



Insights into the Japanese Gaming Market in 2025

Free report



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Introduction

We're excited to share this special edition of our Japan market report, which was developed and presented live for UKIE's Virtual Trade Mission: Japan.

This report is designed to help game businesses of all sizes better understand, and strategically navigate, one of the most unique, competitive, and opportunity-rich markets in the world.

Japan holds an unparalleled place in global gaming. From pioneering studios to deeply rooted gaming culture, it offers unmatched potential, but also requires local nuance, cultural understanding, and clever positioning.

In this report, we explore Japan's current games market landscape, highlighting key data on market size, player demographics and motivations, and the standout trends shaping behavior today.

All data and insights come from the **Newzoo Platform**, our flagship tool for understanding the games markets and players around the globe. Whether you're planning to enter Japan or scale your presence, this report gives you a practical edge.

I hope you enjoy the read.



Emmanuel Rosier
Director of Market Intelligence

Key takeaways

1 Market

- ✓ Japanese players are highly valuable, generating 9.1% of global games revenue despite making up just 2.2% of the global player base.
- ✓ Recent revenue growth has been strong, but the weakening JPY against the USD is a headwind for international publishers.
- ✓ PC revenue in Japan has grown rapidly over the past 7 years, but the pace is expected to slow down.
- ✓ Nintendo dominates the domestic console market, accounting for 70% of hardware sales.
- ✓ Excluding mobile and Nintendo platforms, Japan's PC and console market still represents a solid \$2.5–3.0 billion opportunity.

2 Players

- ✓ Japan's PC/console player base is older than in the West, though gender distribution is similar. PC/console penetration is slightly higher in the US and Europe.
- ✓ Storytelling matters globally, but preferences differ: Japanese players value narrative depth and design, while Western players favor open worlds and high-quality graphics.
- ✓ Japanese players are likelier to play solo, while UK & US players enjoy playing with or against other players.

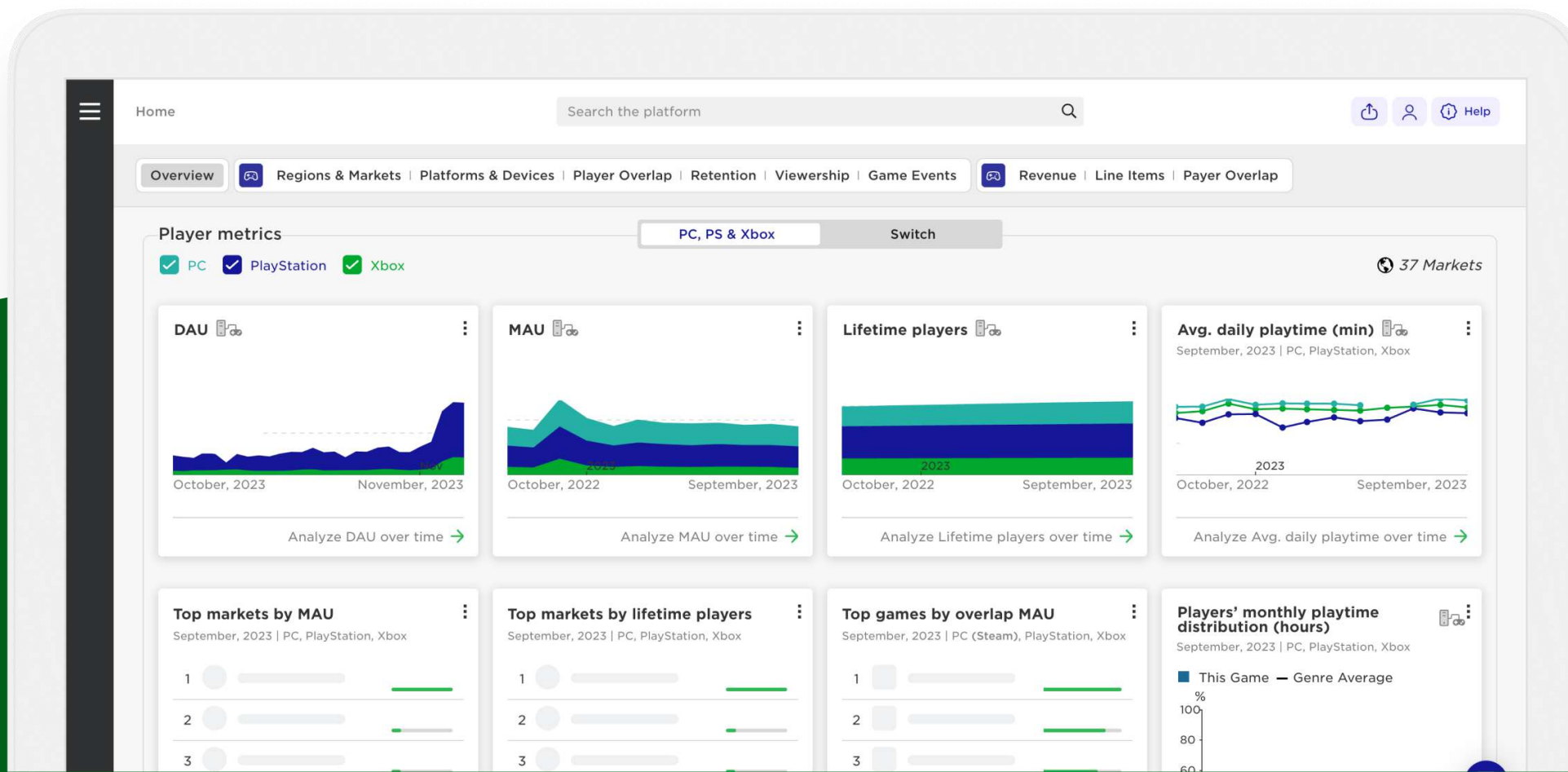
3 Games

- ✓ Japanese players prefer (single-player) RPGs on console and shooters on PC, while the UK prefers shooters across both platforms.
- ✓ Sports is not a significant genre in Japan.
- ✓ Japan much prefers fantasy and science fiction themes.
- ✓ Japanese players gravitate toward domestic franchises, especially Nintendo ones.
- ✓ Japanese publishers dominate the console premium games market while Japanese players choose lower-priced, trendy PC co-op experiences.
- ✓ Apex Legends and Genshin Impact remain massive F2P successes.

Written by Newzoo's market analysts

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Game concept testing



Genre deep dives and game teardowns



Target audience sizing & analysis



Live service game strategy



Concept TAM and sales forecasting



Campaign analysis



Game Health Tracker

Title-level consumer insights, awareness and purchase funnel

Global Gamer Study

Yearly in-depth survey profiling 73.000 gamers worldwide

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SONY



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ERC
ELL



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KONAMI



Market 01

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Genre deep dives and game teardowns

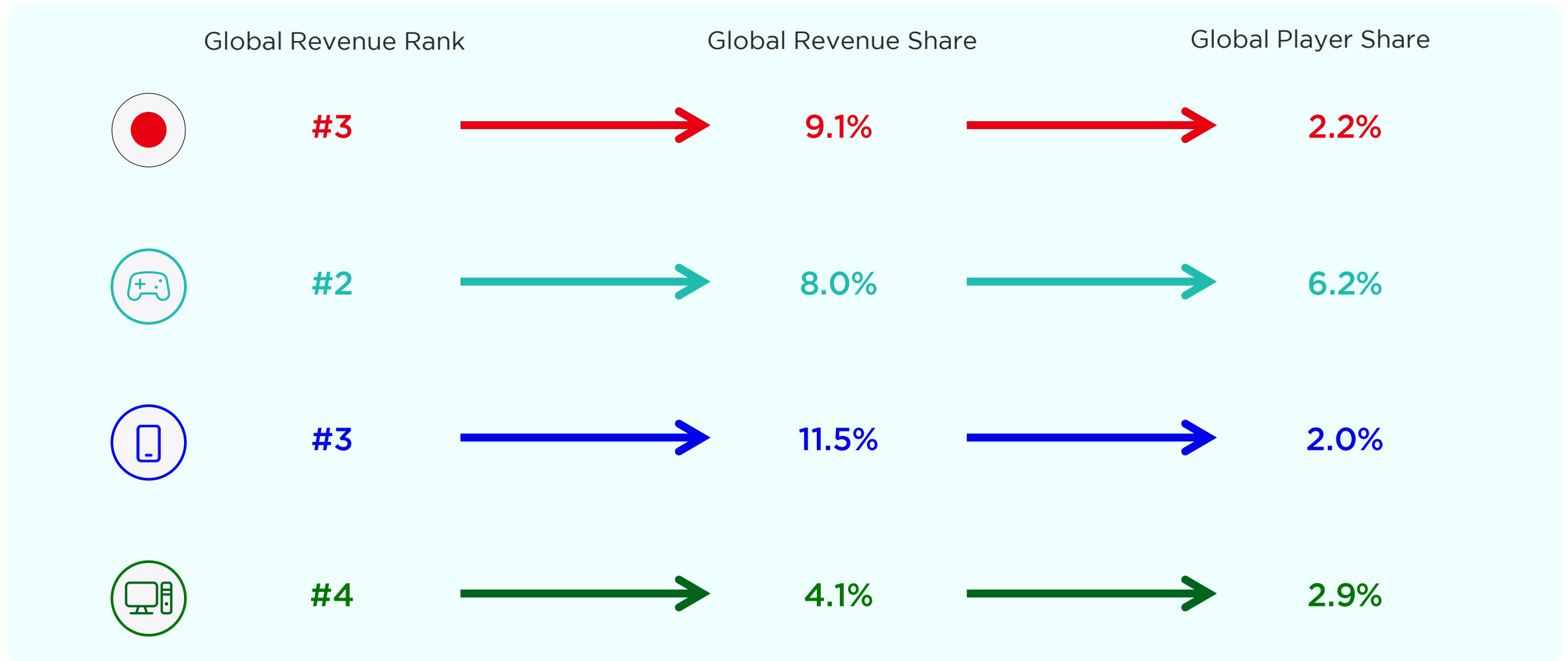


Live service game strategy



Campaign analysis

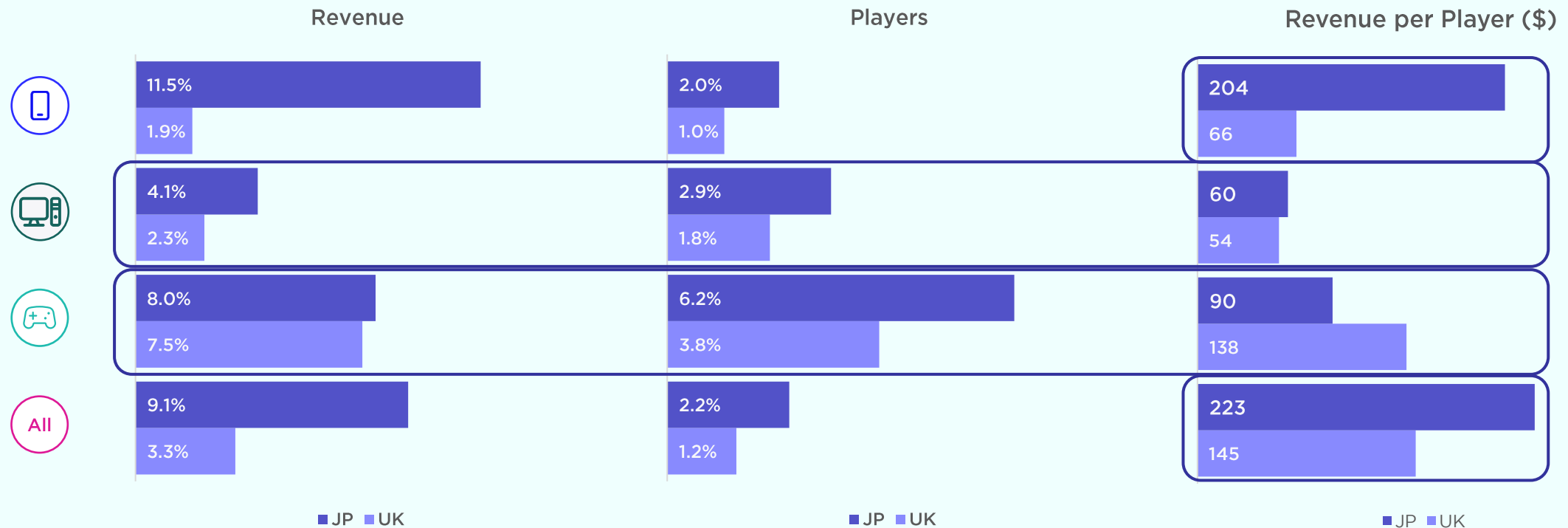
Japan is the #3 video game market in the world in 2004



How does the UK compare to Japan?

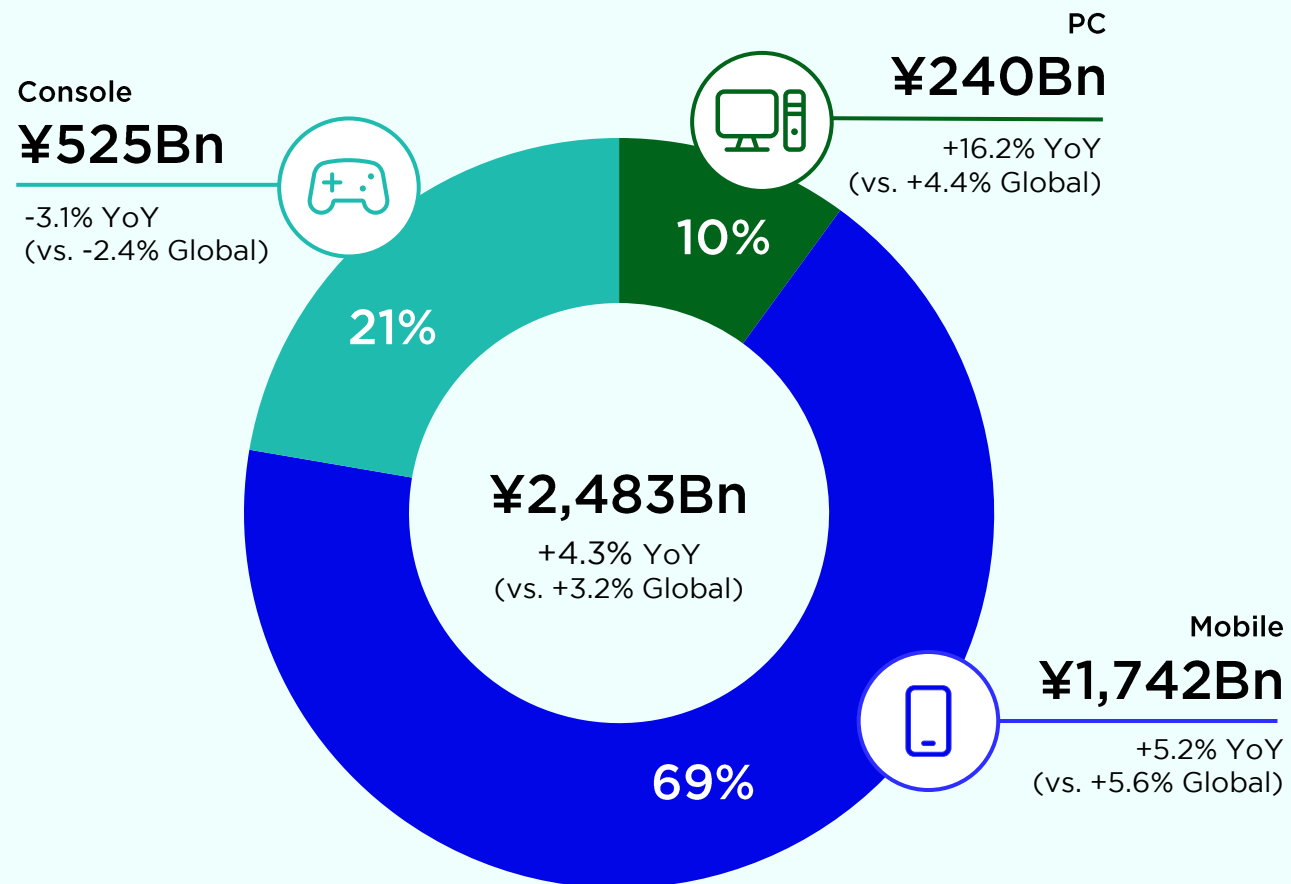
On average, a Japanese player generates much more revenue—\$223 per player, compared to \$145 in the UK.

Global share (Japan & UK) - 2024



2024 was another year of growth (in local currency)

2024 Japan revenues per platform



+16.2%

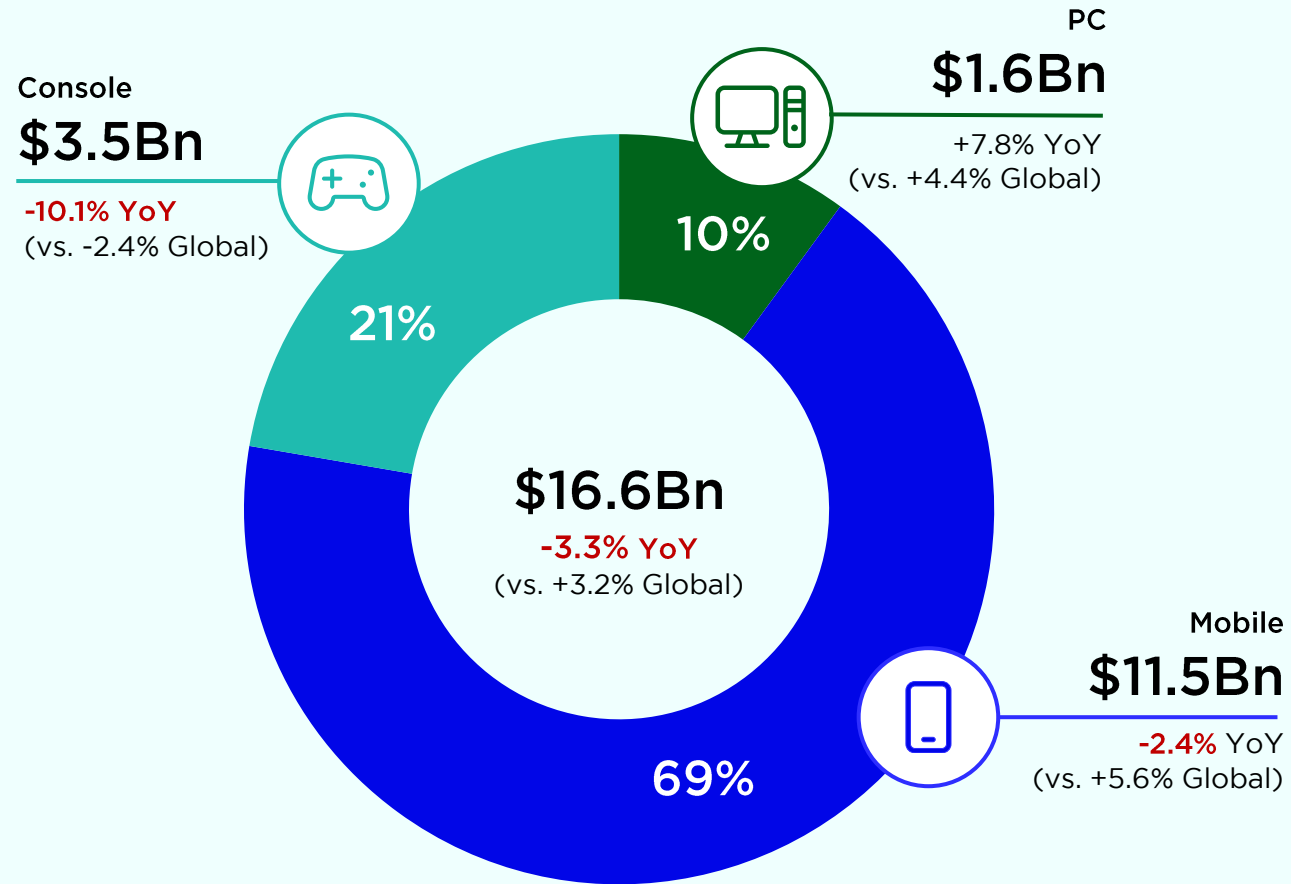
Year-on-year growth in the PC segment, another massive year

-3.1%

Year-on-year drop in the Console segment, driven by the Switch's lifecycle and a weaker premium slate

A different picture in USD

2024 Japan revenues per platform



+7.8%

Year-on-year growth in the PC segment, the only growth driver in 2024

-10.1%

Year-on-year drop in the Console segment, driven by the Switch's lifecycle.

PC Gaming has been the main growth engine for the past 7 years

PC and console software revenues in billion JPY

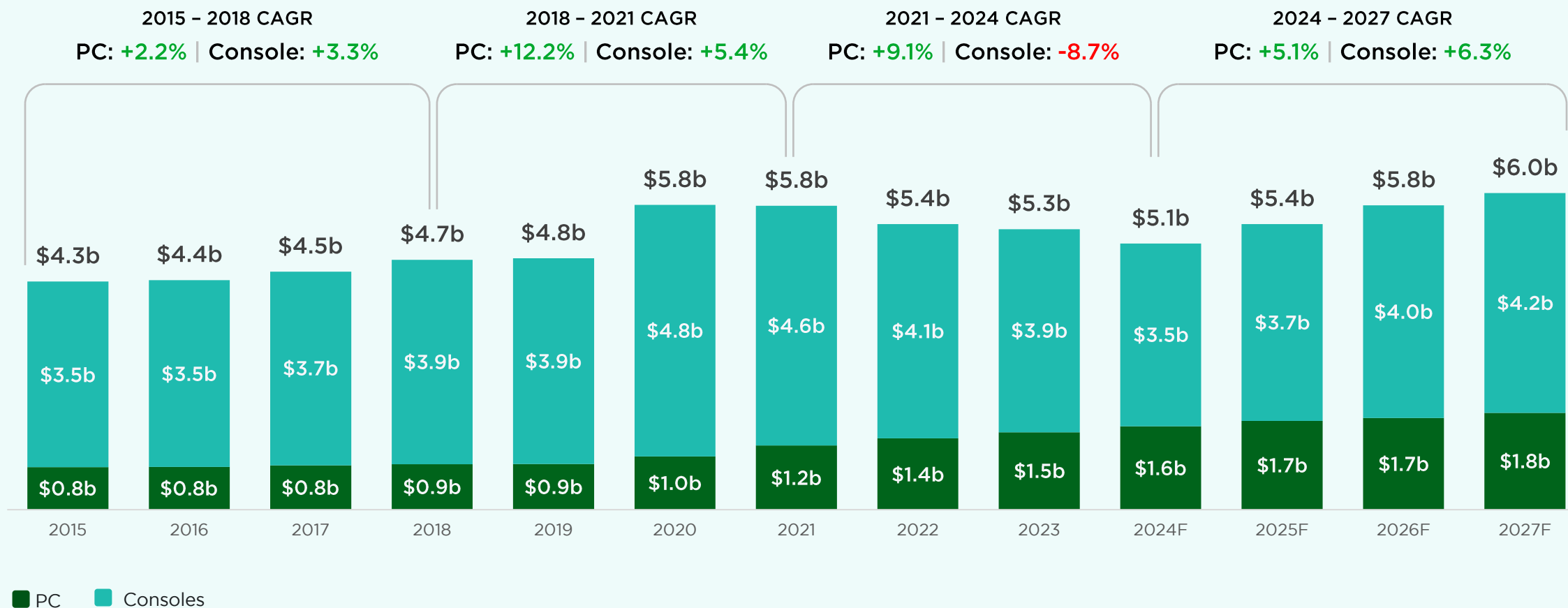
Japan | 2015-2027F



A different picture in USD

PC and console software revenues in billion USD

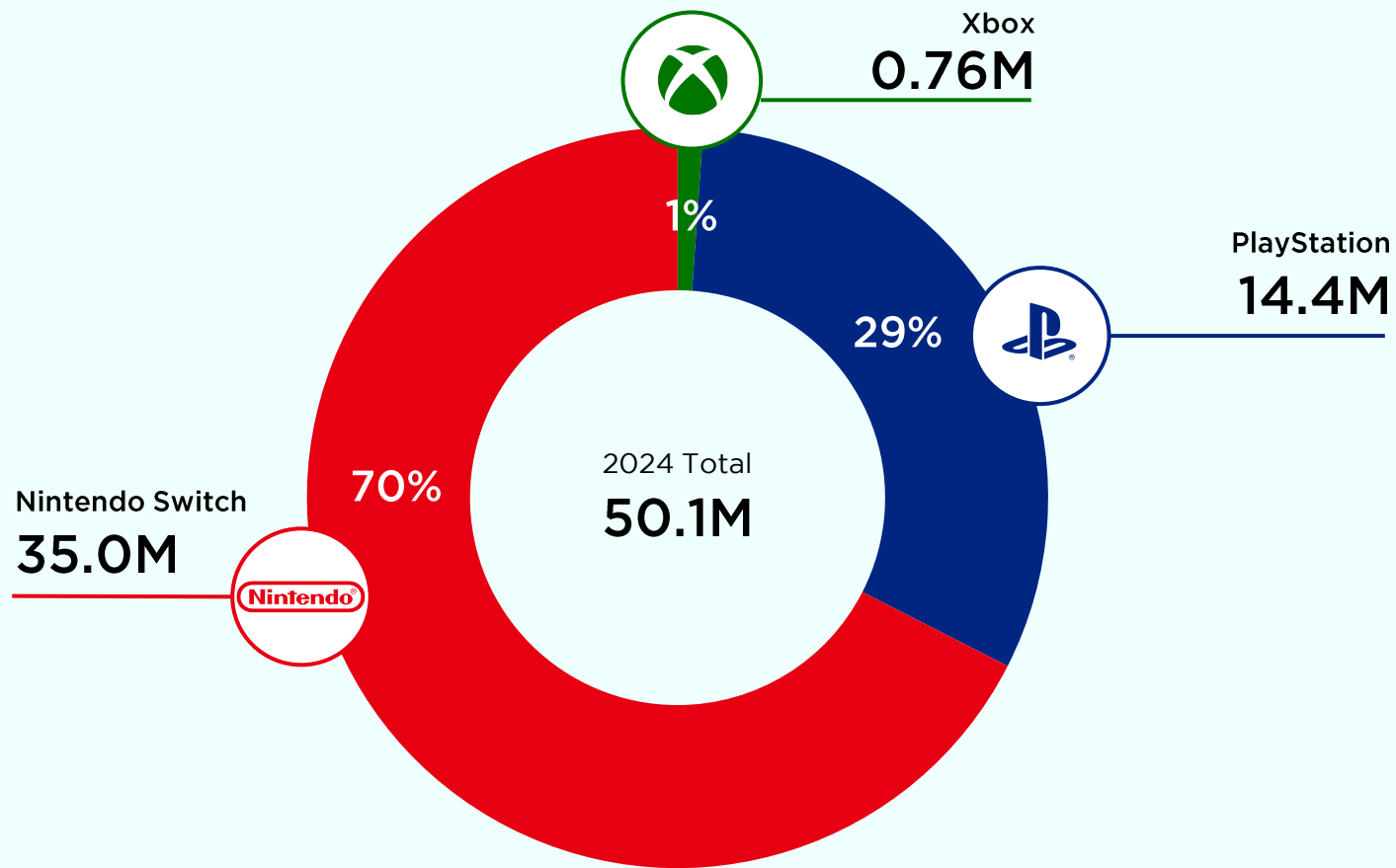
Japan | 2015-2027F



Nintendo represents the lion's share of Japan's console market

Console cumulative units sold

Japan | As of December 2024



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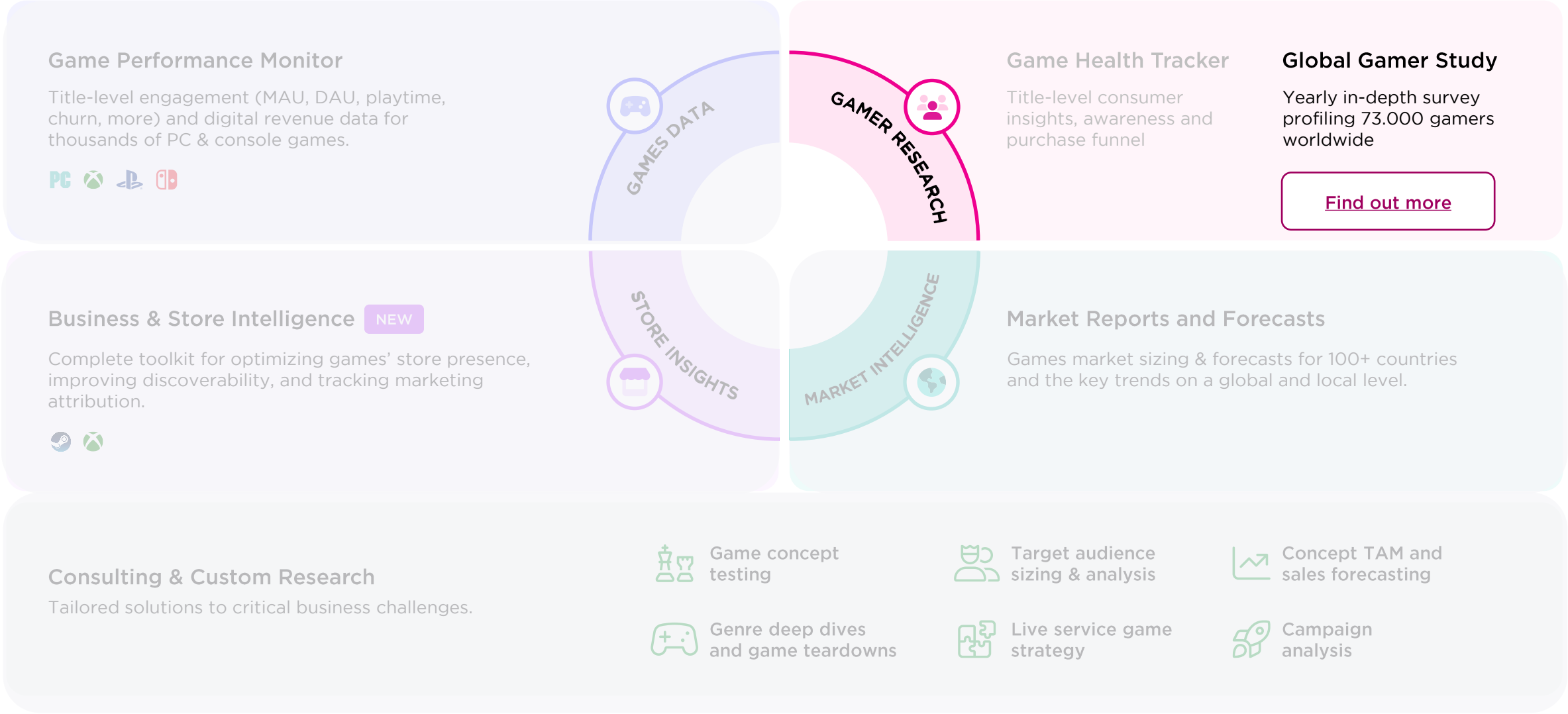
2 Players

3 Games

O2

Players

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Player Demographics

Japan's PC/console player base is older than in the West, though gender distribution is similar.

Share of PC and/or console players (past 6 months)

Base: Total players



60%



66%












71%

of total players have played on a PC and/or console in the past 6 months

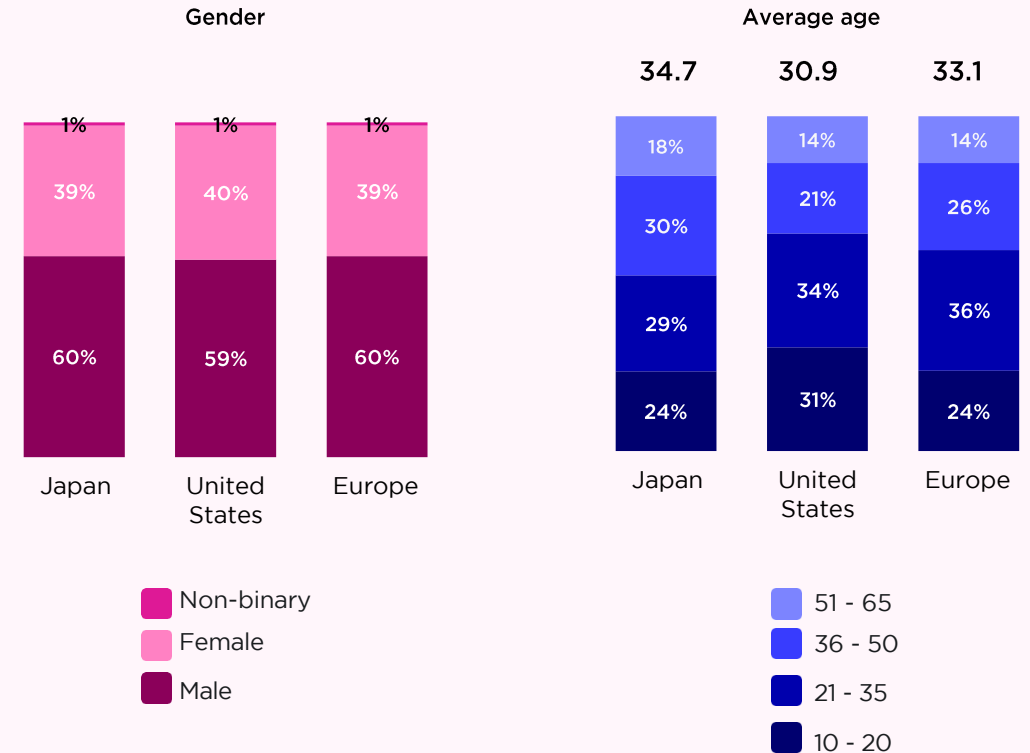
Social media/chat apps used

Base: Total PC and/or console players

| | Japan | United States | Europe |
|----|---|---|---|
| 1. |  67% |  73% |  68% |
| 2. |  62% |  69% |  67% |
| 3. |  59% |  62% |  66% |

Demographics

Base: Total PC and/or console players



Reasons to play and most appealing features of games

Japanese players value strong narratives, while Western gamers prioritize high-quality graphics and open worlds.

| | | 🇯🇵 Japan | | 🇺🇸 United States | | 🇪🇺 Europe | |
|--|----|--|-----|--|-----|--|-----|
| Top 5 reasons to play games Base: Total PC and/or console players | #1 | A deep or interesting story | 48% | A vast open world or universe to explore | 62% | A vast open world or universe to explore | 58% |
| | #2 | Open storytelling | 34% | A deep or interesting story | 61% | A deep or interesting story | 58% |
| | #3 | Progression by puzzle-solving | 34% | High-speed | 57% | Open storytelling | 52% |
| | #4 | A vast open world or universe to explore | 33% | Lots of optional tasks | 56% | Lots of optional tasks | 49% |
| | #5 | Planning, tactics, and strategy | 29% | Open storytelling | 56% | High-speed | 47% |
| Top 5 most appealing features of games Base: Total PC and/or console players | #1 | A strong narrative or story | 29% | High Quality Graphics | 36% | High Quality Graphics | 32% |
| | #2 | The theme or setting of a game | 28% | A strong narrative or story | 23% | Exploration and open worlds | 29% |
| | #3 | Interesting design | 26% | Exploration and open worlds | 23% | A strong narrative or story | 26% |
| | #4 | Harvesting, collecting or looting | 21% | Playing against others (PvP) | 22% | The theme or setting of a game | 20% |
| | #5 | Exploration and open worlds | 20% | Puzzle-solving aspects | 21% | Puzzle-solving aspects | 20% |

1 Europe includes United Kingdom, Germany, France, Netherlands, Belgium, Spain, Italy, Sweden, Finland, and Poland

Source: Newzoo Global Gamer Study 2025

Q: Reasons for playing video games, Appealing features of games

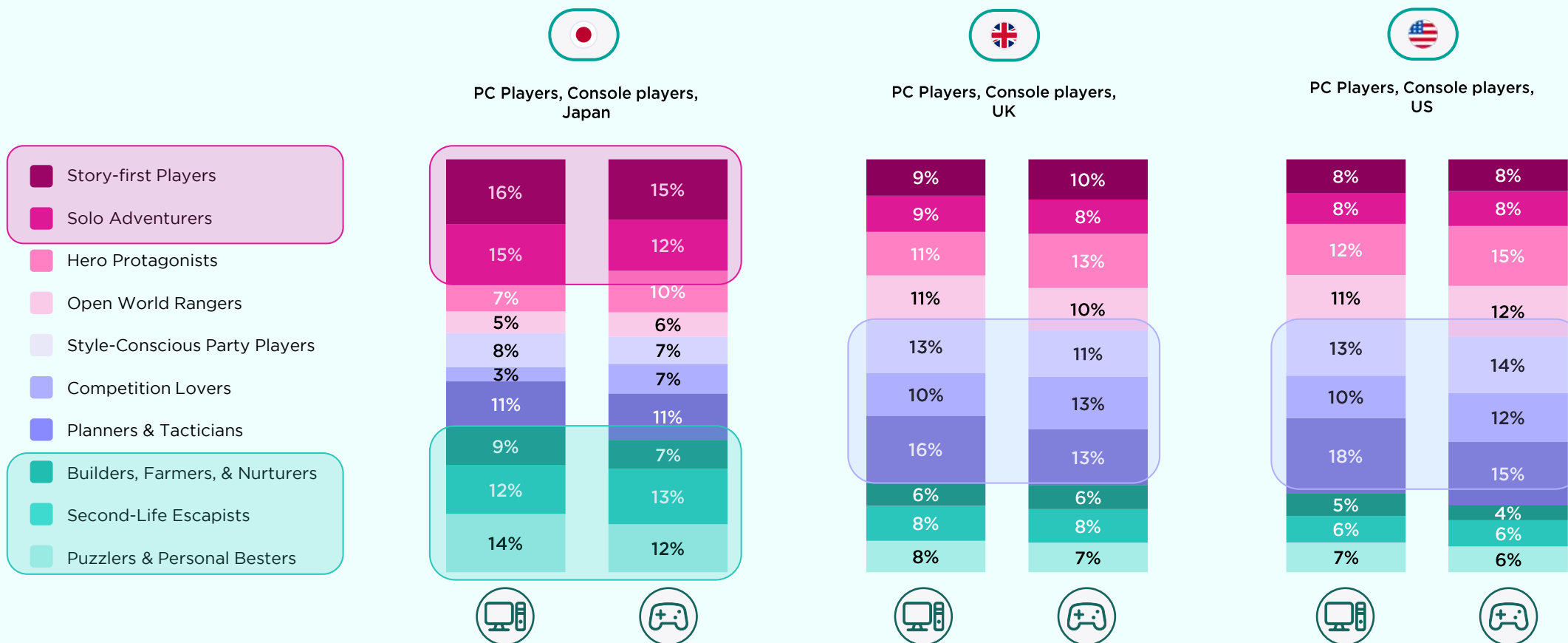
Base: PC and/or Console players (P6M) JP (n=586), US (n=1,538), EU (n=11,427)

Reasons to play and most appealing features of games

Japanese players are likelier to play solo, while UK & US players enjoy playing with or against other players.

Persona profiles by market (Japan, UK, and US)

Base: PC players, Console players in each region



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3 Games

03

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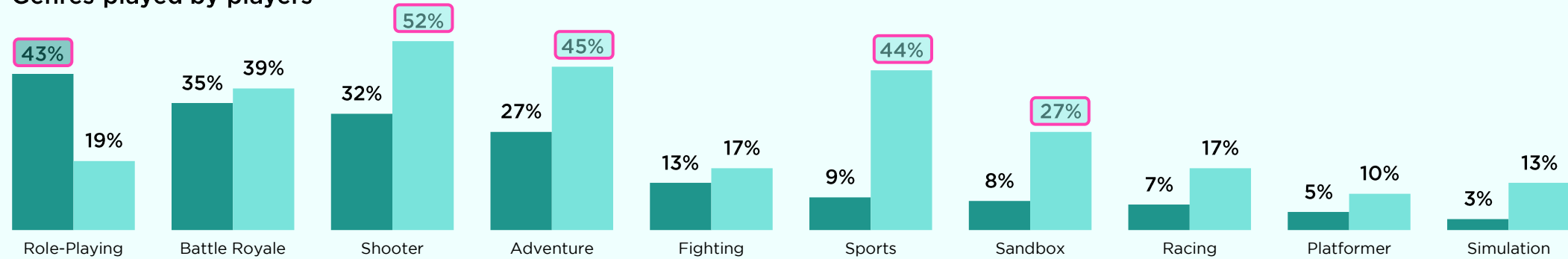
Campaign analysis

Genres and Themes | Consoles

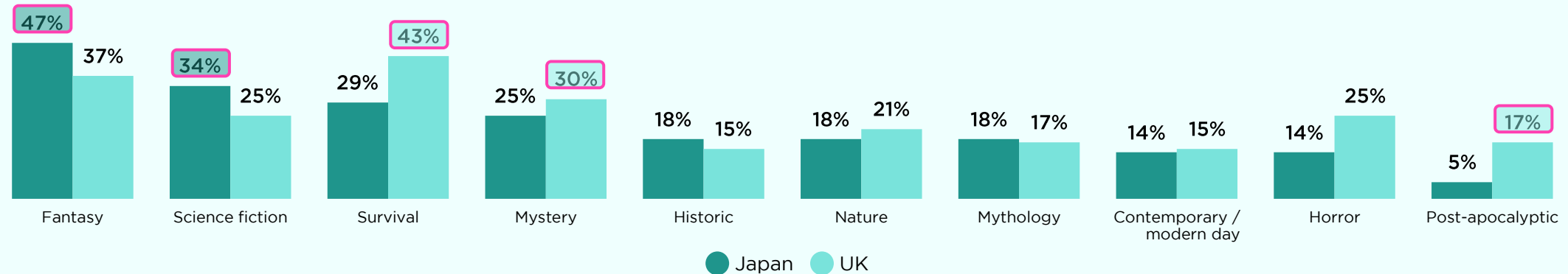
Japanese players favor Role-Playing and Battle Royale games, while UK players show a broader mix of genre preferences

Console game preferences

Genres played by players



Favorite themes

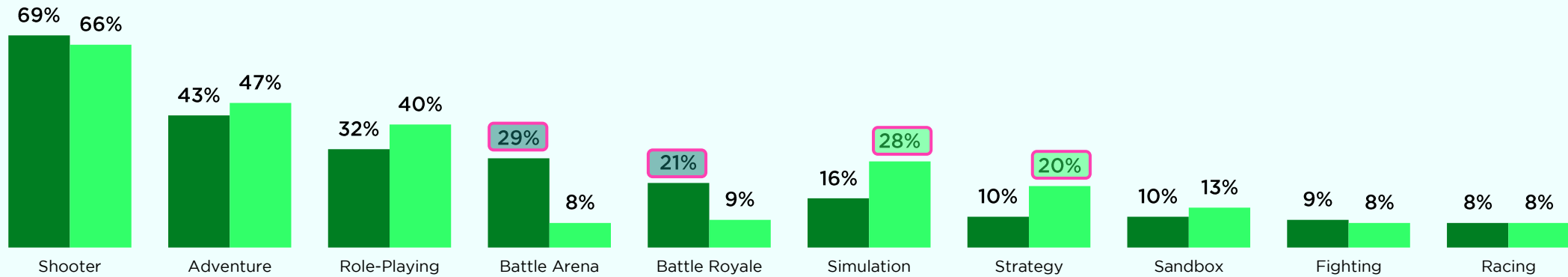


Genres and Themes | PC

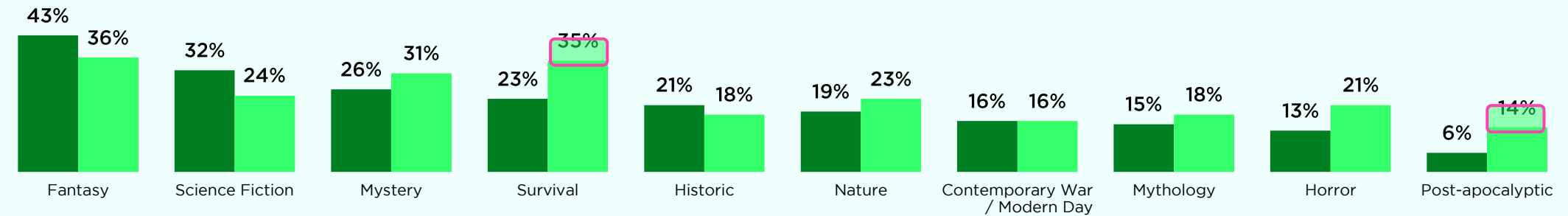
Battle Arena and Battle Royale are more present in Japan on PC

PC game preferences

Genres played by players



Favorite themes



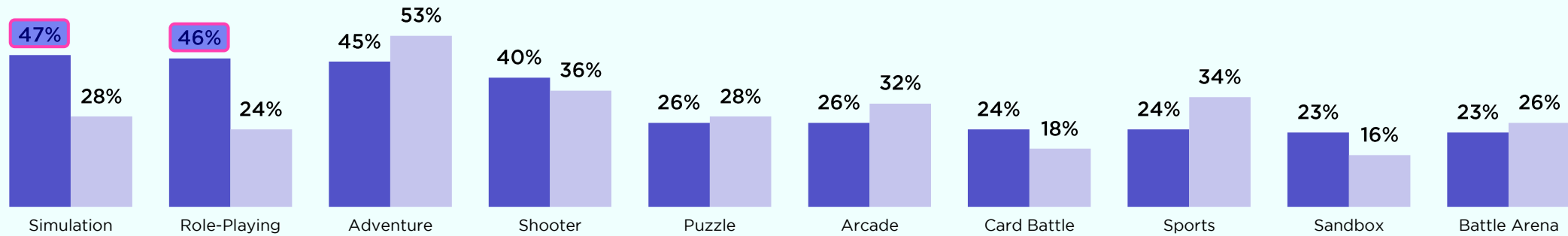
● Japan ● UK

Genres and Themes | Mobile

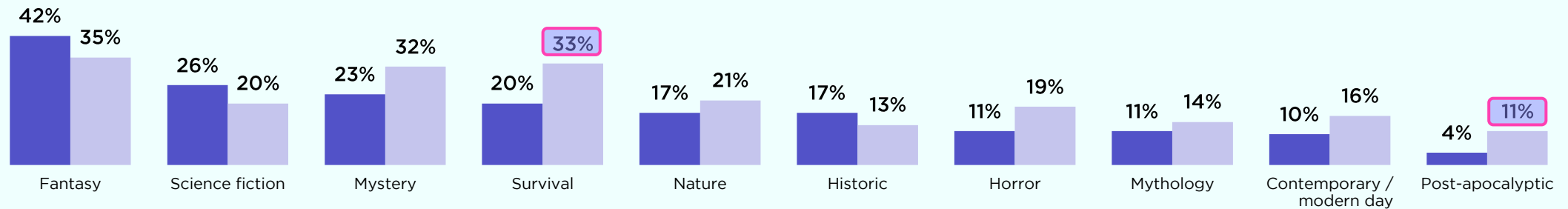
Simulation games (including character-collection sims) and Role-Playing are very popular in Japan

Mobile game preferences

Genres played by players



Favorite themes



● Japan ● UK

Top console franchises

Japanese players gravitate toward domestic franchises, especially those from Nintendo.

Top franchises played in the last 6 months by Console players



#1



#2



#3



#4



#5



#6



#7



#8



#9



#10

Top PC franchises

Global franchises are more popular on PC

Top franchises played in the last 6 months by PC players

MINECRAFT

MONSTER
HUNTER

FINAL FANTASY

Uma Musume
Pretty Derby

FORTNITE

RESIDENT EVIL

APEX
— LEGENDS —

LEAGUE OF
LEGENDS




















STAR
WARS













grand
theft
auto

*Uma Musume Pretty Derby

Premium: Top console games feature single-player adventure titles, while PC players engage with more co-op-focused

Top 10 by lifetime players* | Japan | PC and Console (excl. Switch) | 2022-2025 releases

| |  | Title | Publisher | % of 37 Markets |
|---|---|-----------------------------------|--------------------------------|-----------------|
|  |  | Monster Hunter Wilds | Capcom | 37.6% |
|  |  | Elden Ring | Bandai Namco | 7.4% |
|  |  | Street Fighter 6 | Capcom | 18.3% |
| |  | Hogwarts Legacy | Warner Bros. | 3.9% |
|  |  | Final Fantasy XVI | Square Enix | 18.9% |
|  |  | Armored Core VI: Fires of Rubicon | Bandai Namco | 35.2% |
|  |  | Gran Turismo 7 | Sony Interactive Entertainment | 10.7% |
|  |  | Final Fantasy VII Rebirth | Square Enix | 22.6% |
| |  | ARK: Survival Ascended | Studio Wildcard | 7.9% |
|  |  | Earth Defense Force 6 | D3 Publisher | >90% |












| |  | Title | Publisher | % of 37 Markets |
|---|---|----------------------|--------------------------------|-----------------|
| |  | Lethal Company | Zeekerss | 2.7% |
| |  | Diablo IV | Blizzard Entertainment | 2.9% |
| |  | R.E.P.O. | Semiwork | 3.3% |
| |  | Raft | Redbeet Interactive | 2.9% |
| |  | Baldur's Gate 3 | Larian Studios | 2.1% |
|  |  | Elden Ring | Bandai Namco | 3.0% |
| |  | Content Warning | Wilnyl | 3.6% |
| |  | Helldivers 2 | Sony Interactive Entertainment | 2.0% |
| |  | BattleBit Remastered | SgtOkiDoki | 2.7% |
| |  | Buckshot Roulette | Critical Reflex | 4.3% |












*as of end of May 2025

Source: Newzoo Game Performance Monitor | 37 Markets (excluding China, India) | PC, PlayStation, Xbox

Free to Play: PvP shooters dominate across PC and console

Top 10 by lifetime players* | Japan | PC and Console (excl. Switch) | 2022-2025 releases

|  | Title | Publisher | % of 37 Markets |
|---|--|------------------------|-----------------|
|  | Apex Legends | Electronic Arts | 8.6% |
|  | Fortnite | Epic Games | 3.3% |
|  | Rainbow Six: Siege | Ubisoft | 5.2% |
|  | Overwatch 1 & 2 | Blizzard Entertainment | 5.0% |
|  | Fall Guys | Epic Games | 4.7% |
|  | Call of Duty: Modern Warfare I | Activision Publishing | 2.6% |
|  | Genshin Impact | MiHoYo | 14.4% |
|  | Phantasy Star Online 2 New Genesis | Sega | 39.7% |
|  | Destiny 2 | Bungie | 3.4% |
|  | Mobile Suit Gundam: Battle Operation 2 | Bandai Namco | 52.3% |

|  | Title | Publisher | % of 37 Markets |
|---|-----------------------|-----------------------|-----------------|
|  | Counter-Strike 2 & GO | Valve | 3.3% |
|  | Dota 2 | Valve | 5.0% |
|  | PUBG: Battlegrounds | Krafton | 3.3% |
|  | Apex Legends | Electronic Arts | 4.5% |
|  | Rainbow Six: Siege | Ubisoft | 3.5% |
|  | Unturned | Smartly Dressed Games | 3.4% |
|  | Team Fortress 2 | Valve | 2.8% |
|  | Genshin Impact | MiHoYo | 4.3% |
|  | Warframe | Digital Extremes | 3.7% |
|  | Valorant | Riot Games | 2.3% |

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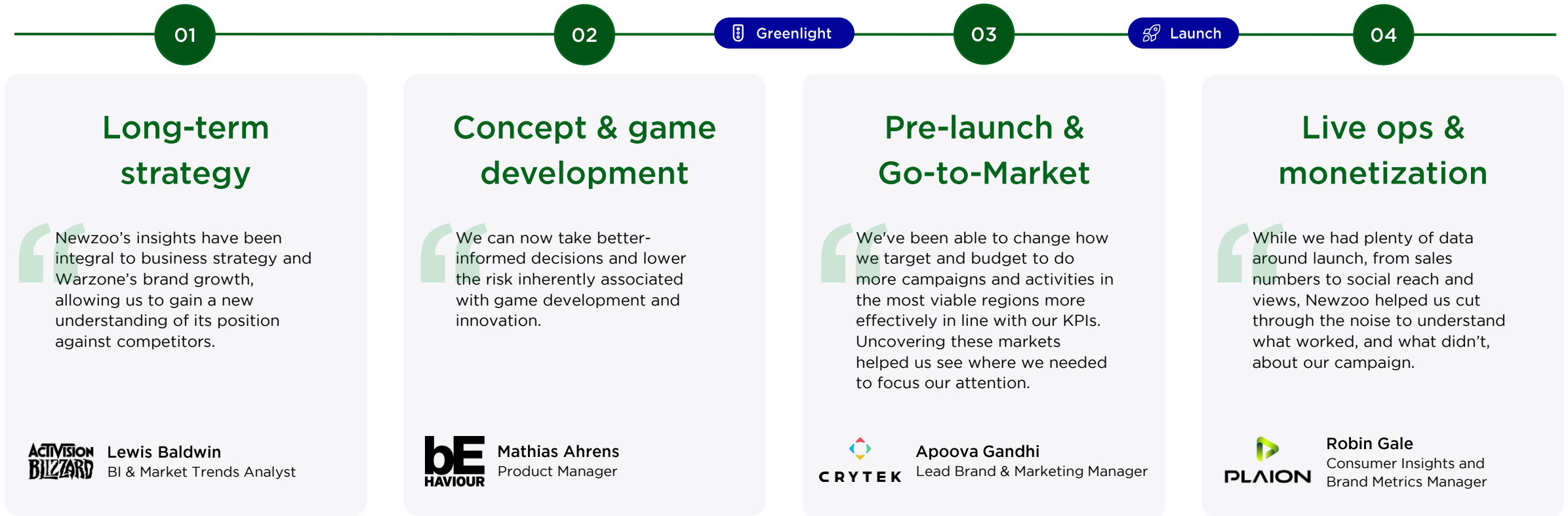
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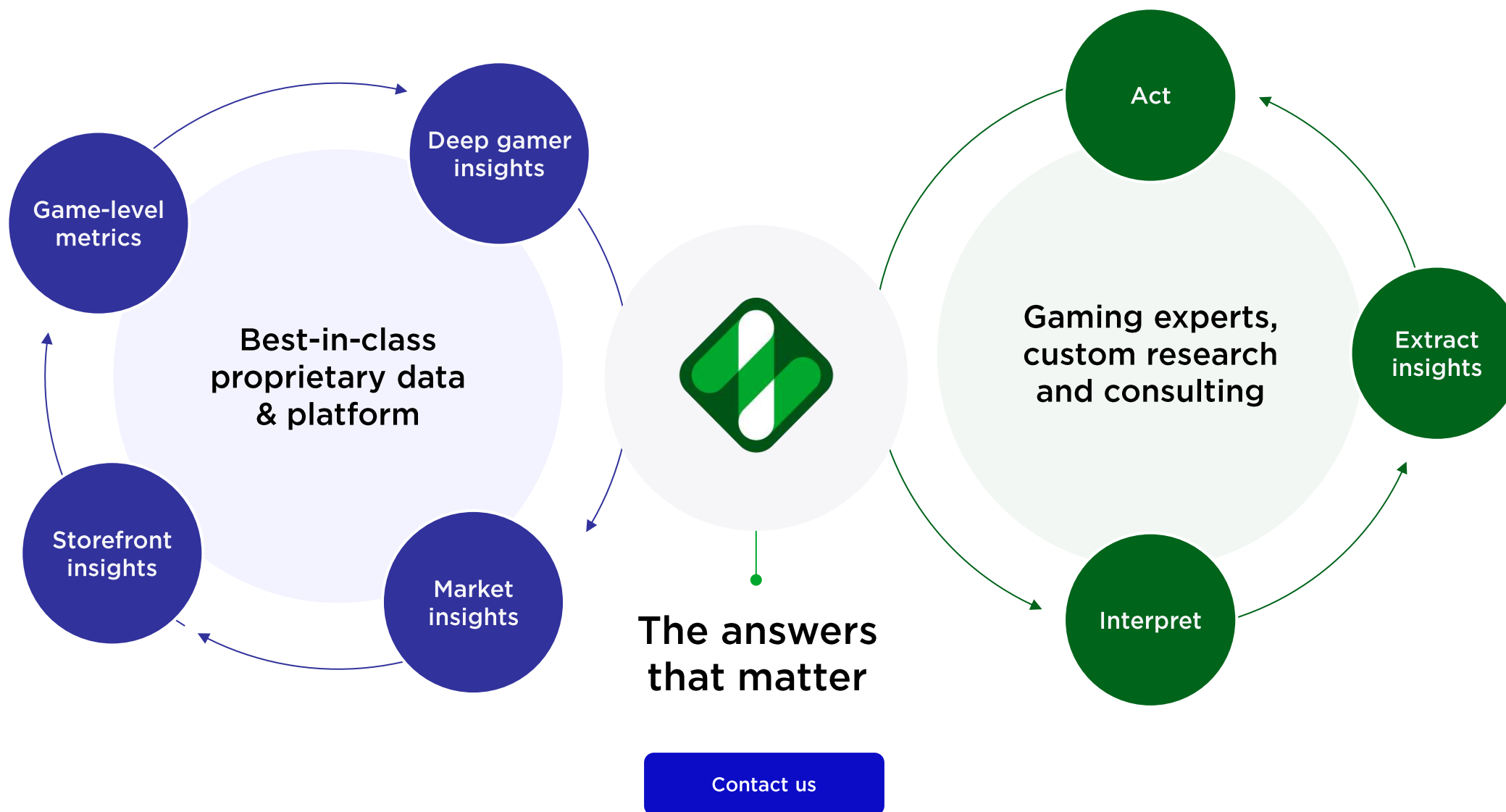
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