

Otaku Market in Japan: Key Research Findings 2012

Increase of users from non-Otaku has led to sound market expansion

◆ Research Outline

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

1. Research period: From July to September, 2012
2. Research targets: Companies and organizations that handle anime or cartoon films (including electronic comics), light novels, coterie magazines, plastic models, figures, dolls, model railroads, popular idols, professional wrestling, costume-play clothing, services relating to maids and costume plays, online gaming, dating simulations, erotic gaming or adults gaming, AV (Adults video or Pornographic films/DVDs), boys love, Vocaloid and related products, and voice acting products.
3. Research methodologies: Face-to-face interviews by the specialized researchers, survey via telephone/FAX

What is Otaku market?

Otaku market in this research indicates the contents, product sales and services which have a certain number of maniac fans. Many of those contents are sold and handled at Akihabara, a town regarded as Otaku's sanctuary.

◆ Key Findings

■ Otaku Market for FY2011 Remained Strong, Supported Not Only by Core Fans but Also by General People

Strength of Otaku market in FY2011 continued from the previous fiscal year, because reasonable products and services gained acceptance not only from robust core fans but also from entry users, "light" users and even general people who are non-Otaku.

■ Dating Simulations and Online Gaming Rose by 30% on Y-o-Y Basis in FY2011

Dating simulations market has increased by 30.4% year-on-year to mark 14.6 billion yen, and online games market also increased by 29.2% year-on-year to reach 386.8 billion yen. Markets of Vocaloid, popular idols, and services relating to maids and costume plays attained 10% growth from the previous fiscal year, and markets of voice acting, figures, light novels, electronic comics, costume-play clothing, dolls, model railroads and plastic models remained sound.

■ Business Develops as Companies Deliver Information and Collects User Reaction Simultaneously

Notable point is that the distance between the businesses or providers of products, services and contents, and the users has become closer and closer due to the use of SNS and video hosting services. There are increasing numbers of businesses that issue information and collect reactions from the users at the same time.

◆ Report format

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■ Table 1: Estimated Market Size of Otaku Market and FY2011 Market Overview

Category	FY2011 Market Overview	FY2010	FY2011	FY2012 Estimated
Electronic comics	FY2011 ended up attaining only a slight increase due to delayed support for smart phones/tablets/PCs. Mid-term view, however, is promising for growth.	540	545	600
Coterie magazines	FY2011 became a slight decrease due to influence from the great earthquake especially from March to April. FY2012 can expect a small rise due to increase of users and diversified channels.	700	690	716
Light Novels	The market rose slightly, because some light novels are published as manga, created as anime/games. Media mix strategy to make stories out of popular manga has also turned into good results.	316	322	327
Plastic models	FY2011 showed sound growth due to popularity of characterized plastic models among young people. FY2012 can expect some sales of the “Sky-Tree”-related scale models.	262	263	268
Figures	Low-priced deformed figures, dress-up figures, movable figures have become popular from wide range of people. The market is likely to continue growing.	293	307	312
Dolls	The market has been supported by solid-base audience, but it is estimated to stay the same level or to increase only slightly at best, with no large expansion of users can be expected.	137	138	136
Model railroads (including Diorama and peripheral Goods)	Sales of large companies are steady, but most of the businesses are suffering from reduced profits. The market is estimated to stay the same level or to increase only slightly.	160	161	160
Popular idols	The market is supported by increase of fans of “AKB48” and its family groups. The market continues to be on the rise.	557	630	720
Professional wrestling	Although market has been shrinking due to less TV broadcasting, the reduction rate is only slightly, partly due to popularity of New-Japan Pro-Wrestling.	125	122	121
Costume-play clothing	The market is on the rise because of increased awareness of “costume-playing” and rising participants.	412	415	419
Services relating to maids and costume plays	Although boom of “Maid café” has faded, those cafes that provide similar services to non-Otaku customers are driving the market to keep the increasing tendency since FY2010.	93	103	107
Online gaming	High-spec contents for heavy users have peaked, but the market succeeds to keep the increasing tendency because of rapid growth of social gaming.	2,994	3,868	4,290
Adults’ gaming	Despite increase of users, increase of abuse, decrease of market players/contents have contracted the market.	261	243	220
AV (adults video or pornographic films & DVDs)	The market is shrinking due to free-of-charge images and videos available through the internet, price collapse of contents, and increase of abuse.	554	539	528
Dating simulation	The market continues to rise due to increase of users of dating simulation available from smart phones and other mobile phones, targeted for women.	112	146	156
Boys’ love	Although certain levels of demands exist and solid growth can be expected from electronic comics and coterie magazines, the market is likely to level out or shrink from the weak note of other publications.	220	216	215
Vocaloid (including related goods)	The market was created in 2007, when “Hatsune Miku” was released. Ever since, it is on the rise due to the sales of the related goods and the activities on secondary characters.	55	63	73
Voice acting	Increased awareness of voice actors and popularity of voice-acting artists have raised the market. However, the market itself grew only a little, because the entire music software market has been shrinking.	140	149	154

Notes:

1. Market size of “Services relating to maids and costume plays” and Vocaloid” are based on the domestic sales, “Popular idols”, “Professional wrestling”, and “Voice acting” are based on users’ consumed amount of money, and other items are based on the domestic shipment value.
2. “Dating simulations” have contents that are also included in the category of “online gaming.”
3. “Boys’ love” has contents that are also included in the categories of “manga”, “anime”, “electronic comics”, “light novels”, “coterie magazines”, “adults gaming,” and “AV.”
4. “Vocaloid” has contents that are also included in the categories of “manga”, “coterie magazines”, “Figures”, “Dolls”, “costume-play clothing”, “online gaming”.
5. “Voice acting” has contents that are also included in the categories of “Popular idols”.

■ **Table 2: Definition of Categories within Otaku Market**

Category	Definition of Respective Market
Electronic comics	Comics read through PCs, mobile phones and other mobile devices.
Light Novels	Entertainment novels with anime-style artworks illustrated on covers and inside. Targets are mainly young adults.
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.
Plastic models	Plastic models made of plastic parts of various objects such as robots, cars, airplanes, buildings, and etc. to be assembled.
Figures	Elaborately-made dolls with body, hair, clothing and everything of which are made from PVC, urethane, or soft vinyl. Basically they are for those of age 14 and above.
Dolls	Clothed and hair-implanted dolls, parts and clothing made from cloth that targets mainly adults.
Model railroads	Models of railroads with reduced scale of the real railroads and gauges. Train cars, diorama, rails, power units are included.
Popular idols	Popular idols' 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, shirts, towels, etc.), other fees that relate to professional wrestling fans.
Costume-play clothing	The market of clothing worn by characters from anime, manga, games, movies and etc. It includes shop-bought uniforms of some professions and schools.
Services relating to maids and costume plays	Restaurants or services that shop assistants wear costumes of maids/butlers (or some other characters' clothing) to serve customers. Sex-related business is not included.
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, telephone fees are not included.
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.
AV (adults' video or pornographic films/DVDs)	Videos and images that do not allow 18-year olds and younger to watch, rent or purchase. It mainly aims to satisfy adults' sexual curiosity.
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 included. Gaming platforms, connection fees, packet fees are not included
Boys' love	The contents with the subjects of which are romance of gay, targeted for women. Those contents of just beautiful young men without any romantic expressions, or those contents targeted for men, are not included.
Vocaloid	The market consists of the sales of voice synthesis 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 related products and secondary creations from the characters.
Voice Acting	Voice actors' CD/DVDs, live event tickets, other related goods, membership fees for fan clubs, and etc. However, those CD/DVDs and other related goods not sold as "voice actors" are not included.