continues being in demand by repeat users, the toy guns/survival gaming market in FY2017 is projected to rise by 3.0% from the preceding fiscal year to achieve 20.9 billion yen.

◆ **Report Format**

Published report: “Market of Cool Japan/Otaku 2017”

Issued on: October 31, 2017

Language: Japanese

Format: 730 pages in A4 format

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

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■ **Table 1: Market Overview and Forecast by Category**

Unit: Hundred Million Yen

Category	FY2016 Market Overview and Forecast	FY2015	FY2016	FY2017 (Forecast)
<b>Coterie Magazines</b>	Sales exhibitions have been on the decrease by the sales on consignment and those through downloads have been strong. The market is forecasted to expand for the future.	775	795	817
<b>Plastic Models</b>	The market of those character models originated from "anime" has been favorable, especially those anime series, "Mobile Suit Gundam," because of the release of new products for younger generation. The market of scale models have been stagnant, but it has maintained stableness due to support by enthusiastic fans.	266	275	277
<b>Figures</b>	While the market is on the rise because of expansion of light users and continuous inbound tourism demand, there are negative factors such as reduced prices of products. Nevertheless, the market is expected to grow due to new contents possessed by each makers.	320	320	325
<b>Dolls</b>	In spite of some well-sold products contributed to market expansion in FY2015, the market in FY2016 is projected to be on the decline from downturn from the favorable results in the year before. Nevertheless, the market is likely to be stable due to support by the fans.	135	130	125
<b>Model Railroads (Diorama and Other Peripheral Products Included)</b>	The sales of standard products and those packaged products for beginners have been stable in FY2016. However, there was no newsworthy products when compared to last year, which failed to expand the market. With the new products to be released, the market is expected to expand in FY2017.	105	105	108
<b>Popular Idols</b>	The market has been supported by the fans of popular boy groups belonging to Johnny's Entertainment, and some girl groups including AKB48. In addition, emergence of some other idol groups has led the market being on the rise.	1,550	1,870	2,100
<b>Professional Wrestling</b>	Multiple organizations of professional wrestling have respectively taken measures to increase new fans. The attempts successfully increased those fans who are young or women. The market therefore is on the rise.	124	126	132
<b>Cosplay Clothing</b>	Triggered by Halloween and some other party events, cosplays have been established as general hobby. With costumes having been available with less prices through online, the market is on the decline.	435	390	350
<b>Services relating to Maids and Cosplays</b>	Large companies that are successfully expanded their customer types have shown stable growth. On the other hand, those companies that operate conventional business are facing predicament, being required to change their forms of business. Large companies are expected to continue being stable.	115	111	111
<b>Adults Gaming</b>	Sales through download have been on the rise but not enough to cover the loss of package of gaming softwear. This tendency is likely to continue.	176	168	160
<b>AV (Adults' Video, DVDs, Contents to Download)</b>	The market as a whole has been on the decrease, but some enthusiastic fans have been supporting the market and preventing from decreasing further.	504	492	495
<b>Dating Simulation</b>	By acquiring more users of general women, the contents for women have driven the entire market. However, the competition among similar contents and lack of driving forces to gain additional new users have made the market as a whole to be somewhat stagnant.	163	150	155
<b>Boys' Love</b>	Though the market has been supported by fans, the sales of books and drama CDs have been stagnant. The market environment has become difficult from increasing number of low-price electronic books.	220	219	219
<b>Vocaloid (Related Products Included)</b>	Emergence of "Hatsune Miku" has triggered to form the market and has been continue growing by the concerts taken place, related products sold, derivative works created, and many other activities regarding vocaloids. In recent years, some characters of vocaloids have been recognized by general consumers and have begun being used in food, apparel and other products. Because some live events have grown to be large in scale, the vocaloid market is likely to expand furthermore for the future.	92	96	100
<b>Toy Guns /Survival Gaming (Military)</b>	The market of survival gaming has grown steadily because the recent boom has attracted new participants in addition to the existing players. Such a tendency has led the toy gun market to grow as well. With some earnest attempts to attract new users and the market continues being in demand by repeat users, the market is likely to grow steadily.	197	203	209

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Note:

1. Some contents in "Boys' Love" category may sometimes be included in the categories of Coterie magazines, Adults gaming, or AV markets.
2. Some contents in "Vocaloid" category may sometimes be included in the category of Coterie magazines, Figures, Dolls, and Cosplay clothing.
3. Some market sizes are recalculated retroactively.

■ **Table 2: Market Definition by Category**

<b>Category</b>	<b>Market Definition</b>
Coterie magazines	Magazines and software published by an individual or a group of people with the same interests at their own expense. The market size is calculated based on the retail amount of the products sold at coterie magazines sales exhibitions, those sold on commission-base at stores, and those sold by means of downloading.
Plastic models	Plastic models made of plastic parts of various objects to be assembled. Character models indicate those fictitious objects such as robots and some characters in some works such as anime and manga. Scale models include cars, airplanes, ships, buildings, and some others that actually exist or used to exist. The market size is calculated based on the domestic shipment value.
Figures	Elaborately-made representation of a form of a person or a character with body, hair, clothing and everything made from PVC, non-foamed urethane, or soft vinyl. Basically figures are for people in age 14 and above. The market size is calculated based on the domestic shipment value.
Dolls	Hair-implanted representation of a girl, its parts, and its cloth-made clothing. Dolls are mainly for 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	The market of popular idols belonging to entertainment offices. The market size is calculated based on the amount of money consumed by the users on such things as concert tickets, CD/DVDs, photo books, other related goods, membership fees for fan clubs, etc.
Professional wrestling	Tickets for professional wrestling matches, products relating to professional wrestlers (brochures, T shirts, towels, etc.), other fees that relate to activities as fans of professional wrestling. The market size is calculated based on the amount of money consumed by the users.
Cosplay clothing	The market of clothing 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 cosplays	Cafes/restaurants and other services where staff of such restaurants and shops 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.
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. Those contents for download are included. The market size is calculated based on the domestic shipment value.
Dating simulation	Games that enable the 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 mobile terminals, and online contents 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 a gay couple. Those contents of just beautiful young men without any romantic involved, 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 (Military)	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.

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