

Otaku Market in Japan: Key Research Findings 2014

◆ Research Outline

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

1. Research period: From August to October, 2014
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, online gaming, adults gaming, AV (Adults video or Pornographic films/DVDs), dating simulations, boys love, Vocaloid and 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?

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

■ **Categories of Idols, Vocaloid and Toy Guns in FY2013 Increased by 20% on Y-o-Y Basis**

Among various categories in the Otaku market, the following three categories rose by around 20%: Size of popular idol market rose by 19.9% to attain 86.3 billion yen, the vocaloid market up by 19.2% to reach 8.7 billion yen, and the toy gun market (including air-guns and model guns) rose by 23.1% to attain 8 billion yen.

■ **23% of Respondents Acknowledged Themselves as "Otaku"**

It has become apparent by the questions 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 23% of the respondents have acknowledged as "Otaku" by themselves or by a third party.

■ **67% of "Otaku" are Unmarried**

Among those people who recognized themselves as "Otaku" in the above-mentioned questionnaire, 33% were married (or had been married) and 67% were unmarried (regardless of whether they have someone special currently or had in the past.)

■ **Highest Annual Average Amount of Money Spent to Among All Categories by Otaku" is "Popular Idols"**

Among 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" where they spent average 94,738 yen. Therefore, growth of the popular idol market has partly been contributed by large amount of money spent by each of those people.

◆ Report format

Published report: "Cool Japan Market / Japan's Otaku market 2014"

Issued on: October 31, 2014

Language: Japanese

Format: 671 pages in A4 format

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

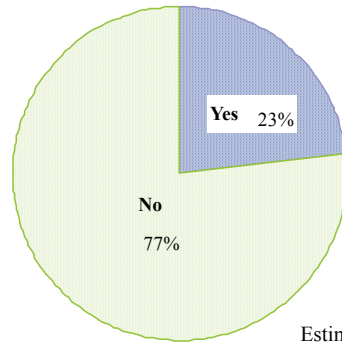
Contacts: Public Relations

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

Phone: +81-3-5371-6912

E-mail: press@yano.co.jp

■ **Figure 1: Research on Recognition as Otaku (response for the Question “Do you recognize yourself as Otaku?”)**

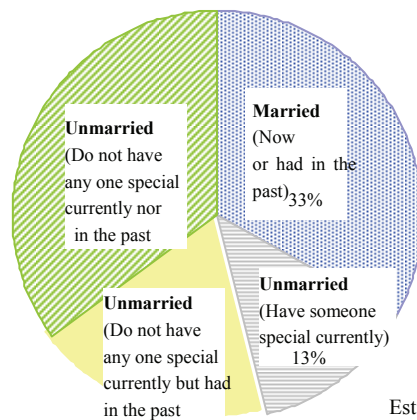


Note:

1. Research period: September, 2014, Research Target: 10,080 people (men and women), age 15 to 69 living in Japan, Research method: Online questionnaire Single answer allowed.

Estimated by Yano Research Institute

■ **Figure 2: Research on Marriage of Otaku**



Note:

2. Research period: September, 2014, Research Target: 2,299 people who answered “Yes” in the above question of “Figure 1”. Research method: Online questionnaire Single answer allowed.

Estimated by Yano Research Institute

■ **Table 1: Average Amount of Money Spent Per Otaku Annually**

Categories	# of respondents (n)	Amount spent annually in Average per person
Popular idols	n=247	¥94,738
Model railroads	n=77	¥47,330
Adults gaming	n=103	¥41,877
Dolls	n=50	¥38,780
Figures	n=214	¥31,548
Toy guns	n=75	¥31,024
Professional wrestling	n=59	¥29,876
Coterie magazines	n=206	¥27,473
Online gaming	n=250	¥25,286
Anime	n=800	¥25,096
Costume-play clothing	n=72	¥24,345
Plastic models	n=138	¥19,833
Manga	n=855	¥15,694
AV (adults' video/DVDs)	n=95	¥13,216
Dating simulation (Excl adults gaming)	n=120	¥13,198
Boys' love	n=120	¥9,367
Light novels	n=283	¥7,657
Maid services and costume plays	n=40	¥6,200
Vocaloid	n=93	¥5,339

Note:

3. Research period: September, 2014, Research Target: 2,299 people who are regarded as Otaku from the above questions in Figure 1 and 2. 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.

Estimated by Yano Research Institute

■ **Table 2: 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.
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 that is worn by some of characters in 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.
Toy guns	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, those guns for sports, military fashion or goods. The market is calculated based on the domestic shipment value.

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