

Licensed Character Market: Key Research Findings 2011

◆ Research Outline

Yano Research Institute has conducted a study on licensed character market with the following conditions:

1. Research period: From June to August, 2011
2. Research targets: Companies doing business using characters (e.g. manufacturers, licensors, licensees, and related companies of retailing and distributing industries)
3. Research methodologies: Face-to-face interviews, survey via telephone and literature research including statistics data published by the government and industrial organizations.

What are characters?

Characters in this research indicate those in anime (cartoons), Manga, games, and illustrated pictures, and not live actors.

What is character business?

It is a license business about characters for using them in a business. For example, characters can be featured in some kinds of products to be sold, or used as a means of promoting some products, or used to develop them into other media such as movies, TV programs, Manga, and etc. Therefore, character business in this research indicates market of merchandising rights and copyrights of characters.

◆ Key Findings

- **Character business market in FY 2010 ended up as 2,389.5 billion yen, 98.3 % of the previous year.**

Size of character business market (merchandising rights and copyrights) shrank to 2,389.5 billion yen in FY 2010, 98.3 % of the previous year. The market is always fiercely competitive due to difficulty in winning diverse preference of consumers and due to emergence of many characters every year. The market has been on the decline since it peaked in 2005, but the predicament was in the latter half of 2008, when grim environment bitterly influenced every part of economy including manufacturers, distributors and consumers. The market as a whole became steady undertone by FY 2009 and FY 2010 with smaller reduction range.

- **Advanced marketing approaches seen in character business market**

Character business market shows new attempts and advanced approaches year by year, including collaboration among popular characters, designers, and artists. Such attempts

add novel charms into existing characters, capturing new customers as a result. The market is lively with various characters used in expressing various products and services infused with the atmosphere and the world that characters possess. The market is also shoring up live entertainment sectors by releasing movies and musicals featuring licensed characters.

◆ **Report format:**

Published report: “Licensed Character Business 2011”

Issued on: August 31, 2011

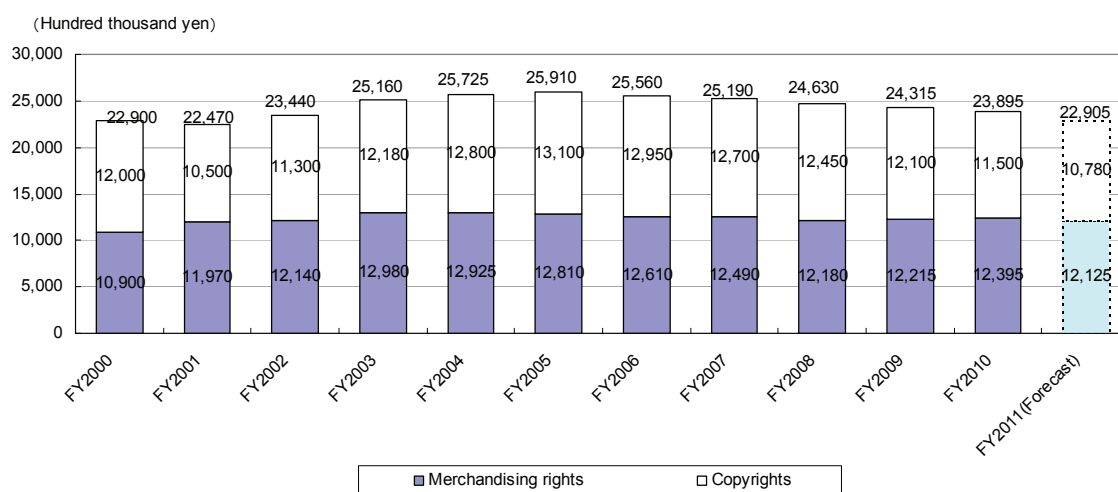
Language: Japanese

Format: 493 pages in A4 format

Price: 126,000 yen (6,000 yen of consumption tax shall be charged for the sales in Japan.)

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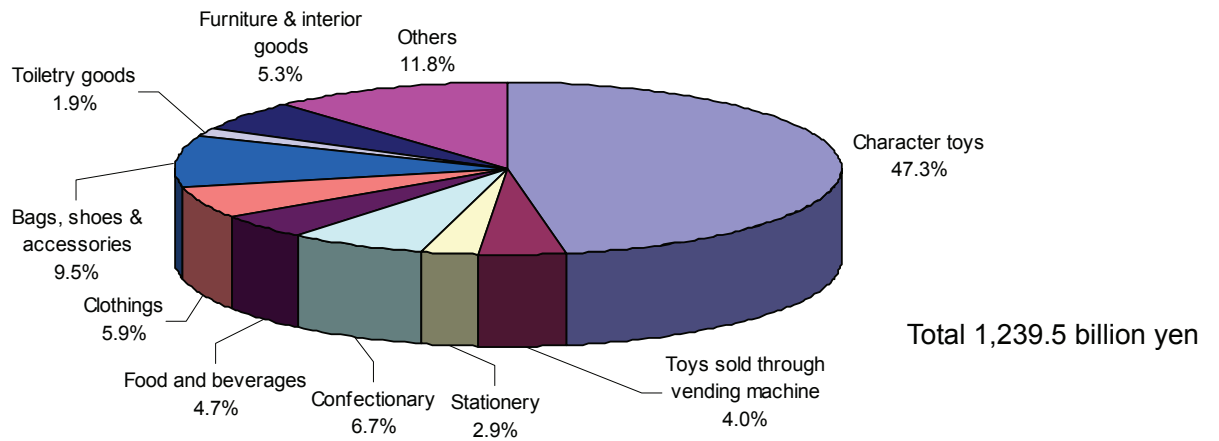
Figure 1. Transition of size of licensed character business market



Notes:

1. Merchandising rights is the rights to use the character incidental to products. It is calculated based on retail value in the figure.
2. Copyrights include publishing rights and the rights to use the character as “an image character,” or use it as a means of advertising a product. It is calculated based on contract sum.

Figure 2. Market of merchandizing rights of licensed character business by category in 2010



Note: Estimate calculation by YRI, based on retail value.