

Toy Market in Japan: Key Research Findings 2011

◆ Research Outline

Yano Research Institute has conducted a study on domestic market for toys and game contents with the following conditions:

1. Research period: From October to December, 2011
2. Research targets: Manufacturers, wholesalers, and retailers related with toys and game contents
3. Research methodologies: face-to-face interviews by the specialized researchers, survey via telephone, and mail-in research

<What is the toy market?>

The toy market in this research indicates the following nine categories:
Electronic toys, scale model toys, boy characters & toys, girl characters & toys, games, soft toys or stuffed toys, basic toys (education, blocks, etc.), seasonal & miscellaneous toys, and video games.

◆ Key Findings

■ Toy market including TV games shrank after it peaked in FY 2007, but recovered slightly in FY2010 on Y-on-Y basis except for TV games

The size of domestic toy market in FY 2010 ended up as 759.7 billion yen based on shipment volume, which is a decline by 1.7% from the previous year. It stems from saturation of demand in the market of TV games which lost users to social games (games provided in SNS). Although the entire market of toys recoded three consecutive years of decline, the market confined to the eight items, excluding TV games, showed steady growth, attaining 331.2 billion yen, up by 2.3% year-on-year, because character toys for boys are in good demand.

■ Toy market for 9 items including TV games is estimated to scale down in FY2011 Y-on-Y, while hardly any change or a slight decline is anticipated for 8 items excluding TV games

Although sound growth can be expected for boy toys, the toy market for eight items excluding TV games is estimated to change little or to decline slightly by 0.5 % at 329.6 billion yen due to rebound from well-sold boy-character toys in FY2010 and flood disasters that struck in Thai where factories of major toy manufacturers concentrate. As TV games are continuously losing ground to social games, the size of toy market for nine items including TV games is estimated to be 705.4 billion yen, down by 7.1% from the previous year.

◆ Report format

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Price: 115,500 yen (5,500 yen of consumption tax shall be charged for the sales in Japan.)

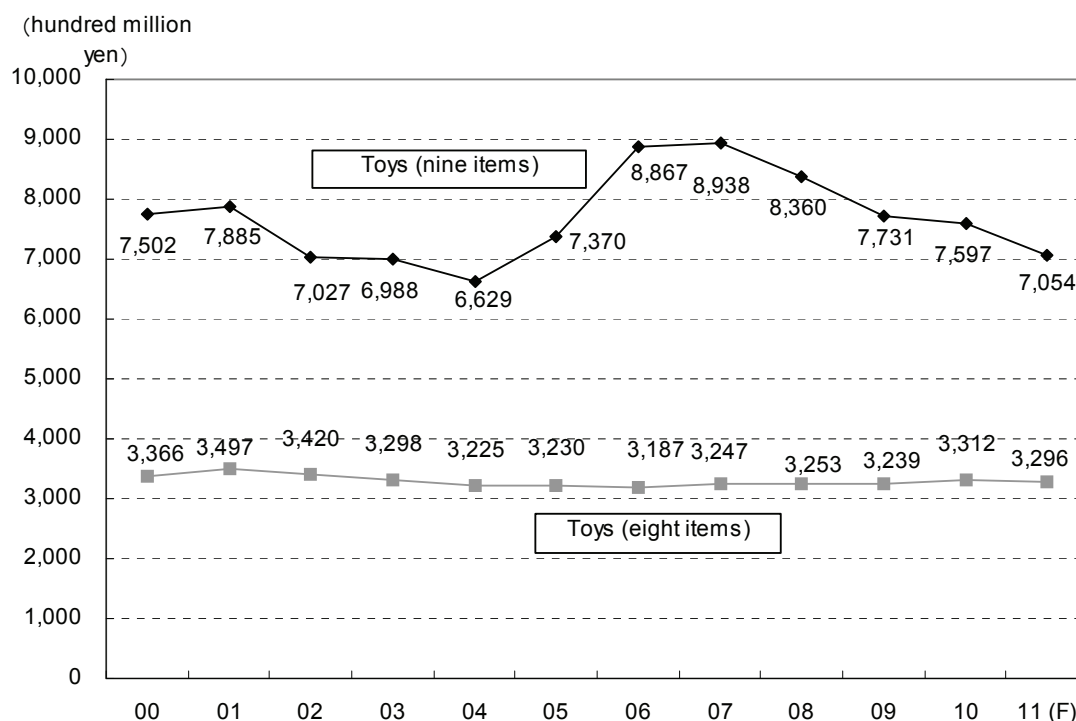
Contacts: Public Relations

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

Phone: +81-3-5371-6912

E-mail: press@yano.co.jp

■ **Figure 1: Transition of Size of Domestic Toy Market**



Notes:

1. The figures are based on shipment values of manufacturers
2. “Eight items” of toys indicates “electronic toys”, “scale model toys”, “boy characters & toys”, “girl characters & toys”, “games”, “soft toys or stuffed toys”, “basic toys (education, blocks, etc.)”, “seasonal & miscellaneous toys”. Nine items indicates the above eight items plus “video games”.
3. 11 (F) indicates “FY2011 (Forecast)”.

■ Table 1: Transition of Size of Toy Market for Nine Items

	FY2009		FY2010		FY2011 (Forecast)	
	hundred million yen	% (Y-on-Y)	hundred million yen	% (Y-on-Y)	hundred million yen	% (Y-on-Y)
Electronic toys	450	91.6 5.8	438	97.3 5.8	420	95.9 6.0
Toys for building scale models	457	97.2 5.9	450	98.5 5.9	451	100.2 6.4
Toys for boys	1,030	104.8 13.3	1,060	102.9 14.0	1,042	98.3 14.8
Toys for girls	241	97.2 3.1	250	103.7 3.3	253	101.2 3.6
Games (analog games)	127	97.7 1.6	122	96.1 1.6	132	108.2 1.9
Seasonal & miscellaneous toys	295	95.2 3.8	308	104.4 4.1	296	96.1 4.2
Basic toys	483	103.2 6.2	523	108.3 6.9	544	104.0 7.7
Educational toys and toys for infants	408	102.0 4.9	440	107.8 5.8	455	103.4 6.5
Jigsaw puzzles	75	109.6 0.9	83	110.7 1.1	89	107.2 1.3
Soft toys or stuffed toys	156	102.0 2.0	161	103.2 2.1	158	98.1 2.2
TV games	4,492	88.0 58.1	4,285	95.4 56.4	3,758	87.7 53.3
Total	7,731	92.5 100.0	7,597	98.3 100.0	7,054	92.9 100.0

[estimated by Yano Research Institute]

Note:

4. The figures are based on shipment values of manufacturers

Table 2: Transition of Size of Toy Market by Attention-getting Item

	FY2009		FY2010		FY2011 (Forecast)	
	hundred million yen	% (Y-on-Y)	hundred million yen	% (Y-on-Y)	hundred million yen	% (Y-on-Y)
High targeted toys	867	99.7	856	98.731	867	101.285
Trading card games	397	101	412	103.78	452	109.709
Toys packaged with confectioneries	454	96	463	101.98	454	98.0562
Toys in capsules	182	90.7	190	104.4	199	104.737
Figure toys	283	102.9	293	103.53	306	104.437
Online games	800	100.9	753	94.125	725	96.2815
Games available in mobile/smart phones	1331	100.9	2241	168.37	3000	133.869
Social games	371.4	655.8	1400.76	377.16	2570.32	183.495

[estimated by Yano Research Institute]

Notes:

5. The figures are based on shipment values of manufacturers
6. Please see Reference in the next page on details of each item. Note that “Toys packaged with confectioneries”, “toys in capsules”, “figure toys”, “online games”, “games available in mobile/smart phones” are not included in this toy market research, but they are estimated by YRI as they are drawing attentions.
7. Since the calculation methods for “toys in capsules” has been changed, the figures in the past do not match with the current ones.
8. “High targeted toys” indicate overall toys that target adults. They are included in each eight items respectively, except for TV games.
9. “Trading card games” are included in “toys for boys” or “games (analog games)”.
10. “Online games” indicate games that can be played on the displays of PCs through internet.
11. Figures of “figure toys” are extracted from “Otaku Market in Japan: Key Research Findings 2011” issued by YRI on October 26, 2011.

Reference:

Category	Products included in each category
1. Electronic toys	Electronic games, electronic soft toys, PC for kids, Handy Karaoke (high-targeted toys included)
2. Toys for building scale models	Plastic models, radio control models, model guns, other toys for hobby (high-targeted toys included)
3. Toys for boys, boy-character toys	Boy-character toys, toy radio controls, other toys for boys (most of trading card games and high-targeted toys included)
4. Toys for girls, girl-character toys	Girl-character toys, dress-up dolls, other toys for girls (high-targeted toys included)
5. Games	Board games, analog games, general games (some trading card games and high-targeted toys included)
6. Soft toys	Soft toys or stuffed toys, dolls and others (high-targeted toys included)
7. Basic toys	Educational toys, toys for babies and infants, blocks, toy vehicles, jigsaw puzzles etc (high-targeted toys included)
8. Seasonal & miscellaneous toys	Dolls and toys for seasonal or traditional festivals, fireworks, and other toys
9. TV games	TV game hardware, mobile game devices, TV game software (some online games included)