

Otaku Market in Japan: Key Research Findings 2011

Increase of "light" Otaku population has led to market expansion

◆ **Research Outline**

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

1. Research period: From July to September, 2011
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
3. Research methodologies: Face-to-face interviews by the specialized researchers, survey via telephone/FAX and literature research

What is Otaku market?

Cool Japan/Otaku market in this research indicates the contents which have a given number of maniac fans. Many of those contents are sold and handled at Akihabara, a town regarded as Otaku's sanctuary. Note that the targets of this research slightly differ from those in 2010 and the market figures in the past have been reviewed. Therefore, some figures cannot be compared to those in the past.

◆ **Key Findings**

- **2,581 (25.5%) out of 10,102 of valid responses said "Yes" to the questionnaire asking, "Do you consider yourself as 'Otaku'? Or have you ever experienced someone calling you as 'Otaku?'"**

- **Markets that especially expanded in FY2010:**

Online games market: Increased by 40.5% year-on-year to reach 299.4 billion yen, due to rapid growth in number of users/contents of the social games, and smart-phones.

Dating simulations market: Increased by 30.2% year-on-year to mark 11.2 billion yen, due to increase of game contents aiming for young girls using mobile phones, which gained women users who are not necessarily Otaku.

Electronic comics market: Increased by 28.0 % from the previous year to reach 54.0 billion yen, due to increase of the contents, diffusion of tablet PCs/smart phones, and lower price than paper comics.

Services relating to maids and costume plays: Increased by 10.7 % year-on-year to record 9.3 billion yen, due to aiming for wider target to gain general consumers rather than just

Otaku. Also the popularity of long-established shops have expanded the market.

◆ Report format

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Market size of Otaku market by category in FY 2010 to FY2011

Category	Market Overview	FY 2010 market size	From FY2009 to FY2010	FY2011 market size forecast
Electronic comics	Diffusion of broadband, advanced functions in cell phone terminals, diffusion of smart phones/tablet PCs are expected to continue driving the market even more.	54.0 billion yen	↗	70.0 billion yen
Coterie magazines	With increase of “light” users, download sales and more shops handling coterie magazines, the market is expected to continue scaling up.	70.0 billion yen	↗	68.2 billion yen
Light novels	The market continues to grow due to success of mixed-media strategies: the novels have been developed into anime, movies and games and etc.	31.6 billion yen	↗	33.2 billion yen
Plastic models	With character plastic models became popular; the market successfully gained younger fans. As new TV series of “Gandum” starts broadcasting, the market is likely to continue growing in FY 2011.	26.2 billion yen	↗	26.5 billion yen
Figures	With their reasonable prices, deformed figures and figures with gimmicks are expected to continue driving the market.	29.3 billion yen	↗	30.6 billion yen
Dolls	Though the market declined due to the economic recession in FY2009, the support from solid fans and increase of younger fans turns the market to a slight increase.	13.7 billion yen	↗	13.8 billion yen
Model railroads	The economic recession and failure to gain new fans have turned the market into scale-down in FY2009. The market is predicted to continue declining although very slightly in FY2010	16.0 billion yen	↘	16.0 billion yen
Popular idols	Although popularity of AKB48 has become nationwide, the market seems to be supported only by a few of zealous fans.	55.7 billion yen	↗	56.8 billion yen
Professional wrestling	Once a very popular market with wider range of fans, the market has been shrinking since the latter half of 1990s with less TV broadcasting.	12.5 billion yen	↘	12.2 billion yen
Costume-play clothing	Due to wider recognition of “costume-plays” and increase in number of devotees and related events, the market is predicted to continue growing.	41.2 billion yen	↗	41.7 billion yen
Services relating to maids and costume plays	The market is expected to turn to increase due to targeting of general customers rather than just Otaku and steady growth of long-established shops.	9.3 billion yen	↗	9.6 billion yen
Online gaming	Rapid increase of light users along with diffusion of social games is boosting the market.	299.4 billion yen	↗	316.1 billion yen
Adults gaming	Despite increase of users, gaming abuses and decrease in number of contents are shrinking the market after it peaked in 2002.	26.1 billion yen	↘	25.2 billion yen

AV (adults video or pornographic films/DVDs)	The market has been scaling down due to increase of contents abuse and availability of free erotic pictures/moving images through internet, which led to price collapse.	55.4 billion yen		53.8 billion yen
Dating simulations,	Increase of users in mobile phone games targeting women users and release of popular game contents have been raising the market.	11.2 billion yen		13.7 billion yen
Boys' love	Good performance in electric comics and coterie magazines, a hard battle in publications and drama CDs are estimated to make a slight increase in the market.	22.0 billion yen		21.9 billion yen

Notes:

- 1: "Model railroads" have been reviewed to revise the market size of FY2009 from 16.0 billion yen to 16.5 billion yen. Therefore the growth "From FY2009 to FY2010" has turned to decrease.
- 2: The figures for "Light novels" and "coterie magazines" are based on sales amount, the figures for "idols" and "professional wrestling" are based on consumed amount, and the figures for other categories are based on turnover of businesses.
- 3: "Dating simulations" have contents that are also included in the category of "online gaming."
- 4: "Boys' love" have contents that are also included in the categories of "electronic comics," "coterie magazines," "adults gaming," and "AV."