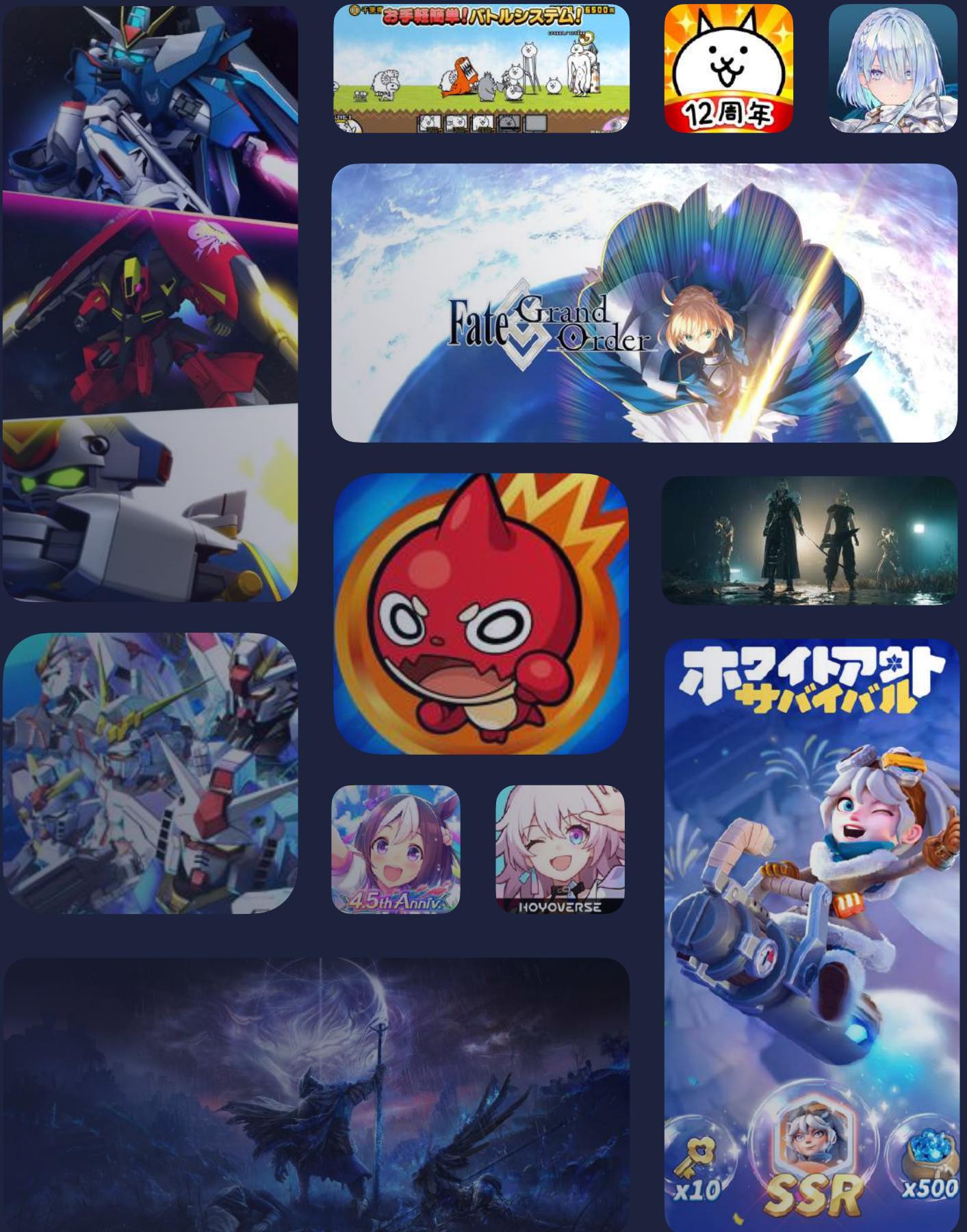




Japan Game Market Insights 2025



Sensor Tower

Introduction/Overview

Sensor Tower is the leading source of mobile app, digital advertising, retail media, and audience insights for the largest brands and app publishers across the globe.

With a mission to measure the world's digital economy, Sensor Tower's award-winning platform delivers unmatched visibility into the mobile app and digital ecosystem, empowering organizations to stay ahead of changing market dynamics and make informed, strategic decisions.

Founded in 2013, Sensor Tower's mobile app insights have helped marketers, app, and game developers demystify the mobile app landscape with visibility into usage, engagement, and paid acquisition strategies. Today, Sensor Tower's digital market insights platform has expanded to include Audience, Retail Media, and Pathmatics Digital Advertising Insights, helping brands and advertisers understand their competitor's advertising strategies and audiences across web, social, and mobile.

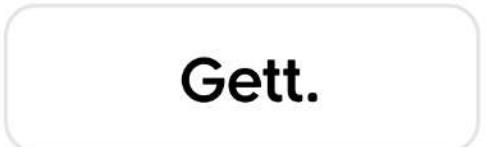
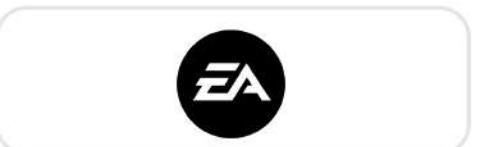


Press Inquiries: press-apac@sensortower.com

Business Inquiries: sales@sensortower.com

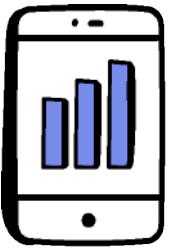
Sensor Tower | Our Customers

Top publishers trust Sensor Tower insights to grow their business.



Note: Top publishers by app store revenue | Source: Sensor Tower

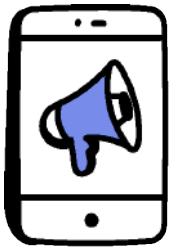
Sensor Tower Solutions



Sensor Tower **App Performance Insights**

For those who need visibility into the mobile app ecosystem.

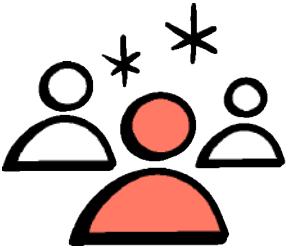
Enjoy insight into: app rankings, downloads, and revenue; active users, demographics, retention, sessions, and time spent; app ratings and reviews, keywords, search ads, and more.



Sensor Tower **App Advertising Insights**

For those who need visibility into paid user acquisition strategies.

Enjoy insight into: global and regional share of voice (SOV) across apps and the biggest mobile app ad networks, top advertisers, publishers, creatives, and more.



Sensor Tower **Audience Insights**

For those who need visibility into your existing, competitor, and potential new audiences.

Enjoy insight into: which apps consumers are actually interacting with (app engagement) AND which ads they're seeing (ad exposure).

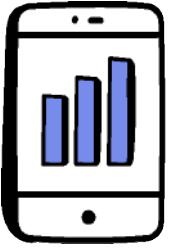


Sensor Tower **Pathmatics Digital Advertising Insights**

For those who need visibility into the digital ad ecosystem.

Gain insight into: ads served, spend and impression estimates, SOV, and more across key channels, like: Facebook, Instagram, X (formerly Twitter), OTT, YouTube, display, video, and others.

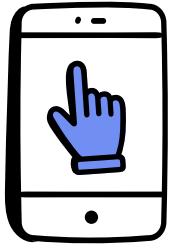
Sensor Tower Solutions



Gaming Insights

For those who need the deepest look into the mobile gaming ecosystem.

Enjoy insight into: downloads, revenue, RPD, and ARPDAU beyond the top-level category (Lifestyle & Puzzle) and can drill deeper into genres (Puzzle, Arcade, etc.) and sub-genres (Swap, Word, etc.).



Sensor Tower **Advanced Usage Insights**

For those who need the deepest look into app user engagement.

Enjoy insight into: sessions per user; time spent; time of day; days used per time period; new, retained, resurrected, and churned user trends; and cohort usage overlap.



Sensor Tower **Pathmatics Retail Media Insights**

For those who need industry-first insight into on- and off-site retail media network investments

Enjoy insight into: ad spend, media mix, share of wallet, impressions, and SOV for brands and products across retailers – gaining a coveted view into the co-branded digital ad ecosystem and retail media networks.



Sensor Tower **Video Game Insights**

Discover top game trends on PC and Console platforms

Get deep insights into key metrics like sales, revenue, DAU, and MAU for over 140,000 PC and Console games across 100+ global markets. Analyze shifts in player behavior to uncover critical intelligence on player acquisition and retention.

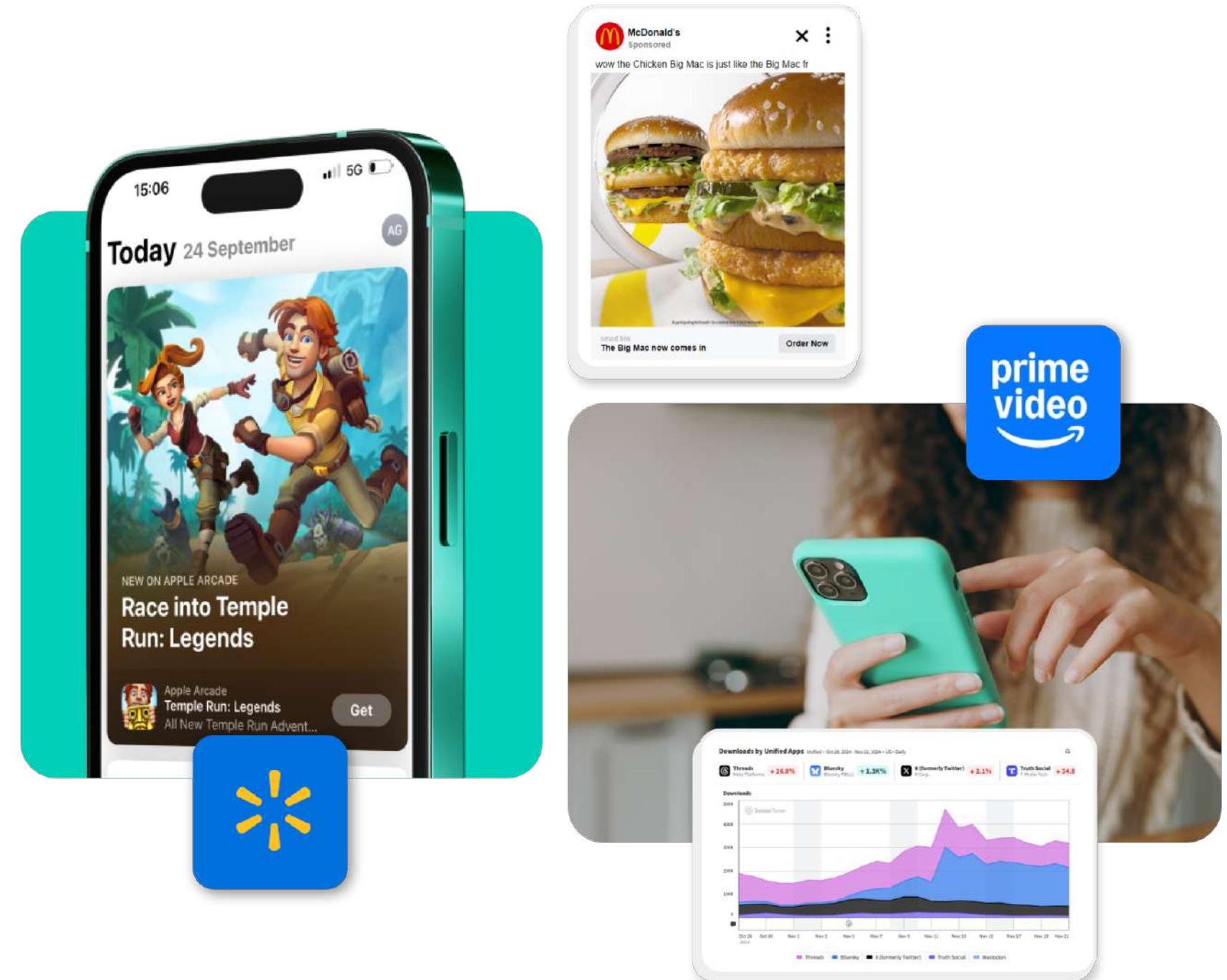
Sensor Tower

Executive Summary

This report provides an in-depth look at Japan's 2025 gaming landscape, covering mobile (App Store and Google Play), PC, console, and digital advertising. It explores revenue and download trends, genre performance, the global footprint of Japanese games, and key advertising insights, while profiling top titles by revenue and downloads. Case studies—including *SD Gundam G Generation ETERNAL*, *The Battle Cats*, and *Whiteout Survival*—show how leading titles combine live ops, effective monetization strategies, and innovative advertising campaigns to sustain engagement and reinforce Japan's position as a global gaming powerhouse.

Clarification on Revenue and Downloads Data

Sensor Tower's revenue figures are derived from estimated in-app purchase (IAP) revenue on the App Store and Google Play, excluding ad revenue, revenue from third-party Android app-store sales, and direct payment revenue from developers' websites and other channels. Unless explicitly stated as net revenue, the revenue figures shown represent gross revenue (before platform deduction). Sensor Tower's downloads figures are derived from estimated downloads on the App Store and Google Play, excluding pre-installs, duplicate downloads, and downloads from third-party Android app-store. Google Play is not available in Mainland China.



Sensor Tower

Data & Methodology

Sensor Tower's **Pathmatics** empowers you to uncover insights into the digital advertising ecosystem, minimize ineffective ad spend, and enhance the precision of your advertising campaigns. With Pathmatics, you gain visibility into the digital advertising landscapes across markets including the United States, Australia, Brazil, Canada, France, Germany, Italy, India, Japan, Mexico, New Zealand, Spain, South Korea, and the United Kingdom. Pathmatics provides comprehensive estimates on ad placements, spending, impressions, and share of voice (SOV), as well as in-depth analysis of brands' advertising strategies on platforms like Facebook, Instagram, X (formerly Twitter), YouTube, and TikTok, across formats such as display banners, videos, mobile, and OTT.

Pathmatics collects digital ad samples from the web and utilizes statistical sampling methods to estimate the impressions, cost-per-thousand impressions (CPM), and expenditure associated with each creative.

Digital Advertising Channels Supported by Pathmatics Across Markets

| | Desktop Display and Video | Facebook Instagram | LINE | LinkedIn | Mobile App Ad Networks | Mobile Display and Video | OTT | Pinterest | Reddit | Snapchat | TikTok | X | YouTube |
|-----------------------|---------------------------|--------------------|------|----------|------------------------|--------------------------|-----|-----------|--------|----------|--------|---|---------|
| United States | ● | ● | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| Australia | ● | ● | | | | ● | | ● | ● | ● | ● | | ● |
| Brazil | | ● | | ● | | | | ● | ● | | ● | ● | |
| Canada | ● | ● | | ● | ● | ● | | ● | ● | ● | ● | | ● |
| France | | ● | | ● | | | | ● | ● | ● | ● | | ● |
| Germany | ● | ● | | ● | ● | ● | | ● | ● | ● | ● | | ● |
| India | | ● | | | | | | ● | ● | ● | | ● | |
| Italy | | ● | | | | | | ● | ● | ● | ● | | ● |
| Japan | | ● | ● | | ● | | | | | | ● | ● | ● |
| Mexico | | ● | | | | | | | | | ● | | ● |
| New Zealand | ● | ● | | | | ● | | | | | | | ● |
| South Korea | | ● | | | ● | | | | | | ● | | ● |
| Spain | | ● | | | | | | ● | ● | ● | ● | ● | ● |
| United Kingdom | ● | ● | | ● | ● | ● | | ● | ● | ● | ● | ● | ● |

Agenda

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| Overview of Japan Mobile Game Market | 09 |
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Overview of Japan Mobile Game Market

Beyond Scale: Inside Japan's High-Value Mobile Gaming Economy

In 2025, Japan reaffirmed its position as a global mobile gaming powerhouse, generating **\$11 billion in IAP revenue**—ranking second only to China's iOS market in Asia. While downloads held at a more modest **628 million**, this performance underscores the resilience of Japan's mature gaming ecosystem, shaped by decades of console heritage, iconic IPs, and a culture where gaming is deeply embedded in daily life.

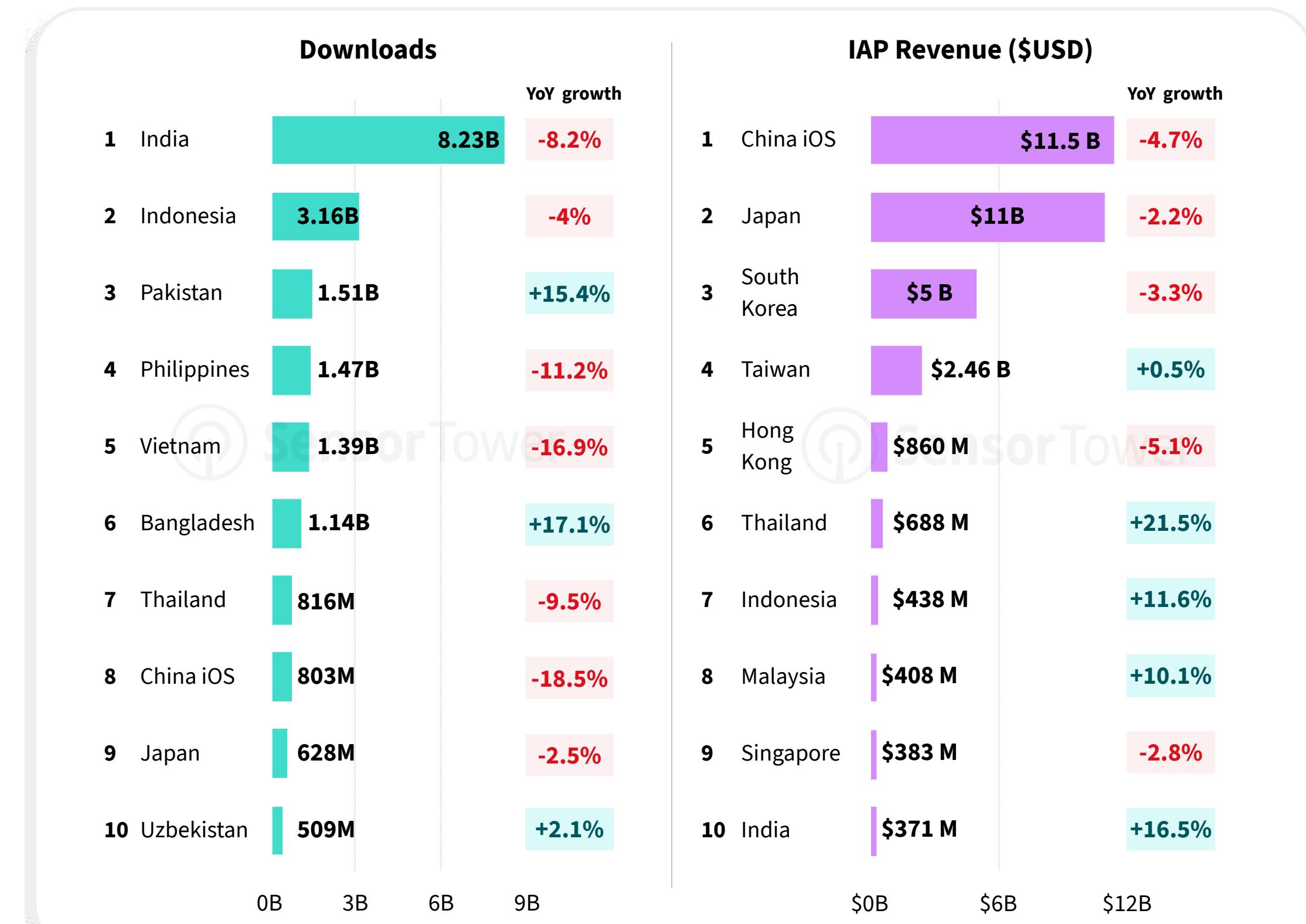
Japan's defining advantage remains its exceptionally high ARPU. Despite slight market contraction, the country continues to deliver outsized profitability, driven by loyal player bases and efficient monetization strategies. This dynamic reinforces Japan's role as one of the world's most lucrative and strategically important mobile gaming markets.

Data Source: Sensor Tower App Performance Insights as of September 1, 2025. Yearly data are based on a 12-month rolling total ending in July of each year (e.g., August 2024–July 2025 for 2025).

Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross—inclusive of any percent taken by the app stores.

Top Mobile Game Markets in Asia

12 Months to July 2025



Japan Mobile Games: Sustained IAP Spending as Downloads Plateau

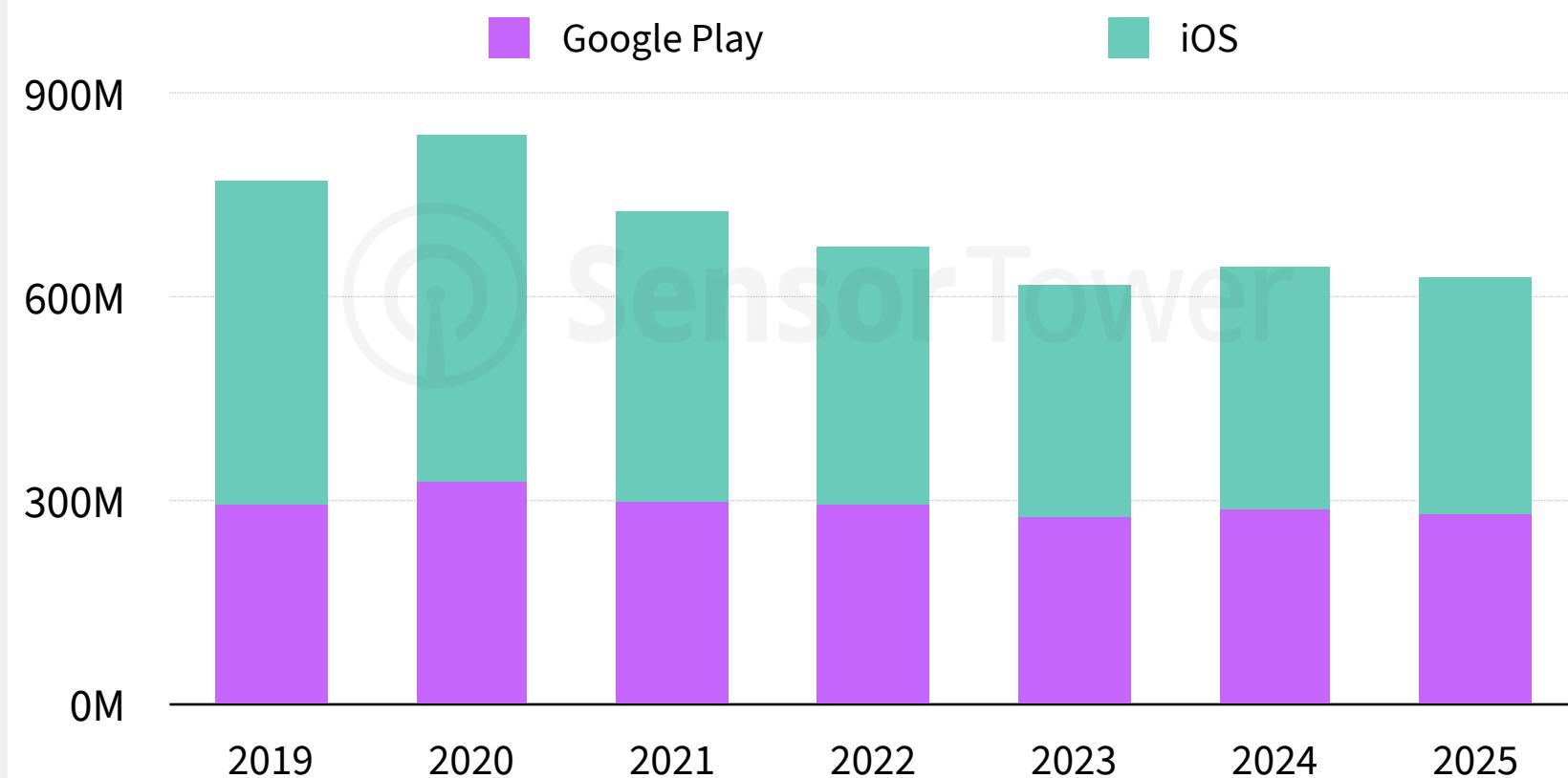
Data Source: Sensor Tower App Performance Insights as of September 1, 2025. Yearly data are based on a 12-month rolling total ending in July of each year (e.g., August 2024–July 2025 for 2025).

Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. Revenue is gross — inclusive of any percent taken by the app stores.

JPY to USD conversions reflect exchange rate fluctuations over time, with rates sourced from the Bank of Japan.

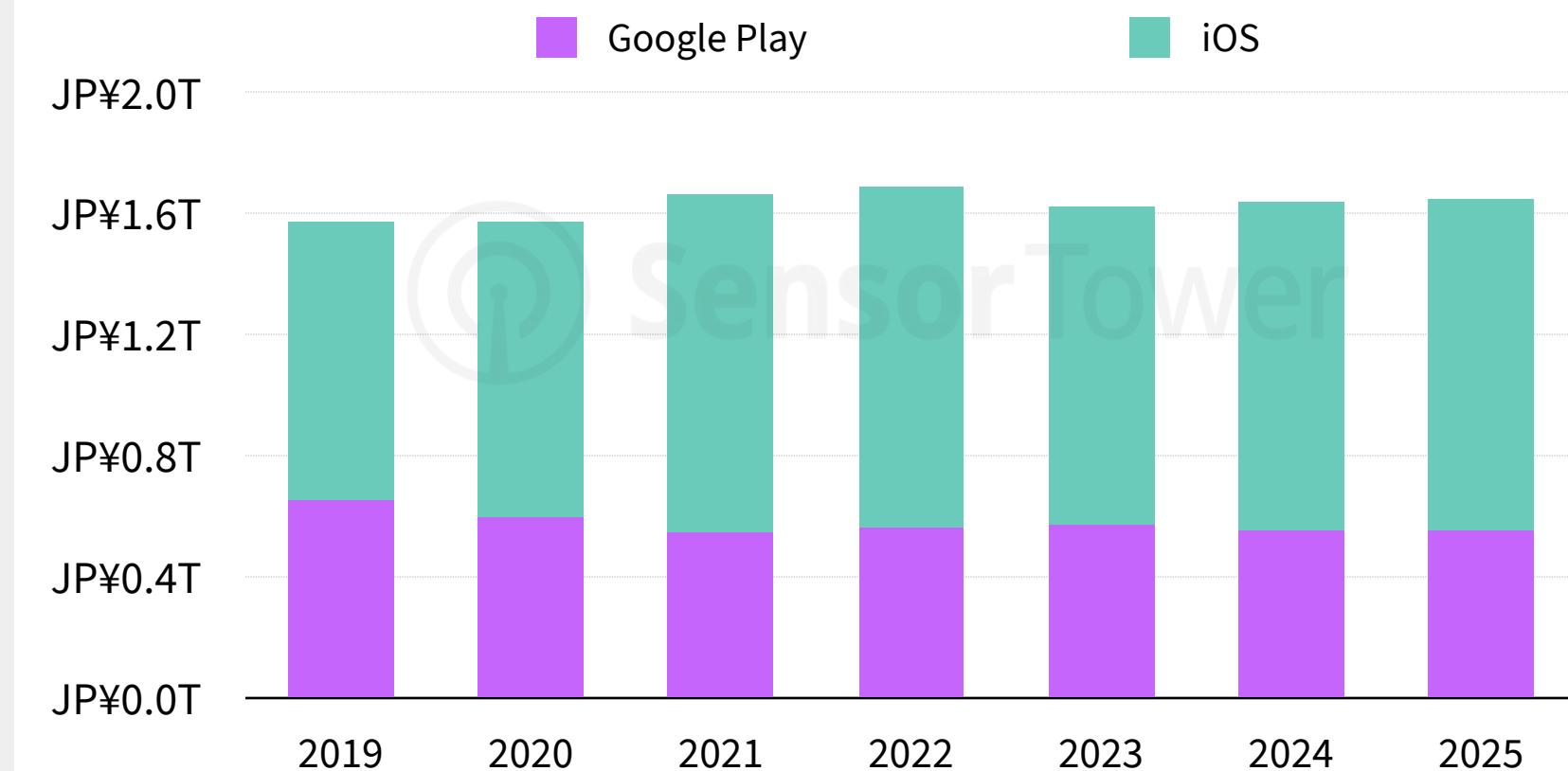
Mobile Game Downloads Trends in Japan

2019 - 2025



Mobile Game IAP Revenue Trends in Japan

2019 - 2025



Japan's mobile game downloads have plateaued since peaking in 2020, stabilizing above **600 million annually**. iOS continues to lead, underscoring Apple's dominance, while Google Play holds a steady but smaller share, reflecting long-standing platform preferences.

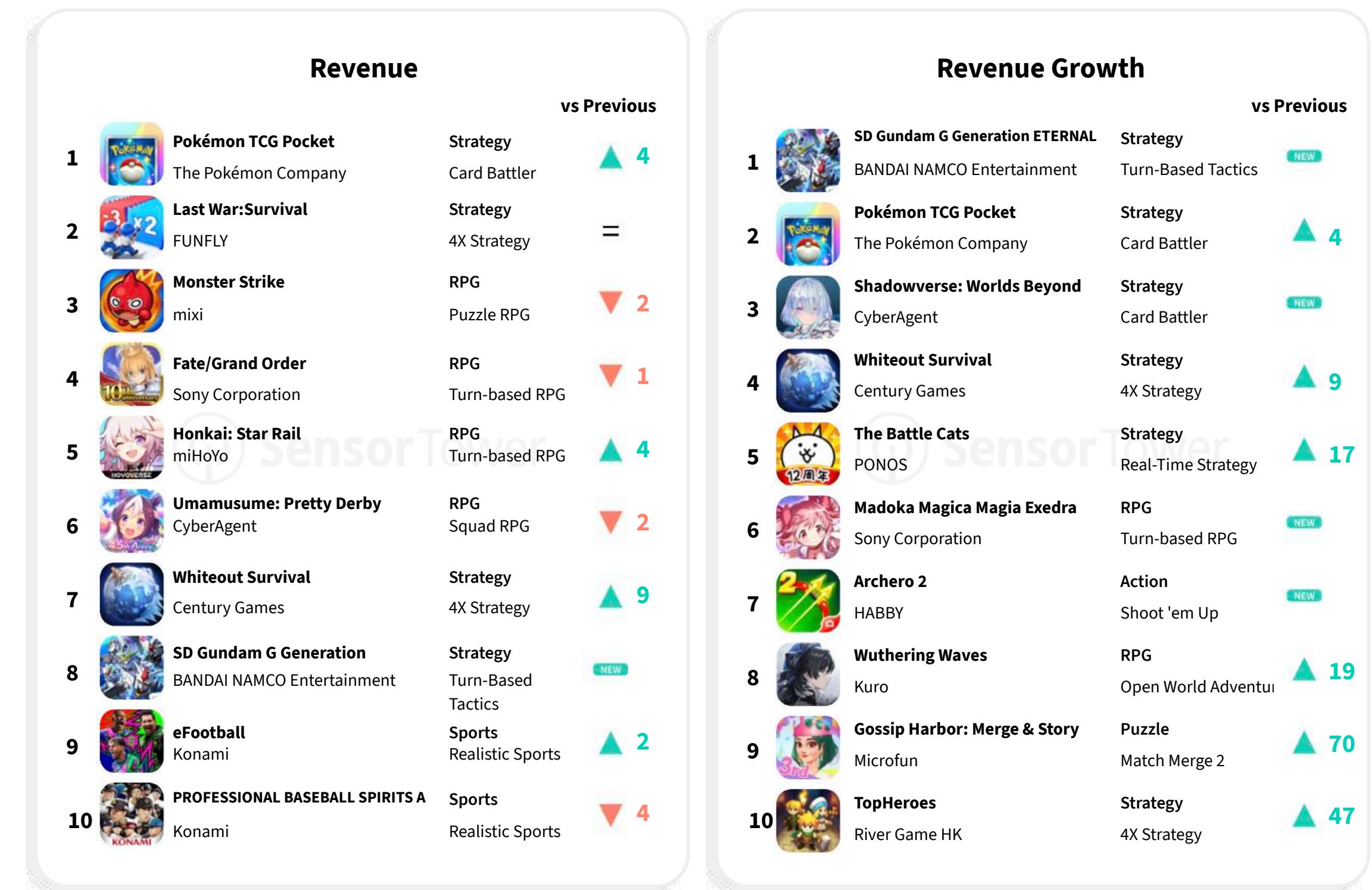
Despite declining downloads, IAP revenue remains strong, consistently exceeding **JP¥ 1.6 trillion**. iOS drives the majority of spend through its high-value users, while Google Play contributes steady growth. This highlights Japan's mature, loyal market, where retention and monetization sustain revenues even amid slowing user acquisition.

Japan's 2025 Mobile Game Leaders: Pokémon Surges, Strategy Genre Expands

Pokémon TCG Pocket claimed the top revenue spot in Japan, highlighting the enduring strength of established IPs. Strategy titles surged, with Whiteout Survival entering the top 10, while RPG stalwarts Monster Strike and Fate/Grand Order remain firmly in the top 10, underscoring their enduring relevance even as player attention shifts within Japan's competitive market.

Revenue growth rankings emphasize emerging hits and genre diversification. SD Gundam G Generation ETERNAL and Shadowverse: Worlds Beyond debuted strongly, while The Battle Cats and Gossip Harbor posted remarkable climbs. This signals robust demand for both nostalgic franchises and new mechanics, driving growth opportunities across card battlers, RPGs, and strategy subgenres.

2025 Japan Top 10 Mobile Games by Revenue Unified • Jan 1, 2025 - July 31, 2025



Data Source: Sensor Tower App Performance Insights as of September 1, 2025.

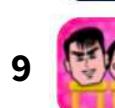
Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. Revenue is gross — inclusive of any percent taken by the app stores.

Japan's 2025 Mobile Game Downloads: Puzzle Boom Meets Strategy Strength

Pokémon TCG Pocket maintained its top download spot, while *SD Gundam G Generation ETERNAL* debuted strongly at No. 2, reflecting strategy games' enduring appeal. Puzzle games surged, with *Block Blast!*, *Color Block Jam*, and *Car Jam* climbing into the top five, highlighting casual gaming's growing dominance.

Downloads growth rankings reveal fresh momentum from both casual and RPG titles. Puzzle games led the surge—*Screw Sort 3D* jumped 58 places—while CyberAgent's *Chiikawa Pocket* and Sony's *Madoka Magica Magia Exedra* entered strongly. This underscores Japan's balanced demand between accessible puzzle formats and immersive role-playing experiences.

2025 Japan Top 10 Mobile Games by Downloads Unified • Jan 1, 2025 - July 31, 2025

| Downloads | | | |
|-----------|---|---|--------------------------------|
| | | | vs Previous |
| 1 |  | Pokémon TCG Pocket The Pokémon Company | Strategy Card Battler |
| 2 |  | SD Gundam G Generation ETERNAL BANDAI NAMCO Entertainment | Strategy Turn-Based Tactics |
| 3 |  | Block Blast! HungryStudio | Puzzle Block |
| 4 |  | Color Block Jam Take-Two Interactive | Puzzle Block |
| 5 |  | Car Jam Shycheese | Puzzle Sort |
| 6 |  | Chiikawa Pocket CyberAgent | RPG Idle RPG |
| 7 |  | Screw Sort 3D - Pin Puzzle Mindscaplay | Puzzle Physics |
| 8 |  | Whiteout Survival Century Games | Strategy 4X Strategy |
| 9 |  | Who's next to you? 隣の席はだ Tokyo Communications Group | Puzzle Riddle |
| 10 |  | Screwdom iKame | Puzzle Physics |

| Downloads Growth | | | |
|------------------|---|---|--------------------------------|
| | | | vs Previous |
| 1 |  | SD Gundam G Generation ETERNAL BANDAI NAMCO Entertainment | Strategy Turn-Based Tactics |
| 2 |  | Color Block Jam Take-Two Interactive | Puzzle Block |
| 3 |  | Chiikawa Pocket CyberAgent | RPG Idle RPG |
| 4 |  | Screw Sort 3D - Pin Puzzle Mindscaplay | Puzzle Physics |
| 5 |  | Who's next to you? 隣の席はだ Tokyo Communications Group | Puzzle Riddle |
| 6 |  | Screwdom iKame | Puzzle Physics |
| 7 |  | Madoka Magica Magia Exedra Sony Corporation | RPG Turn-based RPG |
| 8 |  | Car Jam Shycheese | Puzzle Sort |
| 9 |  | Block Blast! HungryStudio | Puzzle Block |
| 10 |  | Archer 2 HABBY | Action Shoot 'em Up |

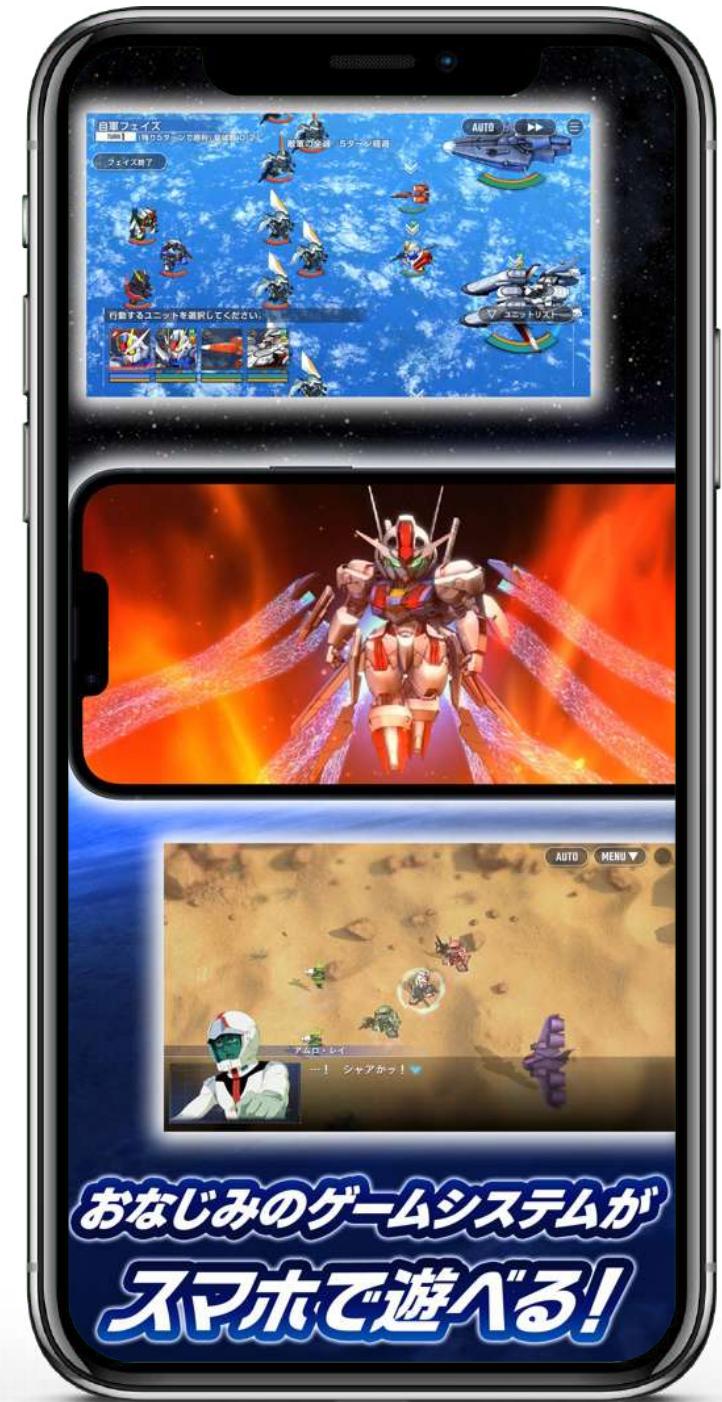
Data Source: Sensor Tower App Performance Insights as of September 1, 2025.

Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. Revenue is gross — inclusive of any percent taken by the app stores.



SD Gundam G Generation ETERNAL

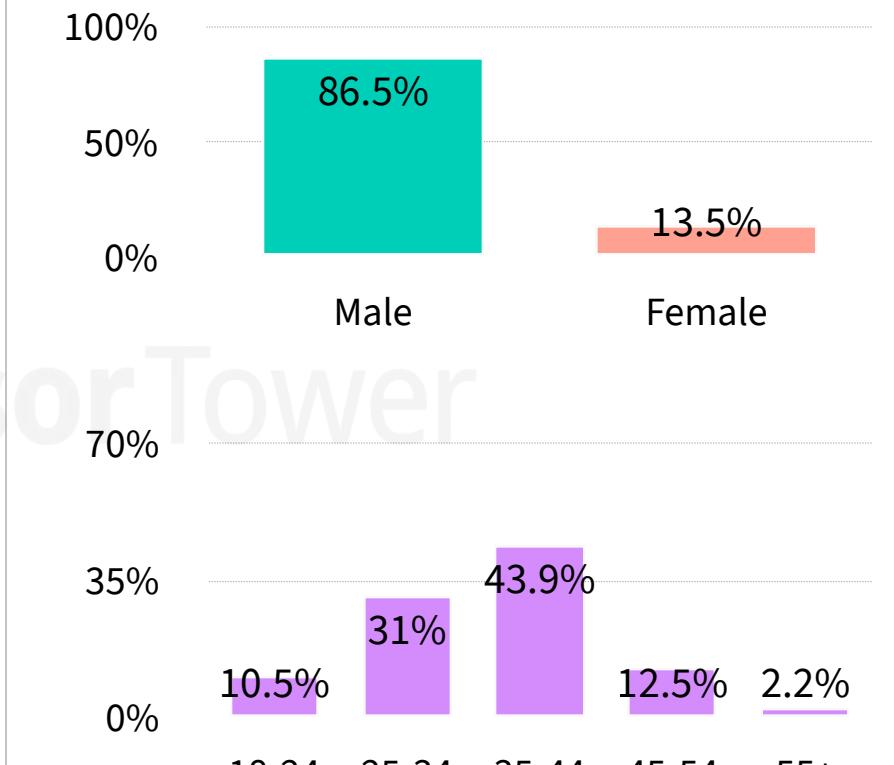
Bandai Namco Entertainment



Game Overview

| | |
|----------------------|---|
| Release Date | April 2025 |
| Genre | Strategy |
| Sub-Genre | Turn-Based Tactics |
| Product Model | Mid-Core |
| Setting | Sci-Fi |
| Theme | Mech |
| Art Style | 3D Anime |
| Camera POV | Top-Down |
| Monetization | Free to Play, Live Ops, Gacha, Currency Bundles, Starter Pack, Loot Box |
| Game Tags | ACG, Character Collection, Narrative Stories |

Gender & Age Japan, Q2 2025



Data Source: Sensor Tower App Performance and Audience Insights

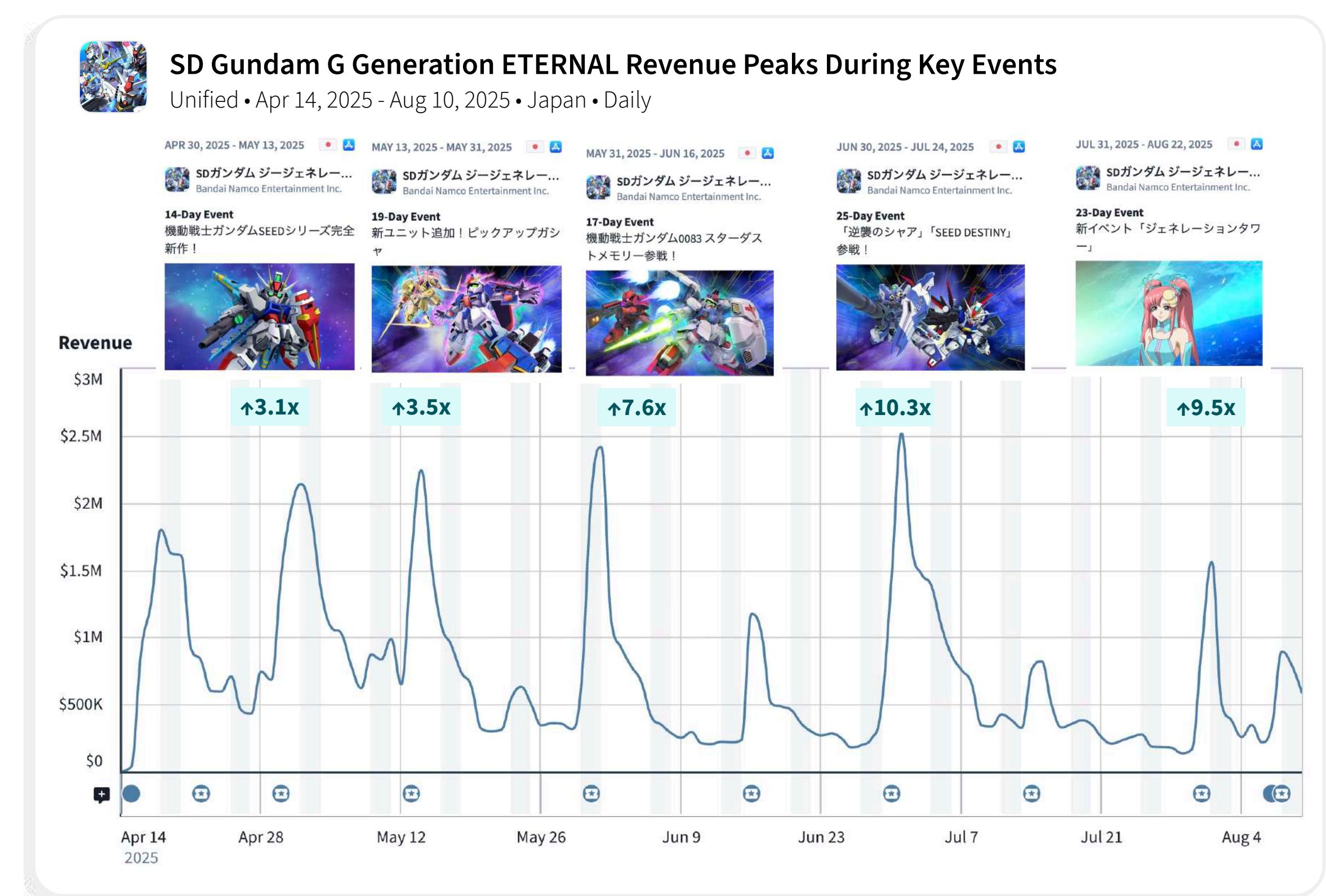
SD Gundam G Generation ETERNAL, launched in April 2025 by Bandai Namco, adapts the long-running Gundam franchise into a mobile turn-based tactics format. With its sci-fi mecha setting and 3D anime art, the game blends nostalgia with mid-core strategy, enriched by gacha-driven character collection and live ops events.

The game's audience skews overwhelmingly male (86.5%), with its core base in the 25–44 age range, especially 35–44 (43.9%). This aligns with Gundam's legacy fanbase, while its monetization through bundles, starter packs, and loot boxes sustains strong engagement. The mix of deep tactics and collectible mechs ensures enduring appeal among strategy and anime fans.

SD Gundam G Generation ETERNAL Revenue Peaks Driven by Limited-Time Events in Japan

Revenue surges for *SD Gundam G Generation ETERNAL* closely align with limited-time events and content drops, underscoring the power of nostalgia and collectible-driven engagement. The late-June SEED DESTINY event generated the strongest response, driving a 10.3x increase compared to baseline levels.

Recurring Gundam-themed campaigns sustain momentum by appealing to long-time fans while drawing in new players. Consistent event pacing, combined with gacha-driven mechanics, highlights how Bandai Namco leverages IP strength and strategic live ops to maximize engagement and revenue performance in Japan's competitive mid-core market.



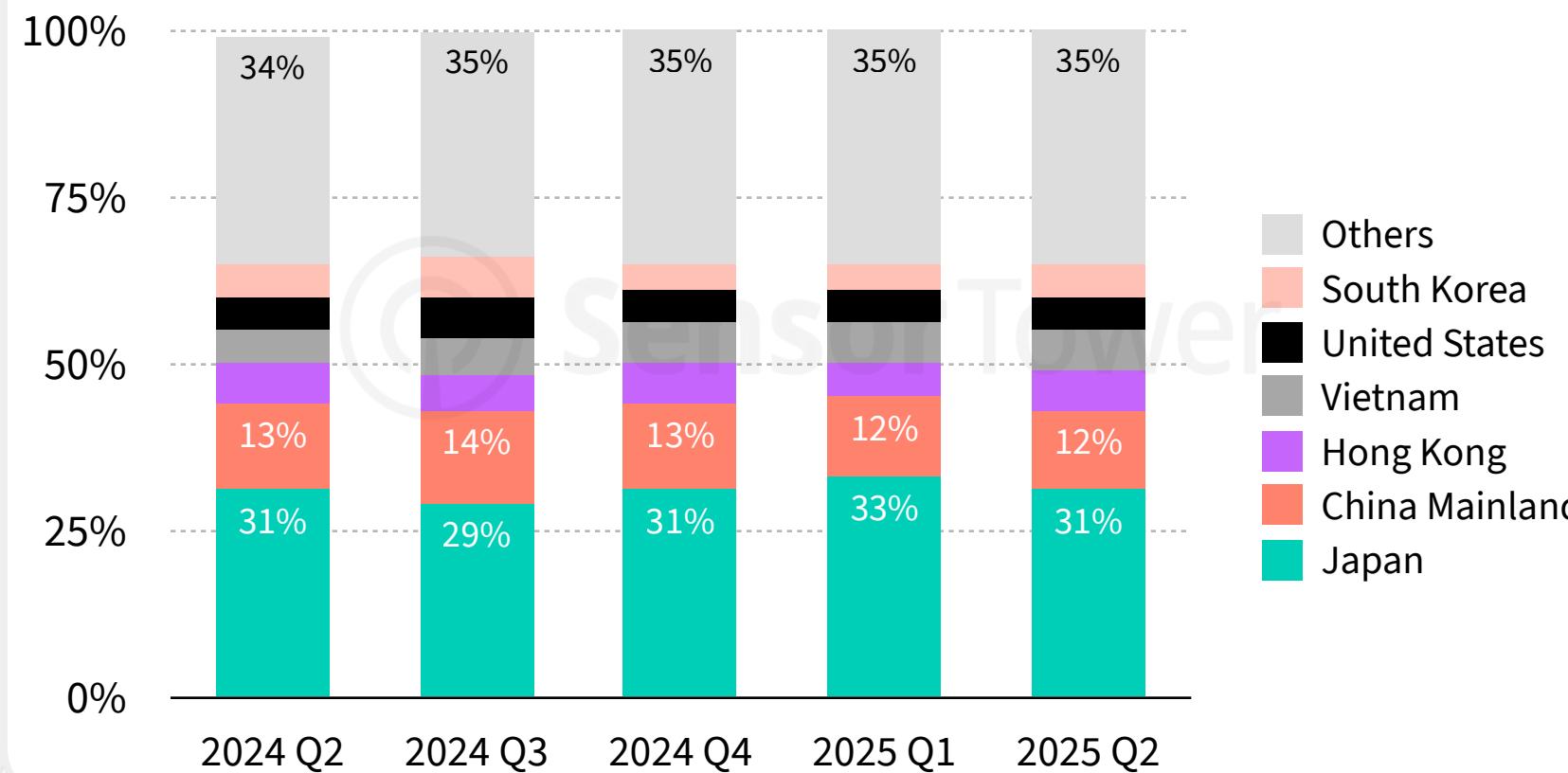
Japan HQ'd Publishers Maintains Download Leadership While Expanding Revenue Share

Data Source: Sensor Tower App Performance Insights as of September 1, 2025.

Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. Revenue is gross — inclusive of any percent taken by the app stores.

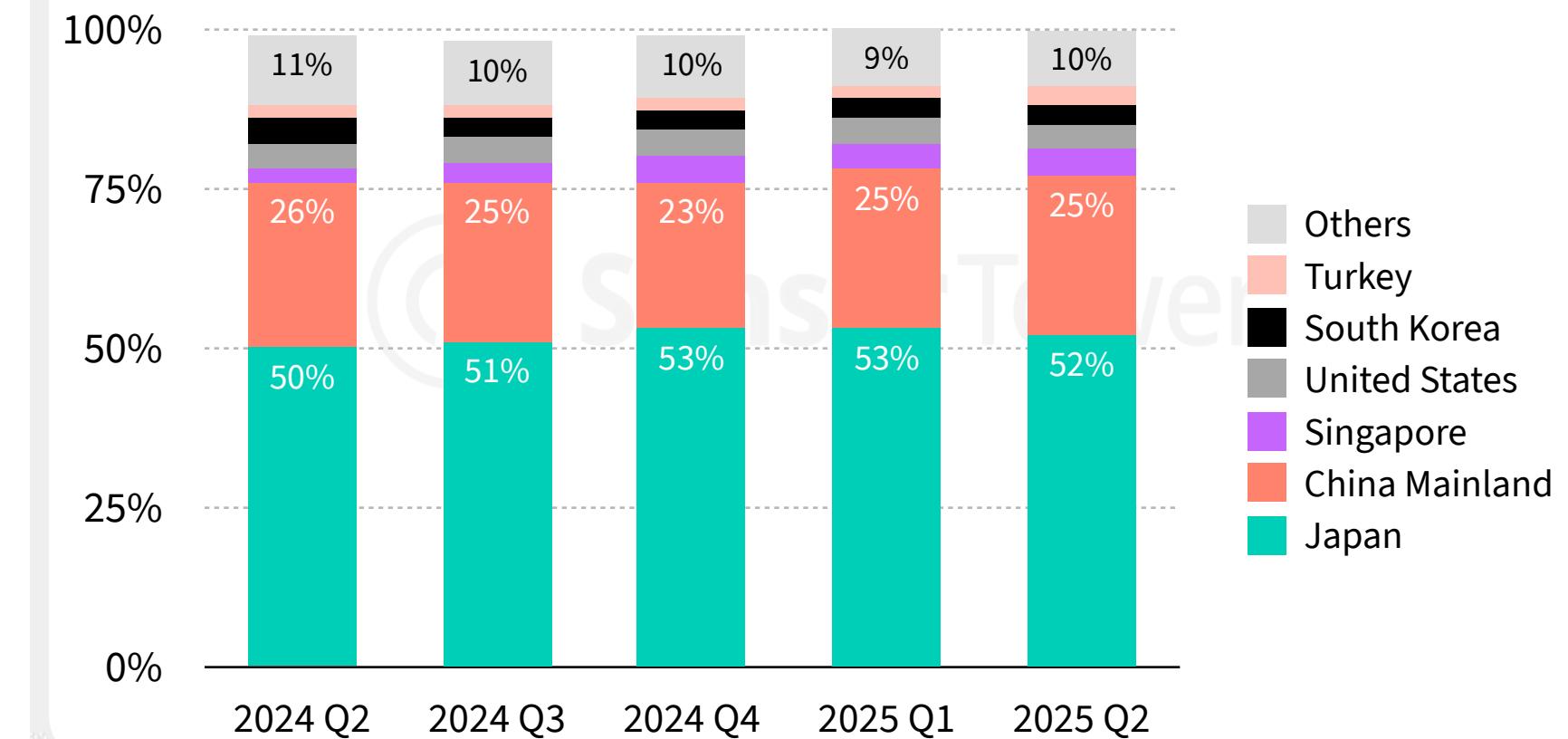
Japan Mobile Game Downloads Share By Publisher HQ

2024 Q2 to 2025 Q2



Japan Mobile Game IAP Revenue Share By Publisher HQ

2024 Q2 to 2025 Q2



Japan HQ Publishers continues to lead domestic mobile game downloads, consistently holding around one-third of market share despite rising global competition. This highlights the strength of homegrown publishers in sustaining engagement across both core and casual gaming genres.

On the revenue side, Japan's dominance has grown even stronger. Local publishers now capture more than half of total IAP revenue, reflecting successful monetization models and loyal high-spending audiences that reinforce Japan's global leadership in mobile game profitability.

Global Game Rankings in Japan 2025: Strategy Reigns in Revenue, Puzzles Rule Downloads

Data Source: Sensor Tower App Performance Insights as of September 1, 2025.

Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. Revenue is gross — inclusive of any percent taken by the app stores.

Top 10 Games by Global Publishers by Revenue in Japan

January to July 2025

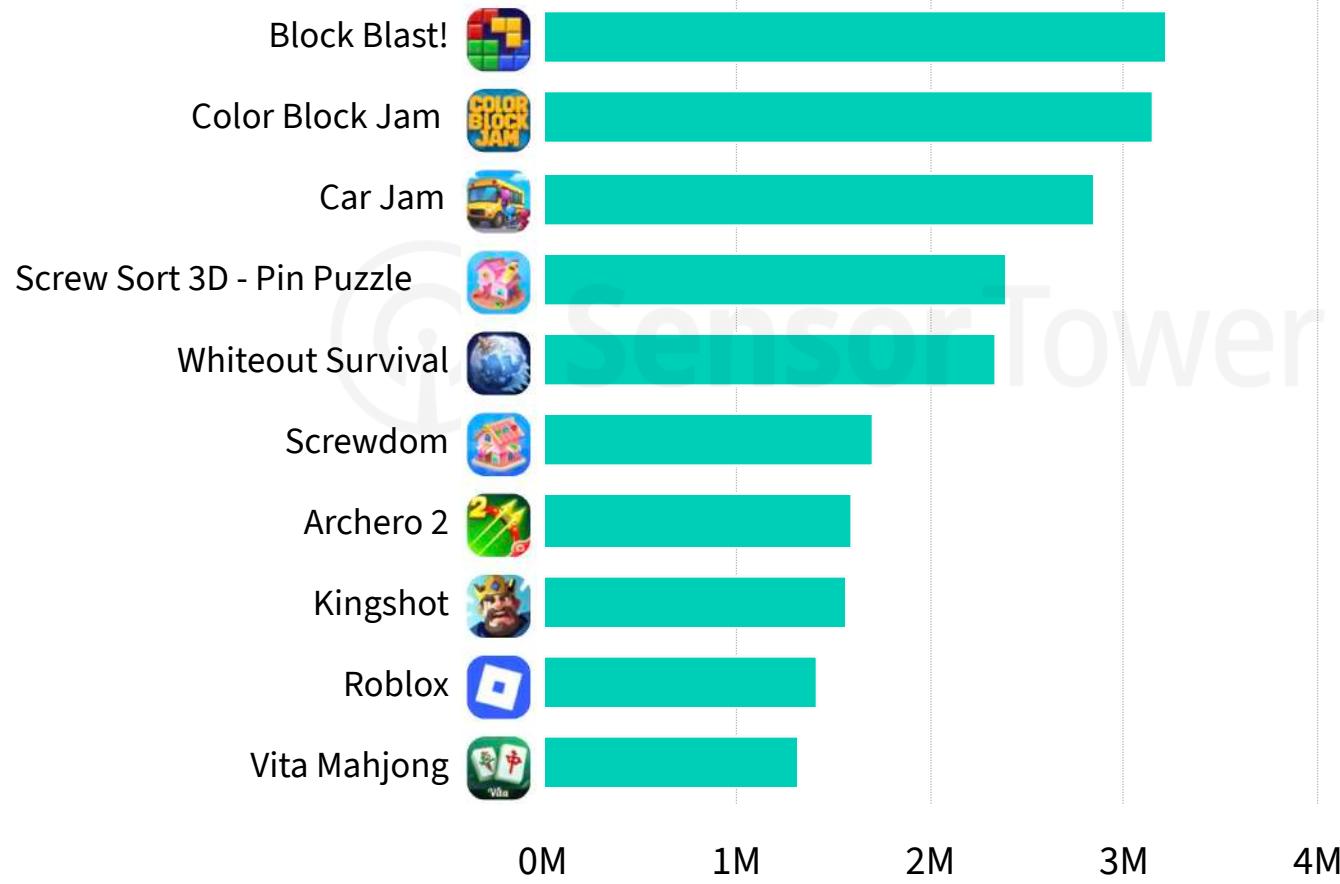


Game IQ Genre

- 4X Strategy
- Turn-based RPG
- 4X Strategy
- Geolocation
- FPS / 3PS
- Match Swap
- Open World Adventure
- Squad RPG
- Hack and Slash
- Squad RPG

Top 10 Games by Global Publishers by Downloads in Japan

January to July 2025



Game IQ Genre

- Block
- Block
- Sort
- Physics
- 4X Strategy
- Physics
- Shoot 'em Up
- 4X Strategy
- Sandbox
- Match Pair

In Japan, non-domestic publishers are increasingly competitive, with 4X strategy titles like *Last War: Survival* and *Whiteout Survival* topping revenue charts. RPG hits such as *Honkai: Star Rail* and *Genshin Impact* also maintained strong positions, showing that international studios can capture loyal, high-spending audiences.

On downloads, casual puzzle games from overseas publishers—*Block Blast!*, *Color Block Jam*, and *Car Jam*—dominate rankings, proving that accessible, universal gameplay can break into Japan's traditionally IP-driven market. Success for non-domestic titles lies in combining mass-appeal mechanics with consistent live ops to engage both casual and core Japanese gamers.

Last War: Survival Boosts Revenue Through Aggressive Live Ops

Last War: Survival sustained strong revenue momentum by layering frequent offers, temporary deals, and themed events. Strategic use of daily must-buy offers and alliance-driven activities helped stabilize engagement while driving consistent spending throughout June.

Revenue notably spiked in early July 2025 following major live ops campaigns, including the Double Joy event and new seasonal packs. This highlights how adaptive event-driven monetization and coordinated content drops can effectively elevate revenue, proving the game's live ops model is resonating in Japan.

Data Source: Playliner Live ops Insights, Sensor Tower App Performance Insights as of September 1, 2025.

Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. Revenue is gross — inclusive of any percent taken by the app stores. Only a small portion of the game's live ops is represented here. For a full look, go to the Playliner platform.

Playliner Live Ops Insights

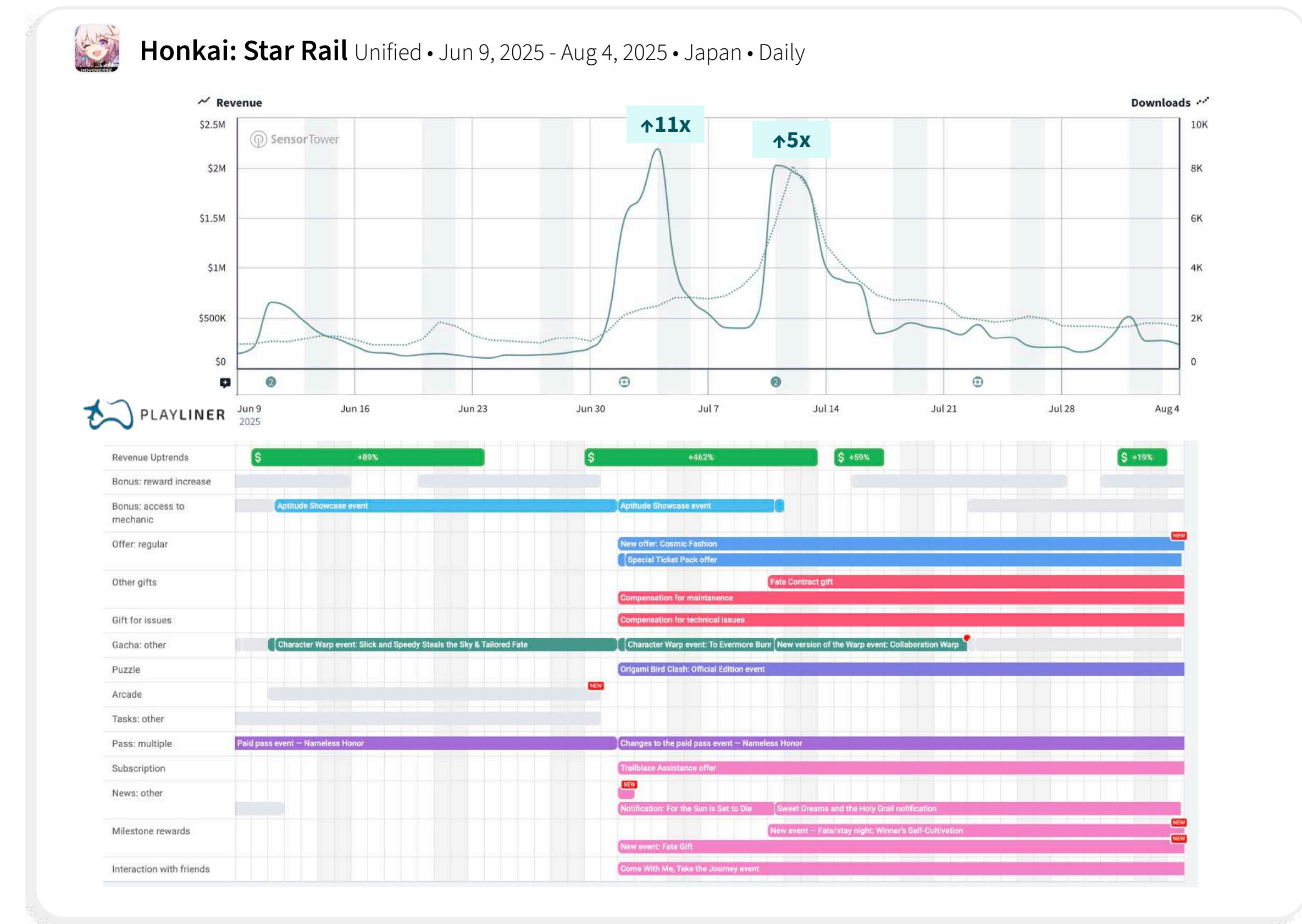


Honkai: Star Rail Sees July Spike with Event-Driven Strategy

In early July, *Honkai: Star Rail* achieved sharp revenue peaks through Character Warp banners, cosmetic offers, and refreshed passes. These high-impact events successfully drove player engagement and monetization within a short window.

miHoYo's tailored live ops approach shows how overseas publishers adapt effectively to Japan. By timing limited banners and premium offers strategically, the game maintains strong momentum, reinforcing its position as a leading RPG in Japan's mobile market.

Playliner Live Ops Insights



Data Source: Playliner live ops Insights, Sensor Tower App Performance Insights as of September 1, 2025.

Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. Revenue is gross — inclusive of any percent taken by the app stores. Only a small portion of the game's live ops is represented here. For a full look, go to the Playliner platform.



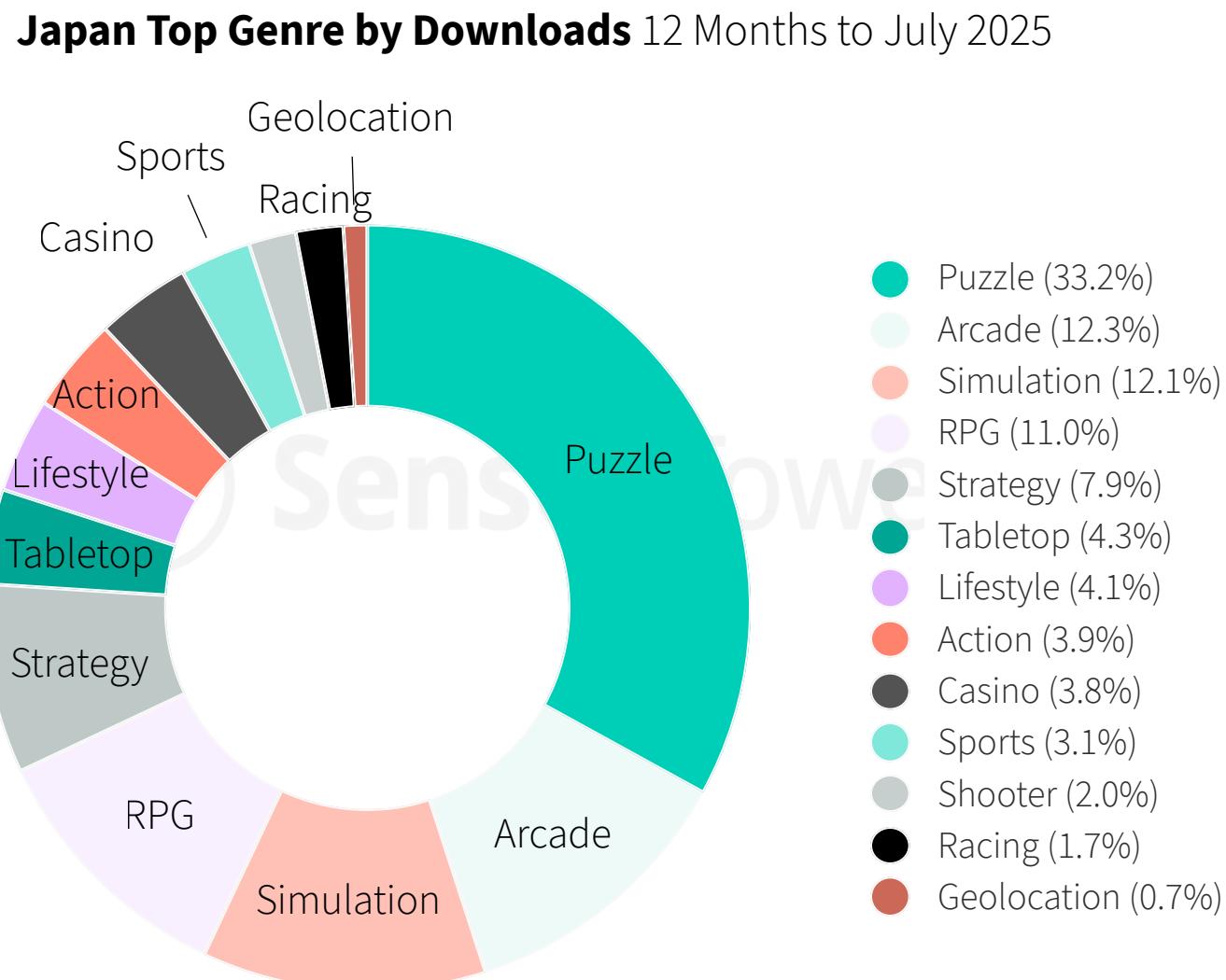
Japan Country Deep-Dive

Top Genres and Games

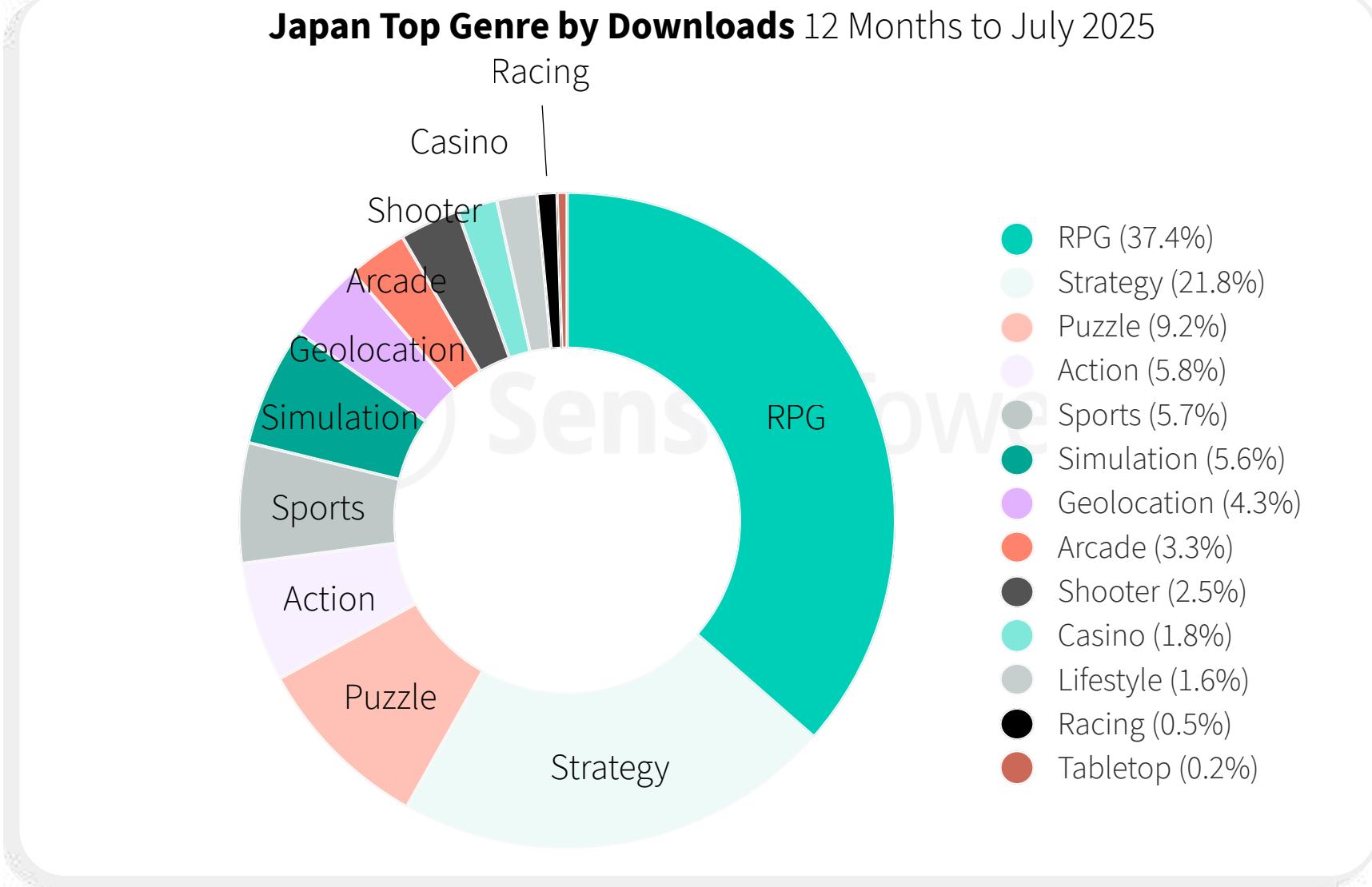
Japan's Mobile Game Market: Puzzle Dominates Downloads, RPGs Lead Revenue

Data Source: Sensor Tower App Performance Insights as of September 1, 2025.

Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. Revenue is gross — inclusive of any percent taken by the app stores.



Puzzle games account for one-third of downloads, reflecting mass appeal and accessibility, while Arcade and Simulation follow. Casual genres continue to drive broad adoption, securing high visibility across Japan's mobile app ecosystem despite lower long-term monetization potential.

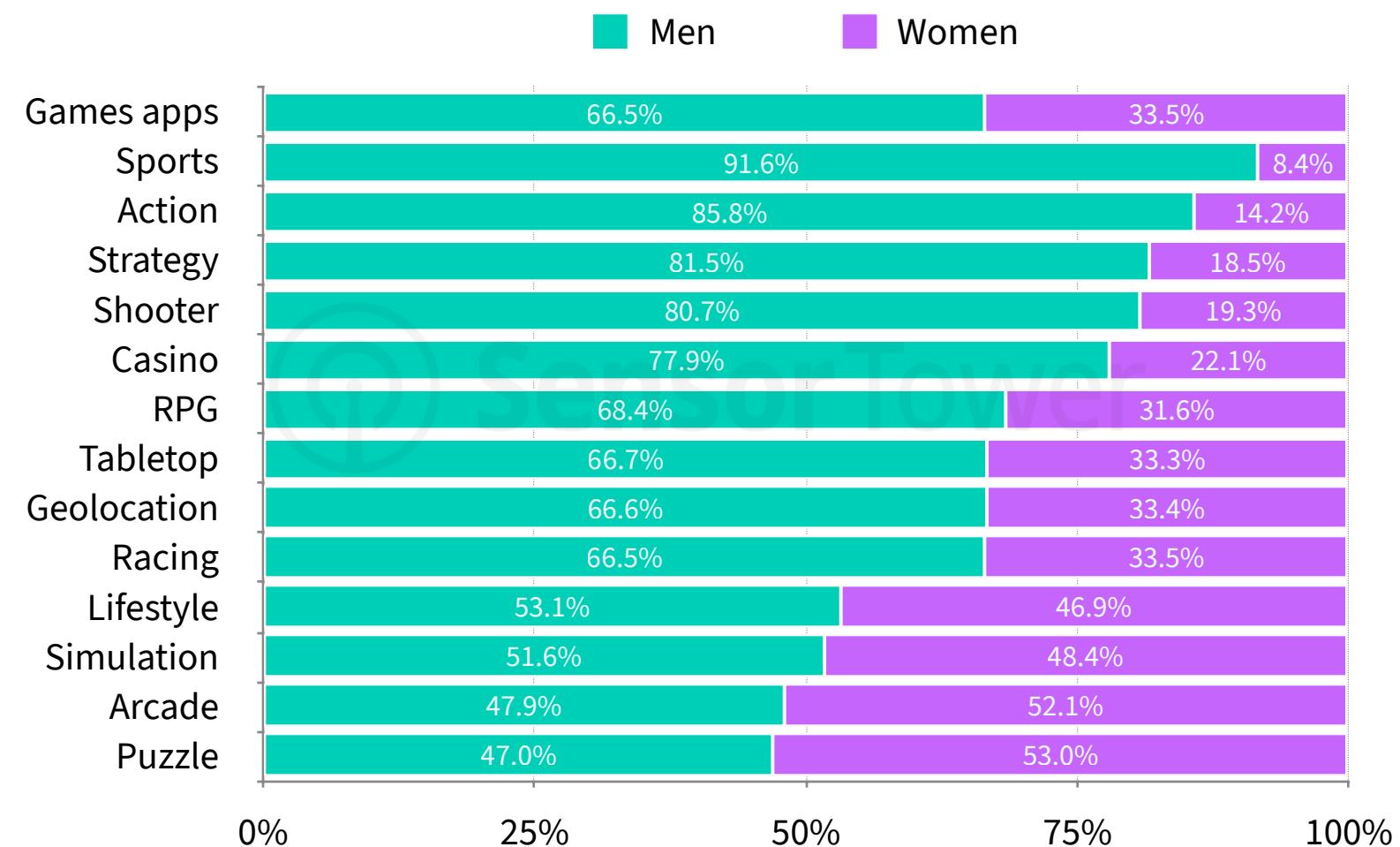


Revenue trends tell a different story—RPGs dominate with over one-third share, supported by Strategy titles at nearly 22%. Deep narrative content, gacha mechanics, and event-driven monetization ensure RPGs remain Japan's most profitable genre, balancing casual adoption with high-value core player spending.

Japan Mobile Gamer Demographics: Male Core Dominance, Older Players Expand Casual Niches

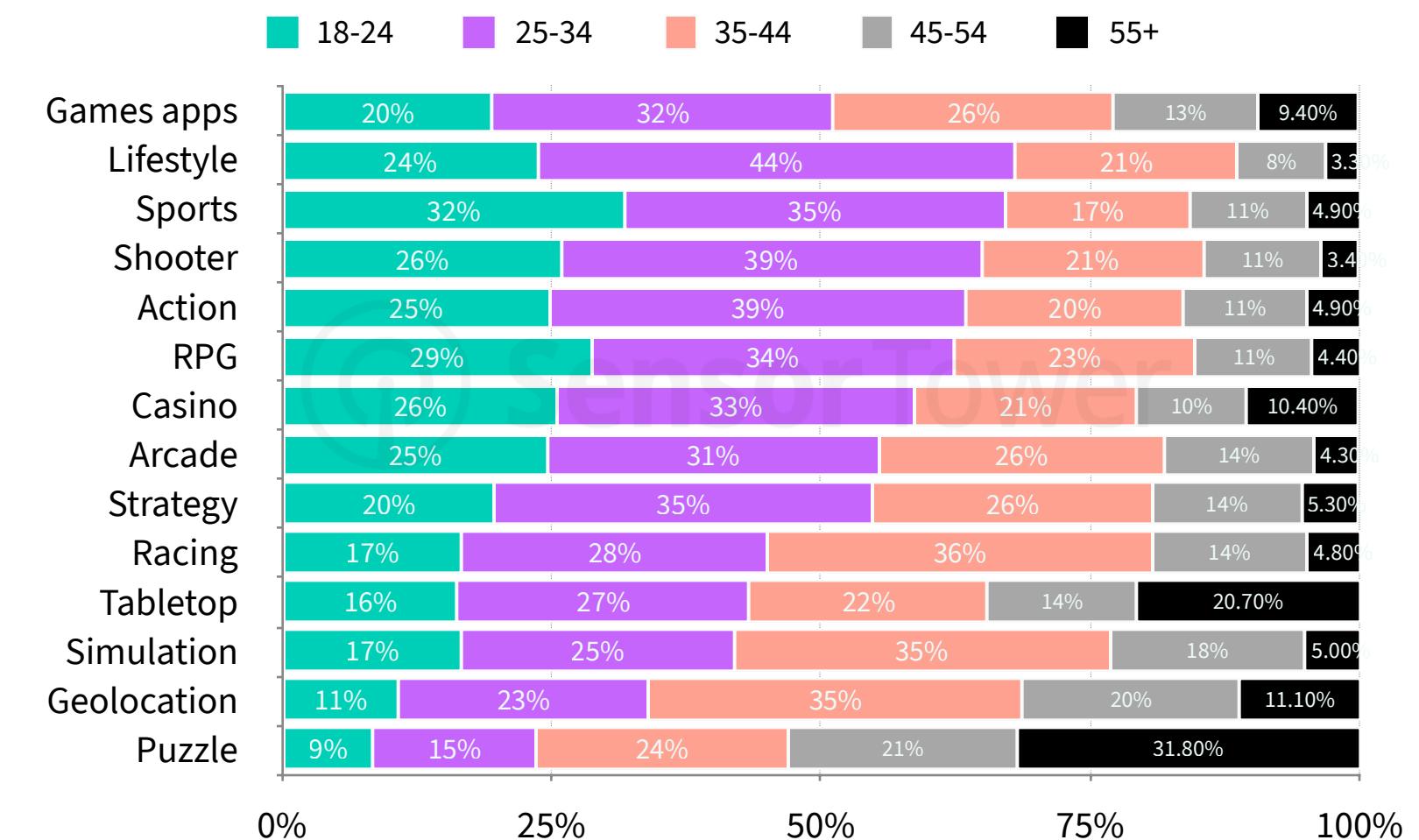
Data Source: Sensor Tower Audience Insights. Games classified by Sensor Tower's Game Taxonomy as of September 1, 2025.

Gaming app gender group percentage Japan H1 2025



Male players dominate competitive genres—Sports, Action, and Strategy—with shares above 80%. In contrast, women lead in Puzzle, Arcade, and Simulation, where casual and accessible formats attract broader gender balance across Japan's gaming ecosystem.

Gaming app age group percentage Japan H1 2025



Age trends reveal younger players drive competitive titles, with 18–34 accounting for most Sports and Shooters. Meanwhile, older players strengthen niches: Puzzle has 32% aged 55+, and Tabletop over 20%, underscoring how casual, slower-paced formats appeal to Japan's aging population.

Japan Subgenre Trends: Casual Puzzles Grow, RPGs Sustain Revenue Power

Data Source: Sensor Tower App Performance Insights as of September 1, 2025.

Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. Revenue is gross — inclusive of any percent taken by the app stores.

Japan Top Subgenre by Downloads 12 Months to June 2025



Downloads in Japan are shifting toward casual genres, with Sort and Physics subgenres growing over 70% year-on-year. Games like *Car Jam* and *Screw Sort 3D* highlight rising demand for simple, accessible puzzle gameplay.

Japan Top Subgenre by IAP Revenue 12 Months to June 2025



Revenue remains anchored in core RPG and Strategy genres, led by *Uماموسومي: Pretty Derby* and *Last War: Survival*. While some RPG subgenres face declines, explosive growth from *Pokémon TCG Pocket* shows card battlers and strategic monetization models can still capture strong spending momentum.

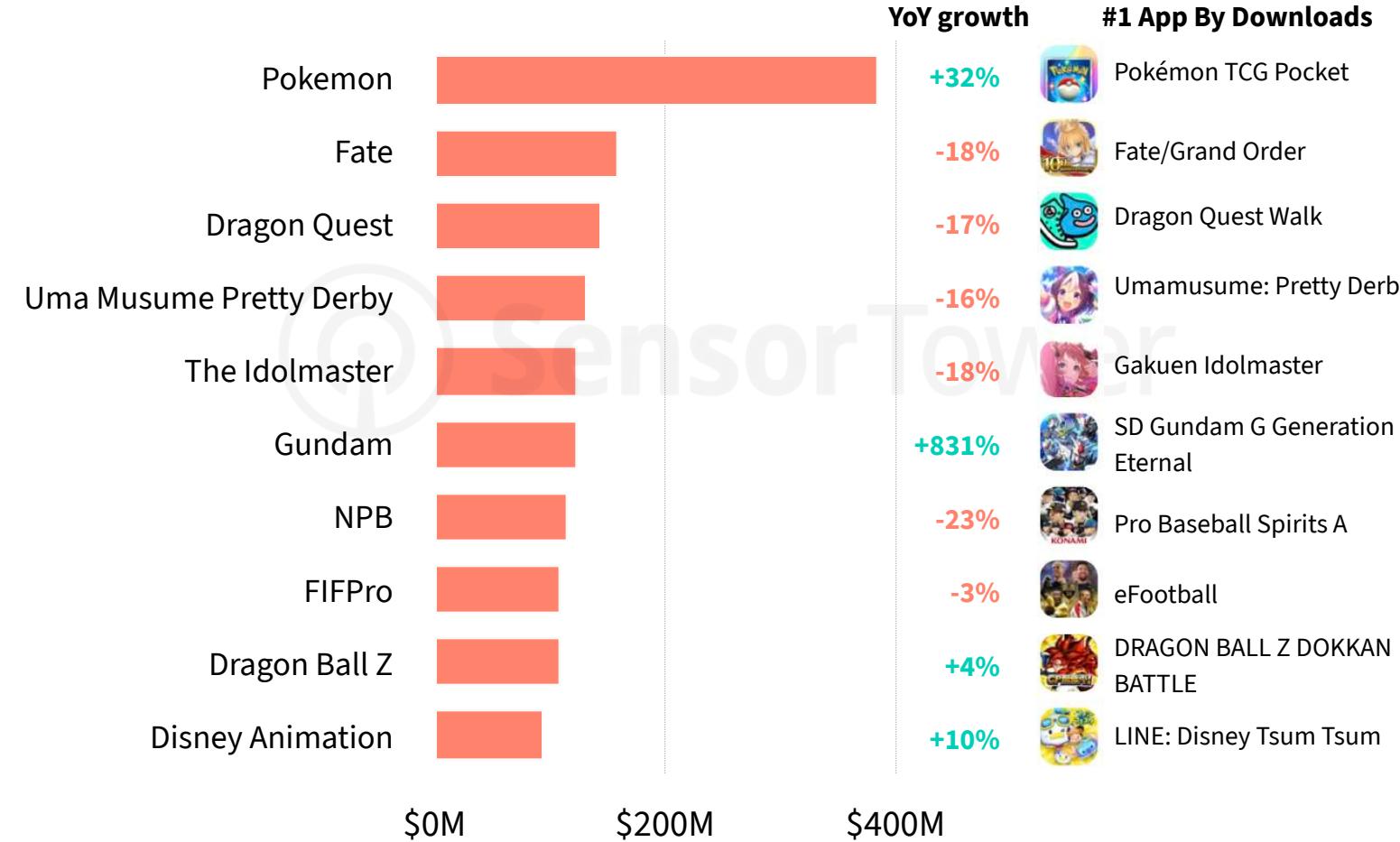
Japan's IP-Based Mobile Games: Pokémon Leads, Gundam Emerges as Growth Driver

Data Source: Sensor Tower App Performance Insights as of September 1, 2025.

Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. Revenue is gross — inclusive of any percent taken by the app stores.

In-app purchase revenue of IP-based mobile games in Japan - by IP

12 Months to July 2025



Japan IP Based Games by Revenue Unified • Jan 1, 2025 - July 31, 2025

Revenue

| | | | |
|----|--|--------------------------------|---------------------|
| 1 | | Pokémon TCG Pocket | The Pokémon Company |
| 2 | | Fate/Grand Order | Sony |
| 3 | | Umamusume: Pretty Derby | CyberAgent |
| 4 | | SD Gundam G Generation Eternal | BANDAI NAMCO |
| 5 | | eFootball | Konami |
| 6 | | Pro Baseball Spirits A | Konami |
| 7 | | Gakuen Idolmaster | BANDAI NAMCO |
| 8 | | Dragon Quest Walk | SQUARE ENIX |
| 9 | | DRAGON BALL Z DOKKAN BATTLE | BANDAI NAMCO |
| 10 | | Pokémon GO | Scopely |

Revenue Growth

| | | | |
|----|--|--------------------------------|---------------------|
| 1 | | SD Gundam G Generation Eternal | BANDAI NAMCO |
| 2 | | Pokémon TCG Pocket | The Pokémon Company |
| 3 | | Madoka Magica Magia Exedra | Sony |
| 4 | | DRAGON BALL Z DOKKAN BATTLE | BANDAI NAMCO |
| 5 | | Persona: The Phantom X | SEGA |
| 6 | | Ragnarok X | GungHo Online |
| 7 | | Chiikawa Pocket | Applibo |
| 8 | | Disney Solitaire | Playtika LTD |
| 9 | | Pro Baseball Rising | Com2uS |
| 10 | | LINE: Disney Tsum Tsum | NAVER |

Pokémon remains Japan's top IP by IAP revenue, boosted by *Pokémon TCG Pocket*'s strong adoption. Legacy franchises like *Fate/Grand Order*, *Dragon Quest*, and *Umamusume* maintain solid contributions, reflecting maturity in long-established IP-driven titles.

Growth momentum is shifting toward newer or revitalized IPs. *SD Gundam G Generation Eternal* surged with over 800% growth, while *Madoka Magica Magia Exedra* and *Persona: Nightfall Phantom* show strong debuts. This highlights Japan's ability to sustain evergreen IPs while fueling new franchise opportunities.

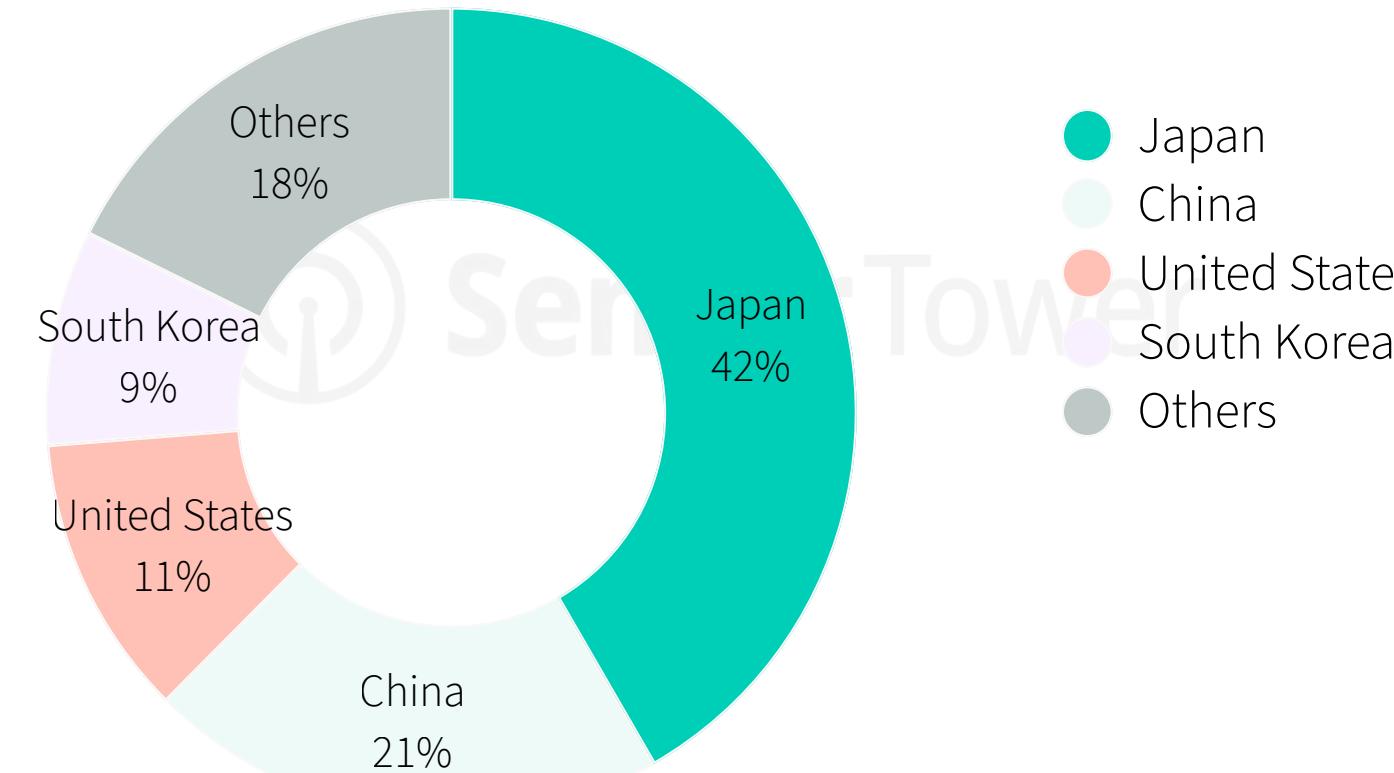
Japan Dominates Global Anime-Style Games, Fueled by Strong IP Revenue

Data Source: Sensor Tower App Performance Insights as of September 1, 2025.

Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. Revenue is gross — inclusive of any percent taken by the app stores.

Market share of IAP revenue for Global anime-style mobile games

Jan to July 2025



Japan Anime Based Games by Revenue Unified • Jan 1, 2025 - July 31, 2025

Revenue

| | | | |
|----|--|--------------------------------|---------------|
| 1 | | Monster Strike | Mixi |
| 2 | | Fate/Grand Order | Sony |
| 3 | | Honkai: Star Rail | miHoYo |
| 4 | | Uماموسومه: Pretty Derby | CyberAgent |
| 5 | | SD Gundam G Generation Eternal | BANDAI NAMCO |
| 6 | | Gakuen Idolmaster | BANDAI NAMCO |
| 7 | | Dragon Quest Walk | SQUARE ENIX |
| 8 | | Puzzle & Dragons | GungHo Online |
| 9 | | DRAGON BALL Z DOKKAN BATTLE | BANDAI NAMCO |
| 10 | | Genshin Impact | miHoYo |

Revenue Growth

| | | | |
|----|--|--------------------------------|---------------|
| 1 | | SD Gundam G Generation Eternal | BANDAI NAMCO |
| 2 | | Shadowverse: Worlds Beyond | CyberAgent |
| 3 | | Madoka Magica Magia Exedra | Sony |
| 4 | | Wuthering Waves | Kuro |
| 5 | | Honkai: Star Rail | miHoYo |
| 6 | | DRAGON BALL Z DOKKAN BATTLE | BANDAI NAMCO |
| 7 | | Wizardry Variants Daphne | Drecom |
| 8 | | Tree of Savior: Neverland | Alibaba |
| 9 | | Persona: Nightfall Phantom | SEGA |
| 10 | | Ragnarok X | GungHo Online |

Japan leads global anime-style mobile gaming, capturing 42% of IAP revenue, far ahead of China's 21%. Legacy IPs like *Monster Strike*, *Fate/Grand Order*, and *Uماموسومه: Pretty Derby* remain anchors, while overseas hits like *Honkai: Star Rail* reinforce cross-market appeal.

Growth momentum comes from revitalized and new IPs. *SD Gundam G Generation Eternal* tops revenue growth, joined by *Shadowverse: Worlds Beyond* and *Madoka Magica Magia Exedra*. This mix of enduring franchises and fresh adaptations highlights anime IP's sustained cultural and commercial power in Japan's mobile market.

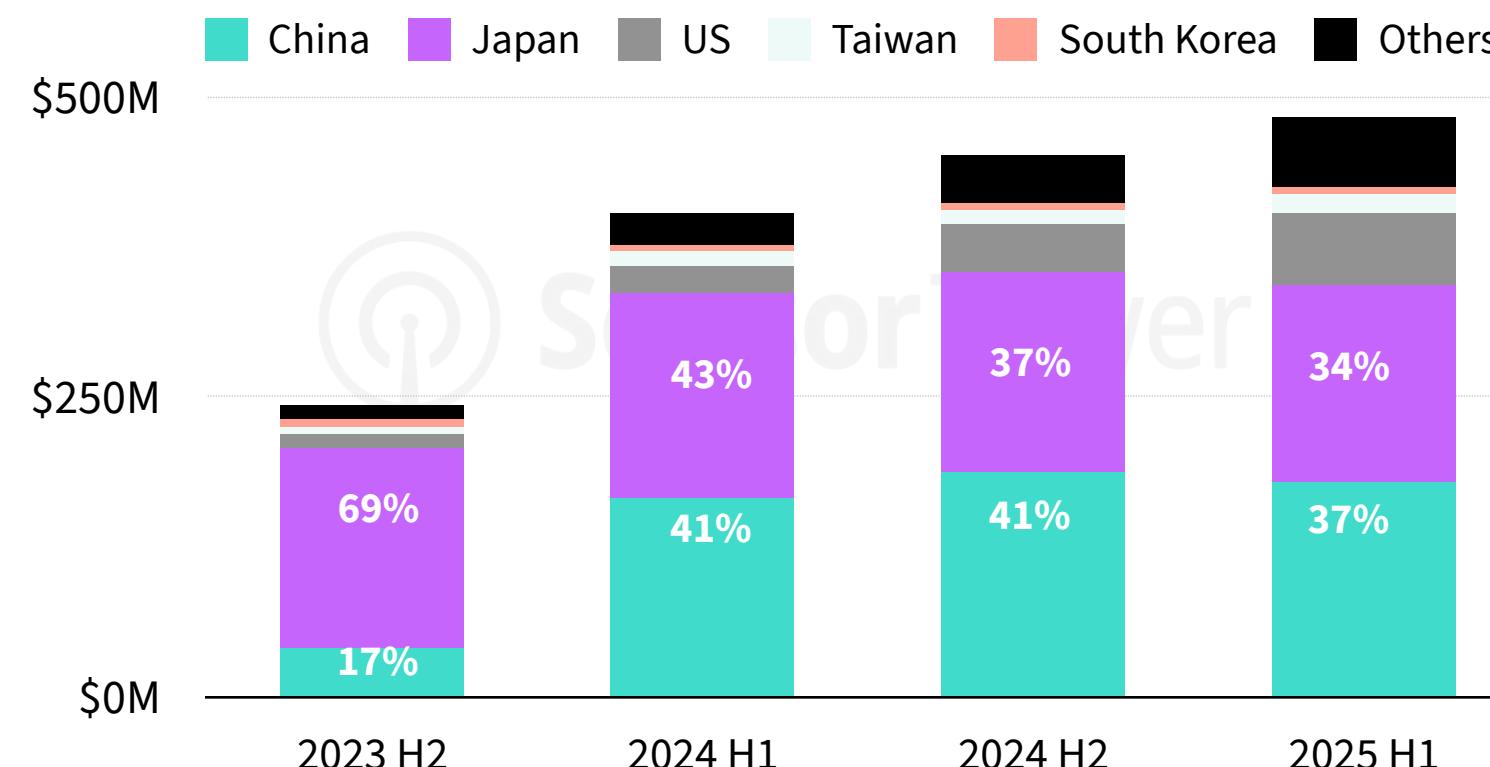
Otome Games: Japan's Enduring Strength in Narrative-Driven Romance Titles, Now Expanding Into Major Global Markets

Data Source: Sensor Tower App Performance Insights as of September 1, 2025.

Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. Revenue is gross — inclusive of any percent taken by the app stores.

'Otome' is categorized as a theme within Sensor Tower's Game IQ taxonomy, referring to story-driven romance games primarily targeted at women, often featuring relationship-building with multiple male characters.

2024 H1- 2025 H1 Revenue Market Share for Otome Games



Japan accounts for 34% of otome game revenue in 2025 H1, ranking second globally. Blockbusters like *Ensemble Stars!! Music*, *Love and DeepSpace* and *Disney: Twisted Wonderland* continue to anchor its strong domestic performance.

Japan Top Otome Games Unified • Jan 1, 2025 - July 31, 2025

| Downloads | | |
|-----------|--|---|
| 1 | | Ensemble Stars!! Music Happy Elements |
| 2 | | Love and DeepSpace Paper Games |
| 3 | | Devil Butler and the Black Cat Kousuke Wakayama |
| 4 | | Disney: Twisted Wonderland Sony |
| 5 | | Ikemen Vilains CYBIRD |
| 6 | | Break My Case coly |
| 7 | | 18TRIP Liberent |
| 8 | | Ikemen Prince CYBIRD |
| 9 | | Promise of Wizard coly |
| 10 | | Ensemble Stars!! Basic Happy Elements |

| Revenue | | |
|---------|--|---|
| 1 | | Ensemble Stars!! Music Happy Elements |
| 2 | | Disney: Twisted Wonderland Sony |
| 3 | | Love and DeepSpace Paper Games |
| 4 | | IDOLiSH7 BANDAI NAMCO |
| 5 | | 18TRIP Liberent |
| 6 | | Uta no Prince-sama BROCCOLI |
| 7 | | A3! Liberent |
| 8 | | Promise of Wizard coly |
| 9 | | Devil Butler and the Black Cat Kousuke Wakayama |
| 10 | | Break My Case coly |

Rising hits such as *Devil Butler and the Black Cat* and *18TRIP* signal fresh momentum, while long-running franchises like *IDOLiSH7* and *Uta no Prince-sama* ensure stability, showcasing Japan's balance of innovation and enduring fan engagement.



Japan Game Publishers On the Global Stage

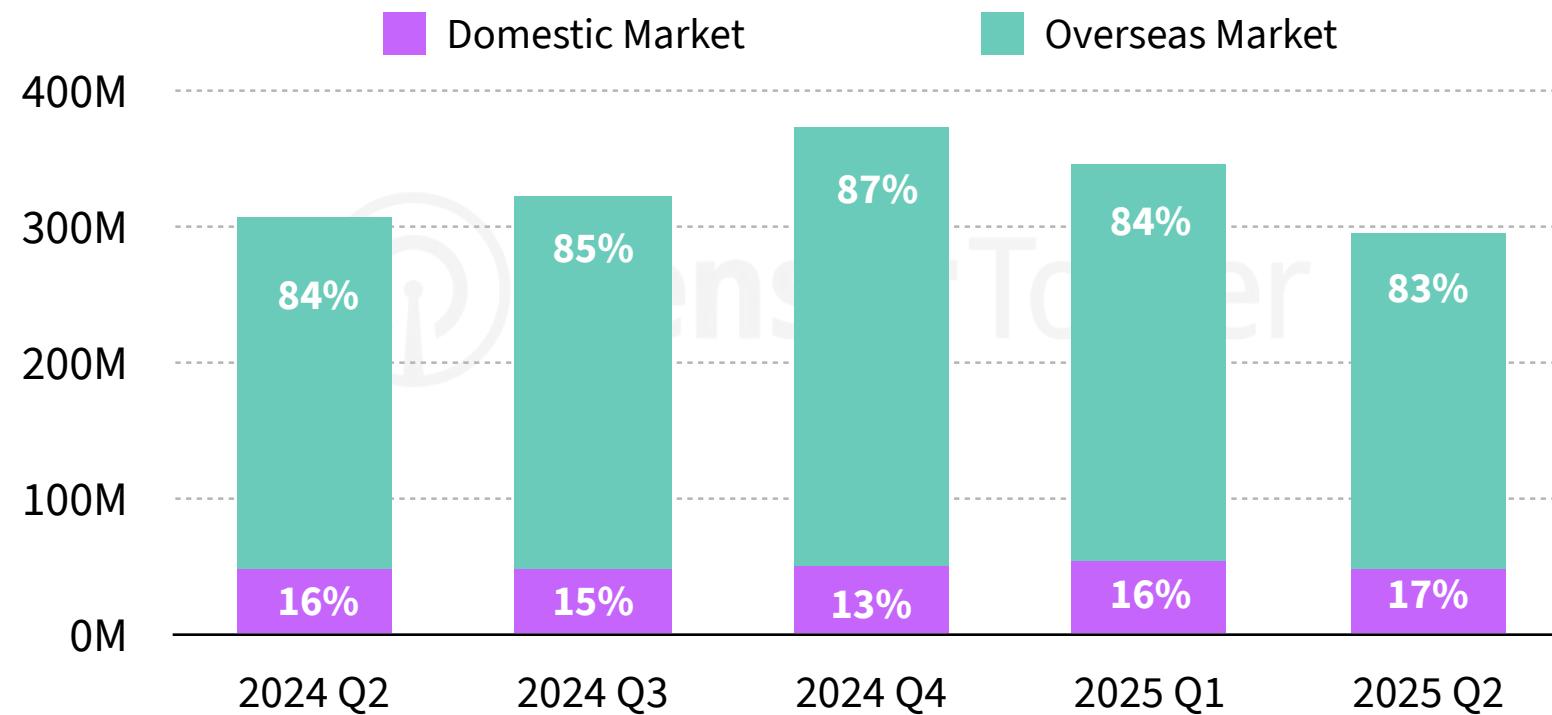
Japan-Based Publishers Maintain Domestic Strength While Tapping Overseas Revenue Growth

Data Source: Sensor Tower App Performance Insights as of September 1, 2025.

Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. Revenue is gross — inclusive of any percent taken by the app stores.

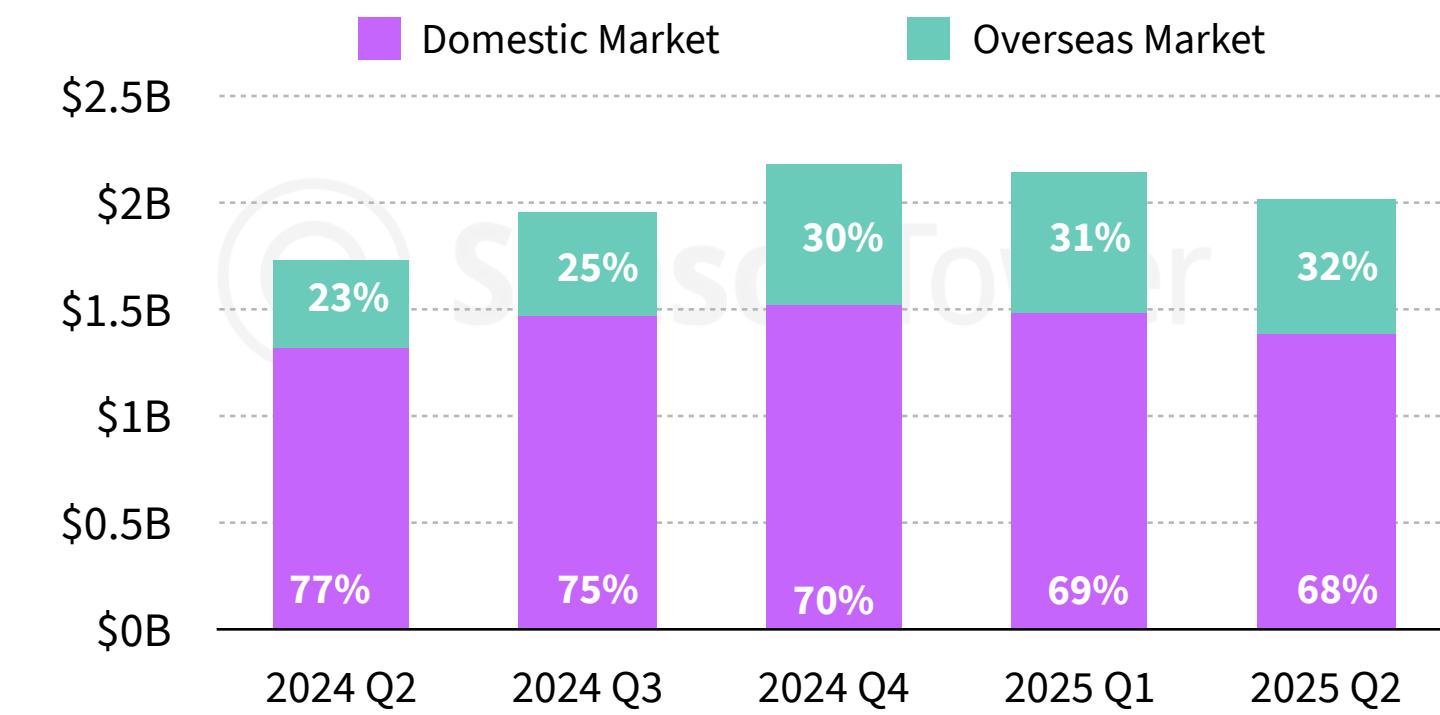
Japan HQ'd Publishers Share of Downloads by Market

2024 Q2 to 2025 Q2



Japan HQ'd Publishers Share of IAP Revenue by Market

2024 Q2 to 2025 Q2



Japanese mobile game developers exert strong global influence, with the majority of downloads coming from overseas markets. This underscores Japan's role as a major content exporter, as their titles attract international audiences across diverse genres.

Despite this global scale, revenue remains heavily domestic-driven. Over two-thirds of IAP earnings still originate in Japan, where high-value local players fuel consistent monetization. This dual dynamic highlights Japan's export strength in downloads but continued reliance on domestic spending power for revenue leadership.

Japan's Leading Publishers: Bandai Namco Tops Revenue, Kayac Leads Downloads

Kayac and Sega drive global downloads with casual hits like Number Master: Run and merge and Sonic Dash, while Pokémon remains a strong contender. Smaller publishers like Geisha Tokyo and Tokyo Communications also highlight the breadth of Japan's export-driven mobile gaming ecosystem.

Revenue leadership is anchored by Bandai Namco, The Pokémon Company, and Konami, fueled by iconic IPs including Dragon Ball Z Dokkan Battle, Pokémon TCG Pocket, and eFootball. Solid performers like Umamusume and Dragon Quest Walk underscore Japan's dominance in sustaining high-spending, loyal player bases.

Data Source: Sensor Tower App Performance Insights as of September 1, 2025.

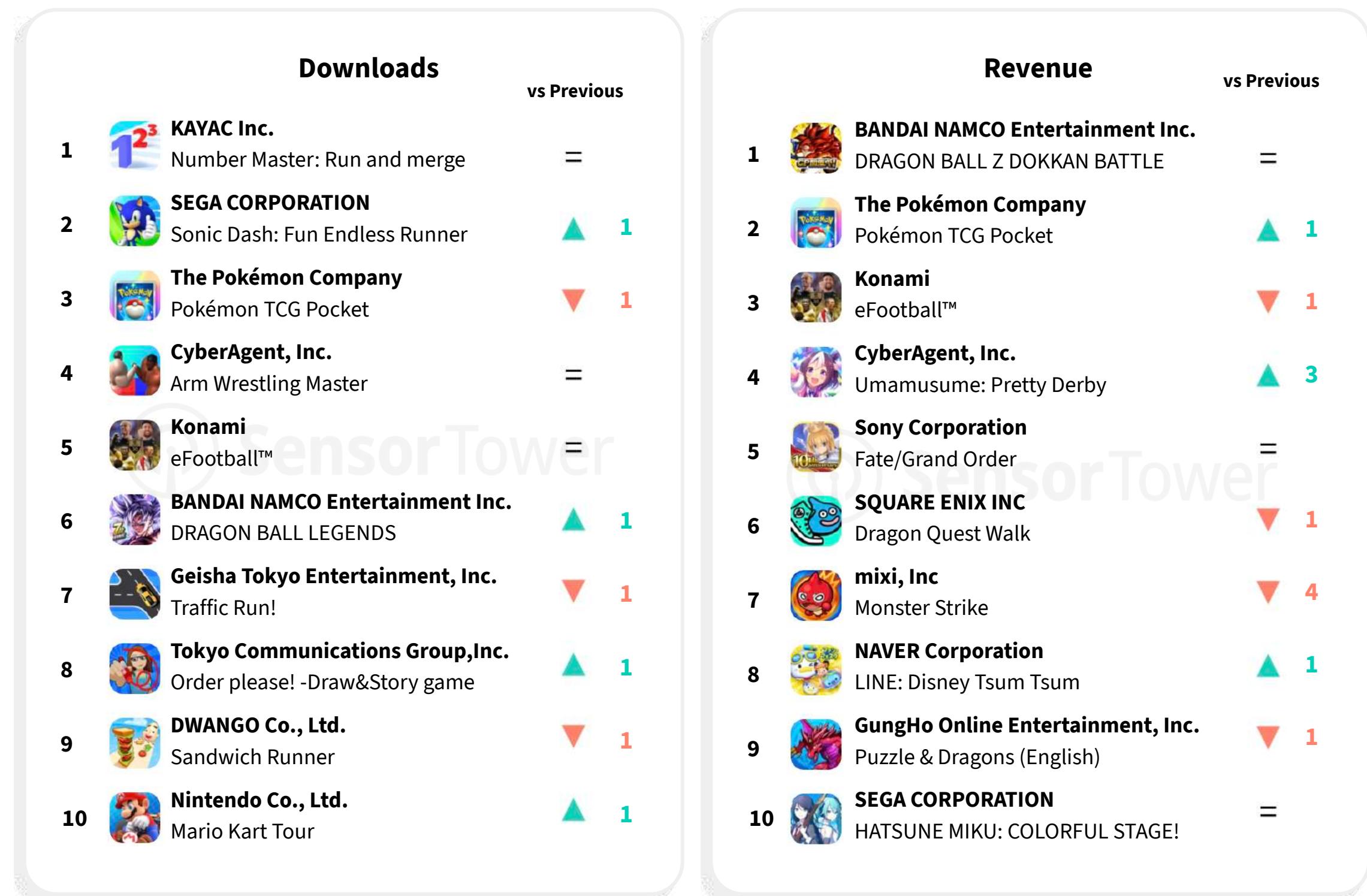
Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores.

Revenue is gross — inclusive of any percent taken by the app stores.

Analysis Includes Japan-founded publishers; excludes overseas firms listing Japan as HQ.

Top 10 Japan HQ'd Game Publishers & Top Game

Worldwide • Jan 1, 2025 - Jul 31, 2025



Japanese Games Abroad: Pokémon and eFootball Lead Revenue, Casual Titles Drive Downloads

Data Source: Sensor Tower App Performance Insights as of June 10, 2025.

Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. Revenue is gross — inclusive of any percent taken by the app stores. Analysis includes Japan-founded publishers; excludes overseas firms listing Japan as HQ.

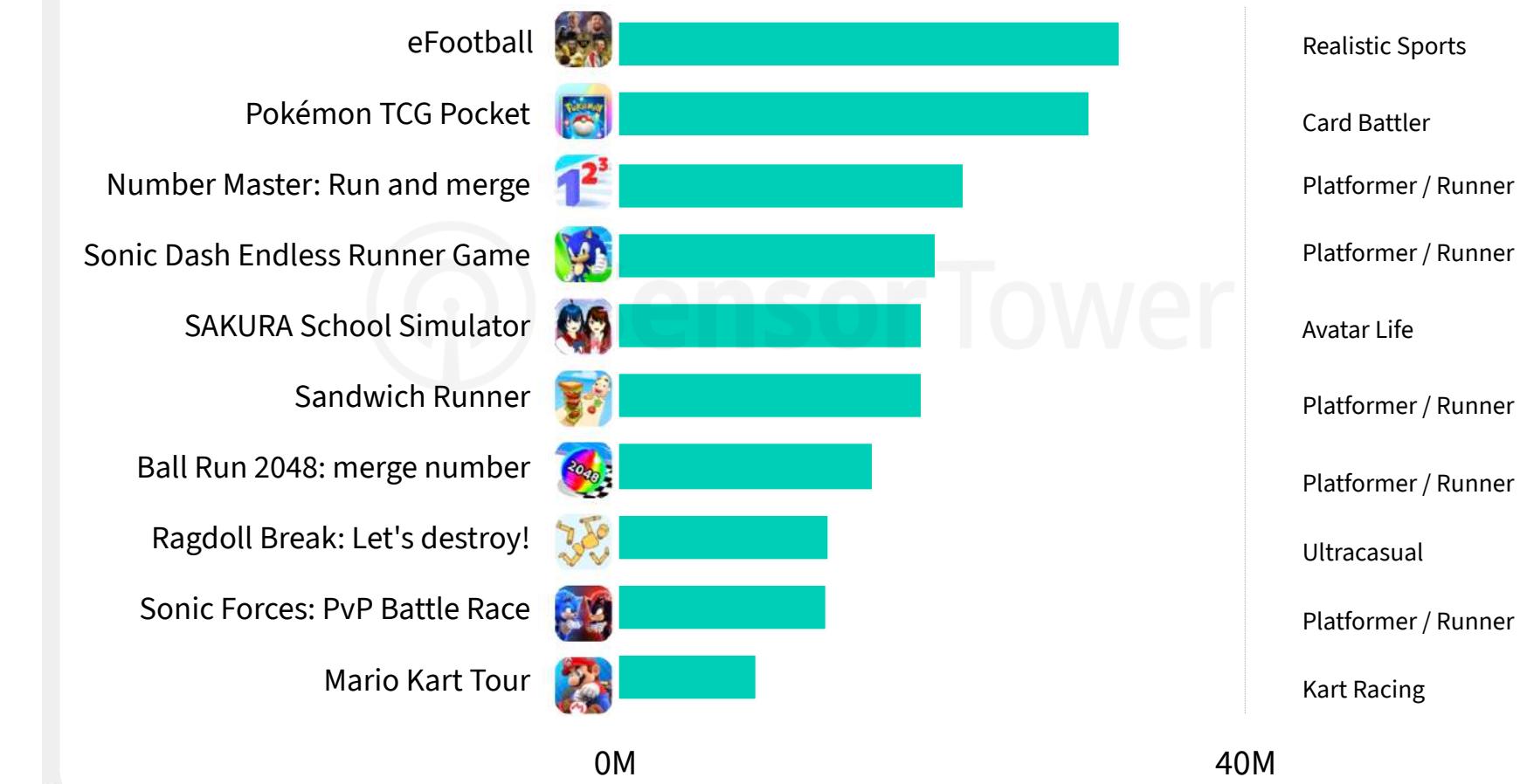
Top 10 Japanese Games by Revenue in Overseas Market

January to July 2025



Top 10 Japanese Games by Downloads in Overseas Market

January to July 2025



In overseas markets, *Pokémon TCG Pocket* and *eFootball* dominate revenue, joined by evergreen IPs like *Dragon Ball Z Dokkan Battle* and *Fate/Grand Order*. This underscores Japan's ability to export core franchises with strong monetization power.

Download rankings tell a different story, where casual and ultracausal hits like *Number Master*, *Sonic Dash*, and *Sandwich Runner* drive mass adoption. Japanese publishers successfully balance high-value IP-driven revenues with lightweight global-friendly experiences that expand reach across broader international audiences.



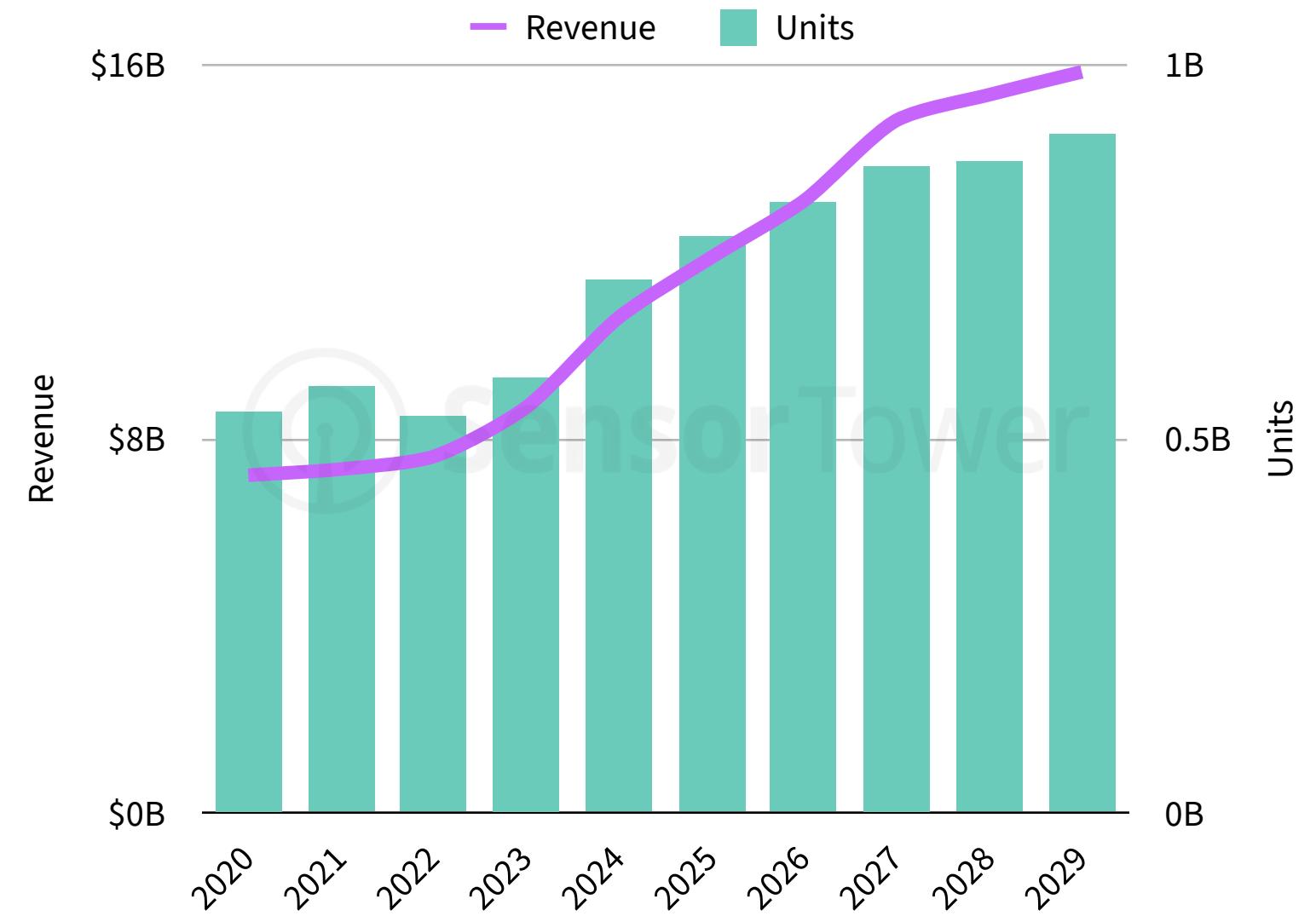
Japan Stronghold in PC/Console Games

Steam Growth Continues as Japan Strengthens PC/Console Game Presence

Data Source: Sensor Tower Video Game Insights as of August 22nd, 2025

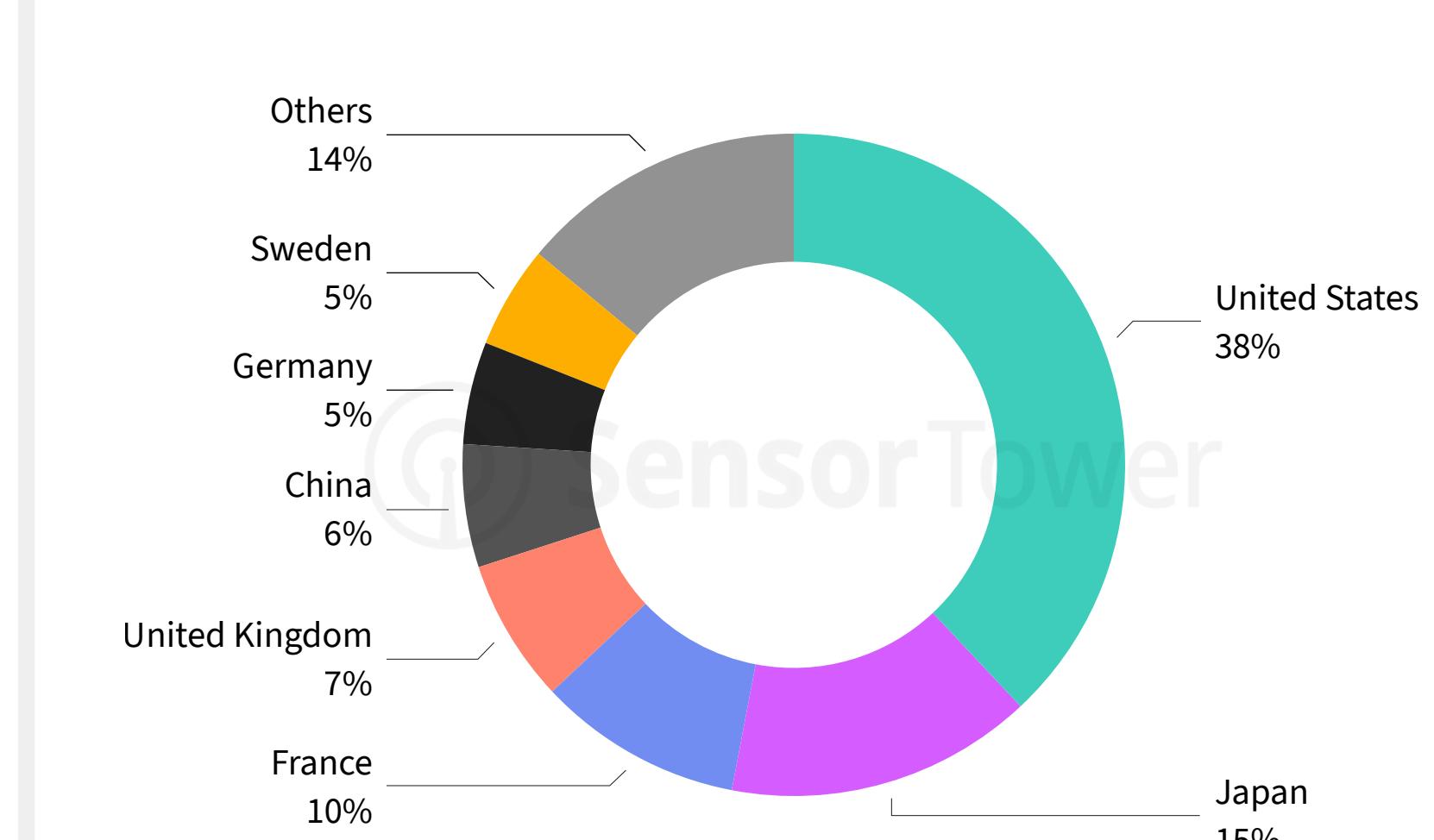
Note: Steam's platform game sales revenue does not include in-game purchase revenue. The sales revenue, unit sales, active users, and cumulative users for the years 2025-2029 are all estimated figures.

Trends in Steam Platform Game Sales Revenue and Unit Sales, 2020–2029



In 2025, game sales revenue and unit sales on the Steam platform are expected to grow by 12% and 8% respectively, reaching \$11.9 billion and 770 million units. By 2029, they are projected to approach \$16 billion and 900 million units, demonstrating strong growth potential.

PC/Console game downloads by publisher HQ country 2025 YTD



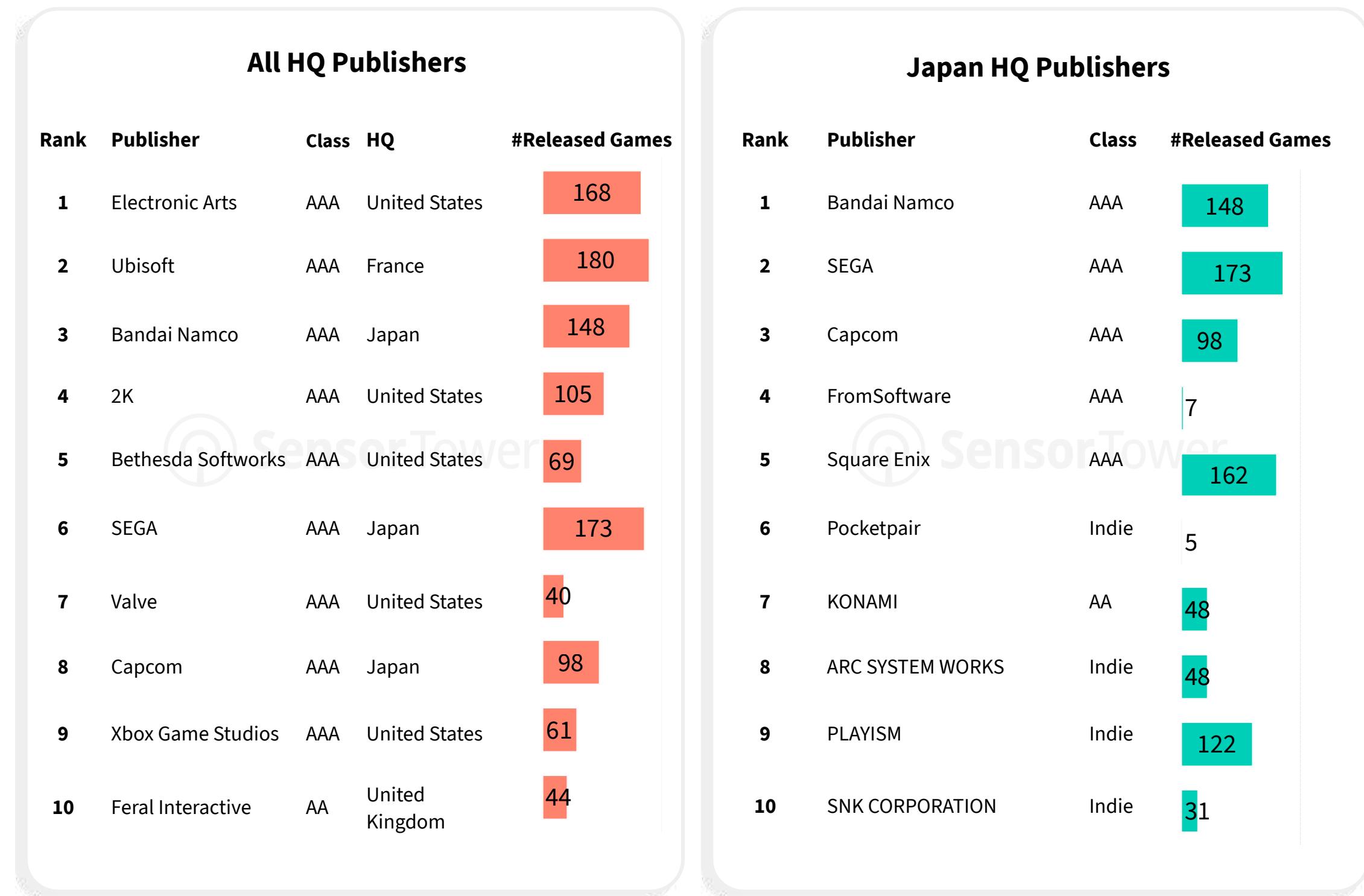
Japan accounts for 15% of worldwide PC/console downloads, second only to the United States at 38%. This highlights Japan's growing influence in the global market, driven by strong IP exports and increasing overseas demand for Japanese-developed titles.

Japanese Publishers Secure Strong Presence on Steam's Global Revenue Charts

Japan maintains a powerful footprint on Steam, with Bandai Namco, SEGA, and Capcom ranking among the global top ten publishers by all-time revenue. Their AAA portfolios highlight Japan's continued strength in cross-platform gaming.

Within Japan, Bandai Namco, SEGA, and Square Enix lead with extensive catalogs, while FromSoftware shows impact despite fewer releases. Indie publishers like Pocketpair, Arc System Works, and Playism also demonstrate Japan's growing creative diversity across PC and console markets.

2025 Steam Publishers by All Time Total Revenue
As of August 22, 2025



Data Source: Sensor Tower Video Game Insights as of August 22nd, 2025

Note: Steam's platform game sales revenue does not include in-game purchase revenue.

From Monster Hunter to Elden Ring: Japanese Publishers Power Steam's Global Hits

Global downloads were led by shooters and sports titles such as *Marvel Rivals* and *EA Sports FC 25*, while RPGs like *Clair Obscur: Expedition 33* also showed strong traction, reflecting a broad appetite for immersive, competitive, and action-driven experiences.

Japanese publishers stood out with hits like *Monster Hunter Wilds*, *Elden Ring*, and *Resident Evil 4*, underscoring their dominance in RPG and action genres. SEGA's Sonic franchise and Pac-Man reboots highlight Japan's enduring influence in arcade and platformer gaming.

Data Source: Sensor Tower Video Game Insights as of August 22nd, 2025

Note: Steam's platform game sales revenue does not include in-game purchase revenue.

2025 Steam Games by Downloads

2025 Year to Date

Top Games by All HQ Publishers

| | | | |
|----|---|--|------------------|
| 1 |  | Marvel Rivals | Shooter |
| 2 |  | EA SPORTS FC 25 | Hero Shooter |
| 3 |  | Monster Hunter Wilds | Sports |
| 4 |  | Clair Obscur: Expedition 33 | Simulation |
| 5 |  | NBA 2K25 | Sports |
| 6 |  | R.E.P.O. | Simulation |
| 7 |  | UFC 5 | Sports |
| 8 |  | Split Fiction | Action |
| 9 |  | PEAK | Action-Adventure |
| 10 |  | The Elder Scrolls IV: Oblivion Remastered | Action |

Top games by Japan HQ Publishers

| | | | |
|----|---|----------------------------------|--------------|
| 1 |  | Monster Hunter Wilds | RPG |
| 2 |  | ELDEN RING NIGHTREIGN | Action RPG |
| 3 |  | ELDEN RING | Shooter |
| 4 |  | Resident Evil 4 | Hero Shooter |
| 5 |  | Sonic Colors: Ultimate | RPG |
| 6 |  | FINAL FANTASY VII REBIRTH | Action |
| 7 |  | Sonic Frontiers | Survival |
| 8 |  | PAC-MAN WORLD Re-PAC | Horror |
| 9 |  | PowerWash Simulator | Arcade |
| 10 |  | DRAGON BALL XENOVERSE 2 | Platformer |



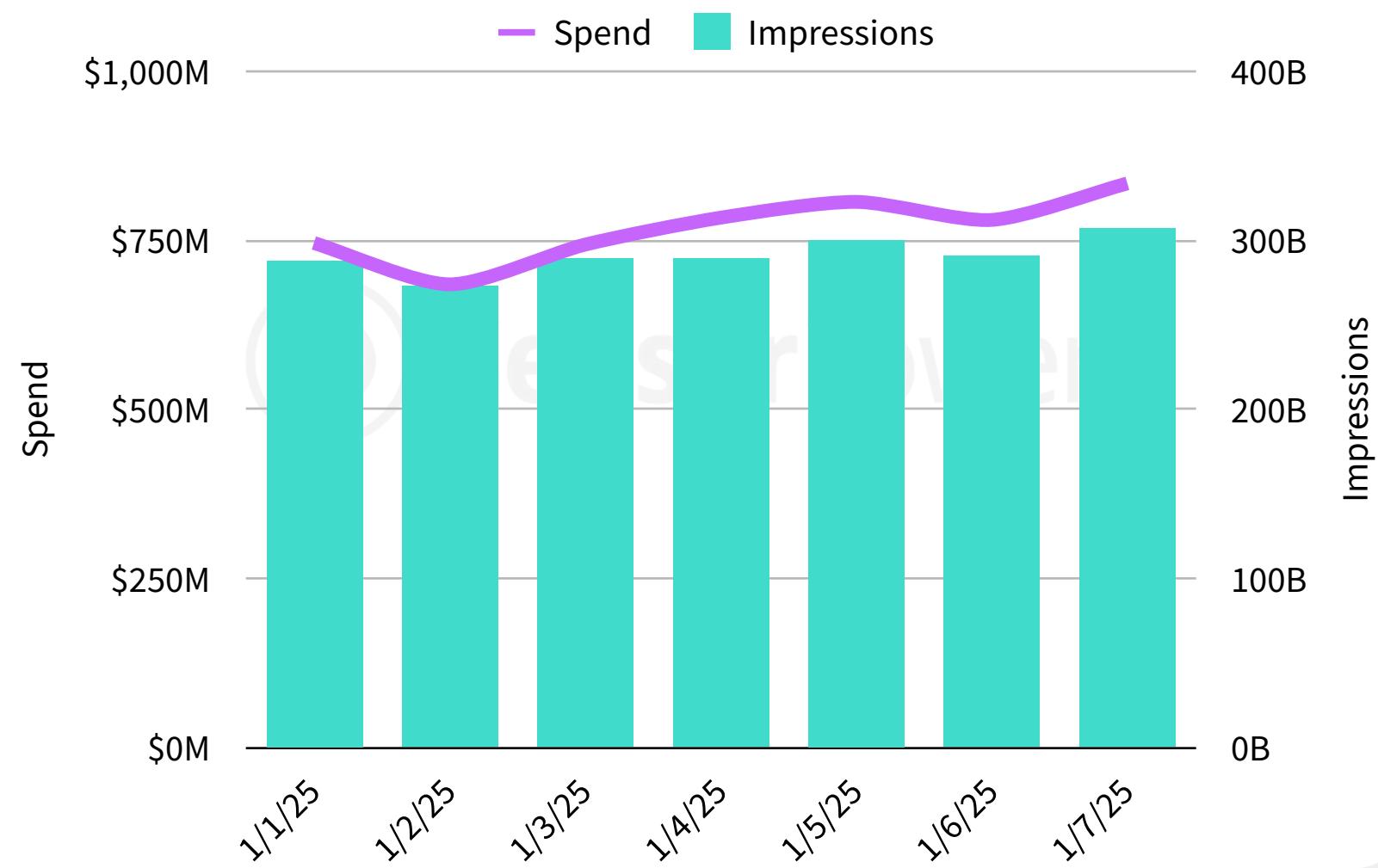
Japan Game Advertising Overview

Gaming Emerges as a Core Growth Driver in Japan's Digital Advertising

Source: Sensor Tower – Advertising Insights by Pathmatics

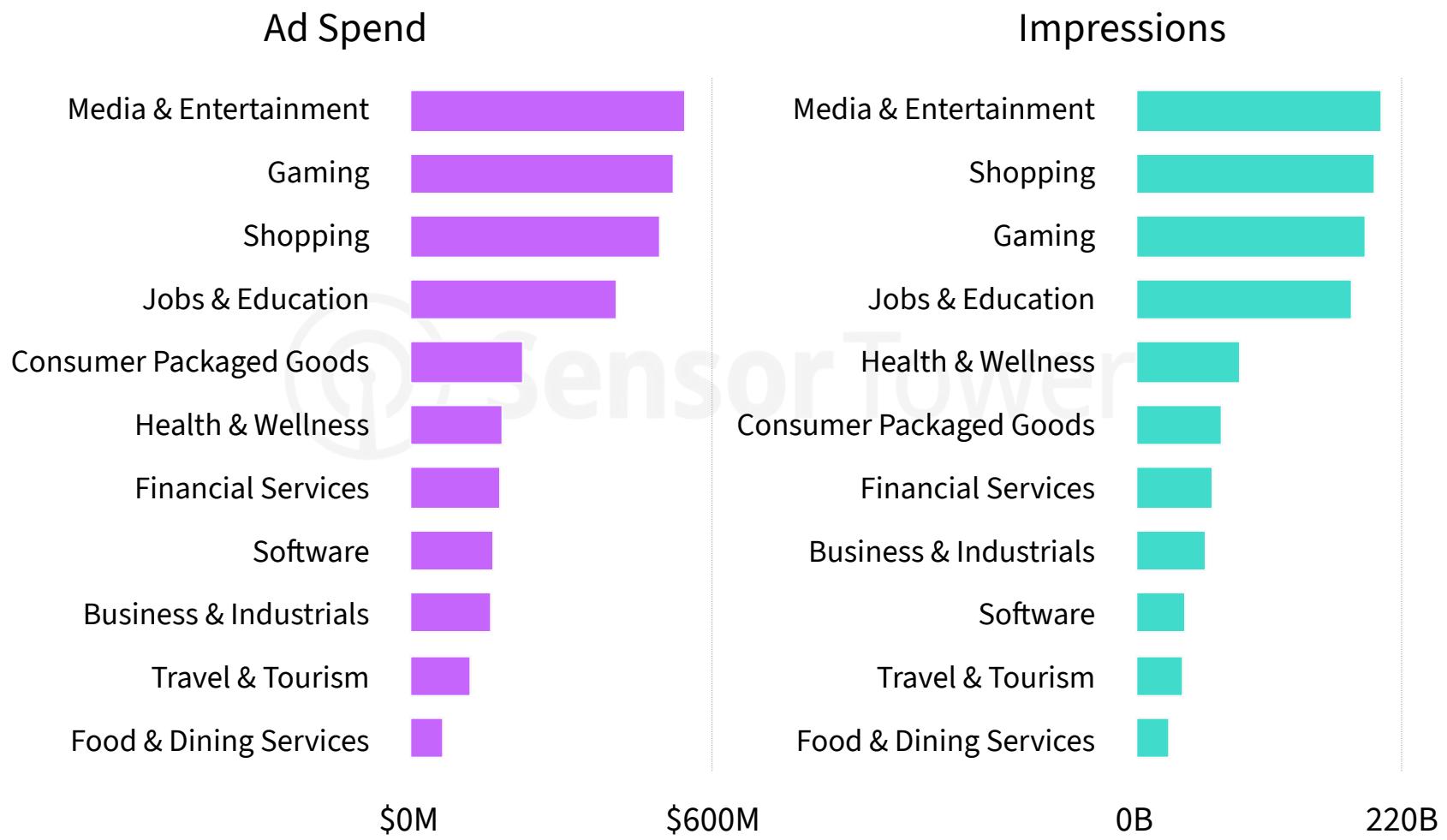
Note: This report includes data from Facebook, Instagram, LINE (from April 2025), Mobile App Ad Networks, TikTok, X, and YouTube, covering the period from January to June 2025.

Japan Digital Ad Spend and Impressions H1 2025



Japan's digital ad spend in H1 2025 remained steady at around \$750M monthly, with impressions surpassing 300B. Media & Entertainment led overall investment, but Gaming secured a top-three position, signaling its critical role in digital ad growth.

Japan Top Categories by Digital Ad Spend and Impression H1 2025



Gaming's prominence highlights rising competition for player attention across PC, console, and mobile. With impressions rivaling shopping and entertainment, the sector demonstrates its influence as both a cultural and commercial driver, reinforcing gaming's importance in Japan's digital advertising landscape.

Japan Gaming Advertising Remains LINE-Centric with Broad Channel Support in H1 2025

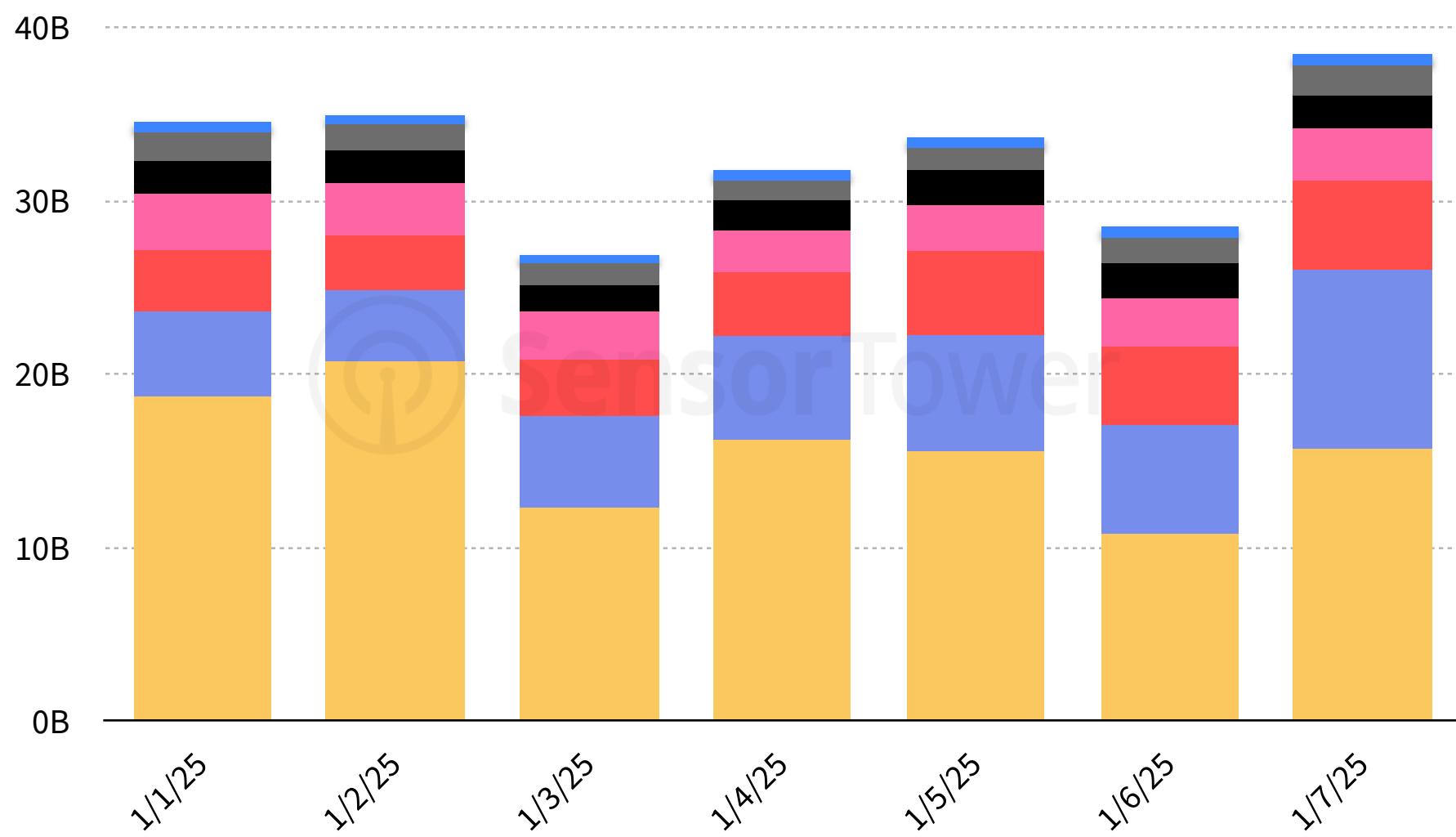
In H1 2025, Japan's gaming ad impressions remained heavily concentrated on LINE, which consistently led as the top channel each month. Despite fluctuations, LINE's dominance underscores its unmatched role in reaching Japan's mobile-first gaming audience, while other platforms provided complementary scale.

YouTube, Instagram, TikTok, and X delivered steady secondary contributions, highlighting a diversified strategy beyond LINE. Notably, Mobile Apps emerged as the second-largest channel, sustaining a strong share throughout the period. This balance shows advertisers pairing LINE's reach with multi-platform visibility to maximize campaign effectiveness.

Japan Monthly Gaming Ad Impressions by Ad Channels

H1 2025

Line MobileApps YouTube Instagram TikTok X Facebook



Source: Sensor Tower – Advertising Insights by Pathmatics

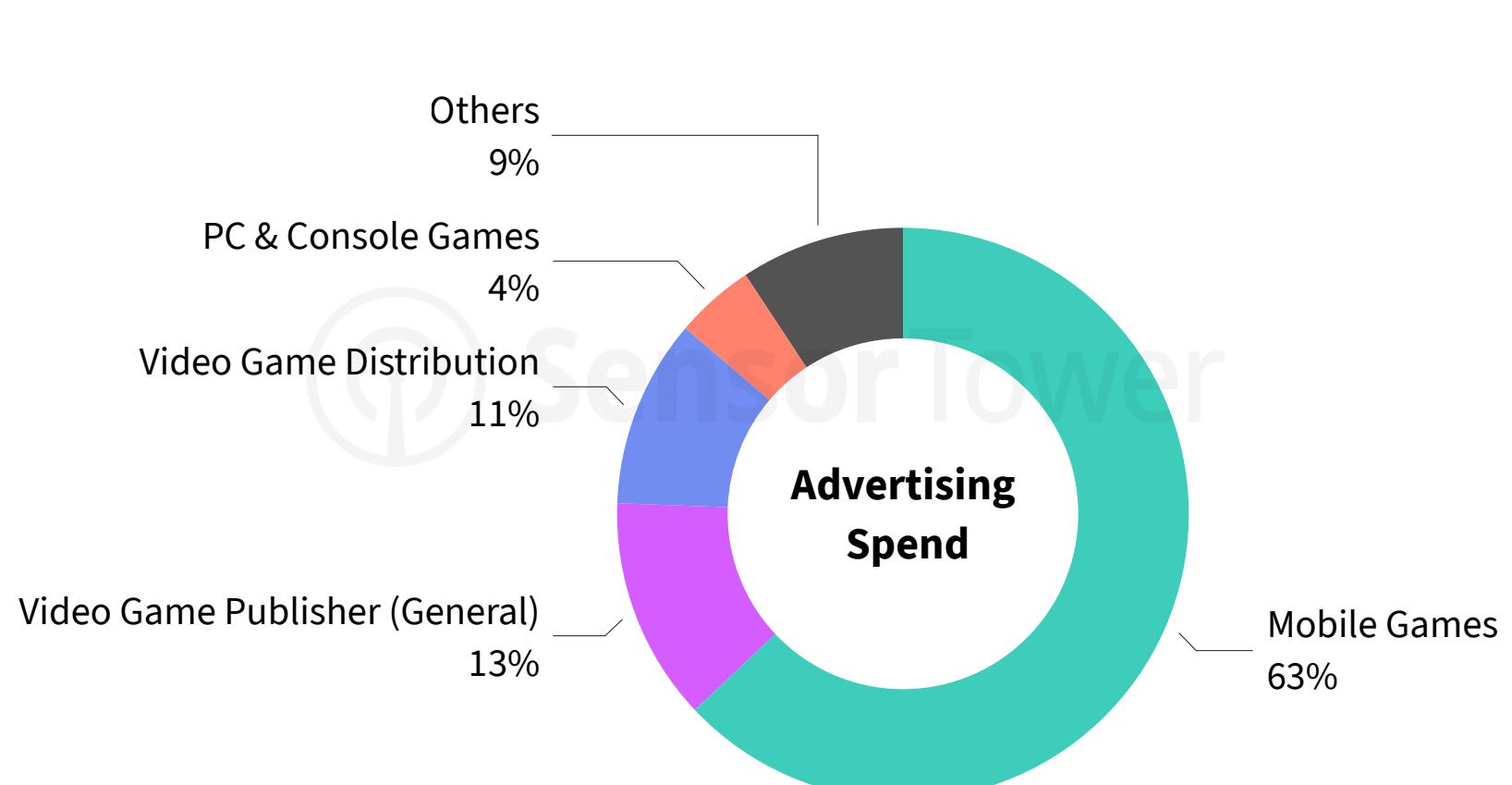
Note: This report includes data from Facebook, Instagram, LINE (from April 2025), Mobile App Ad Networks, TikTok, X, and YouTube, covering the period from January to July 2025.

Action & Strategy Dominate Japan's Mobile Gaming Ad Spend, While Shooters Lead PC & Console Genre Investment

Source: Sensor Tower – Advertising Insights by Pathmatics

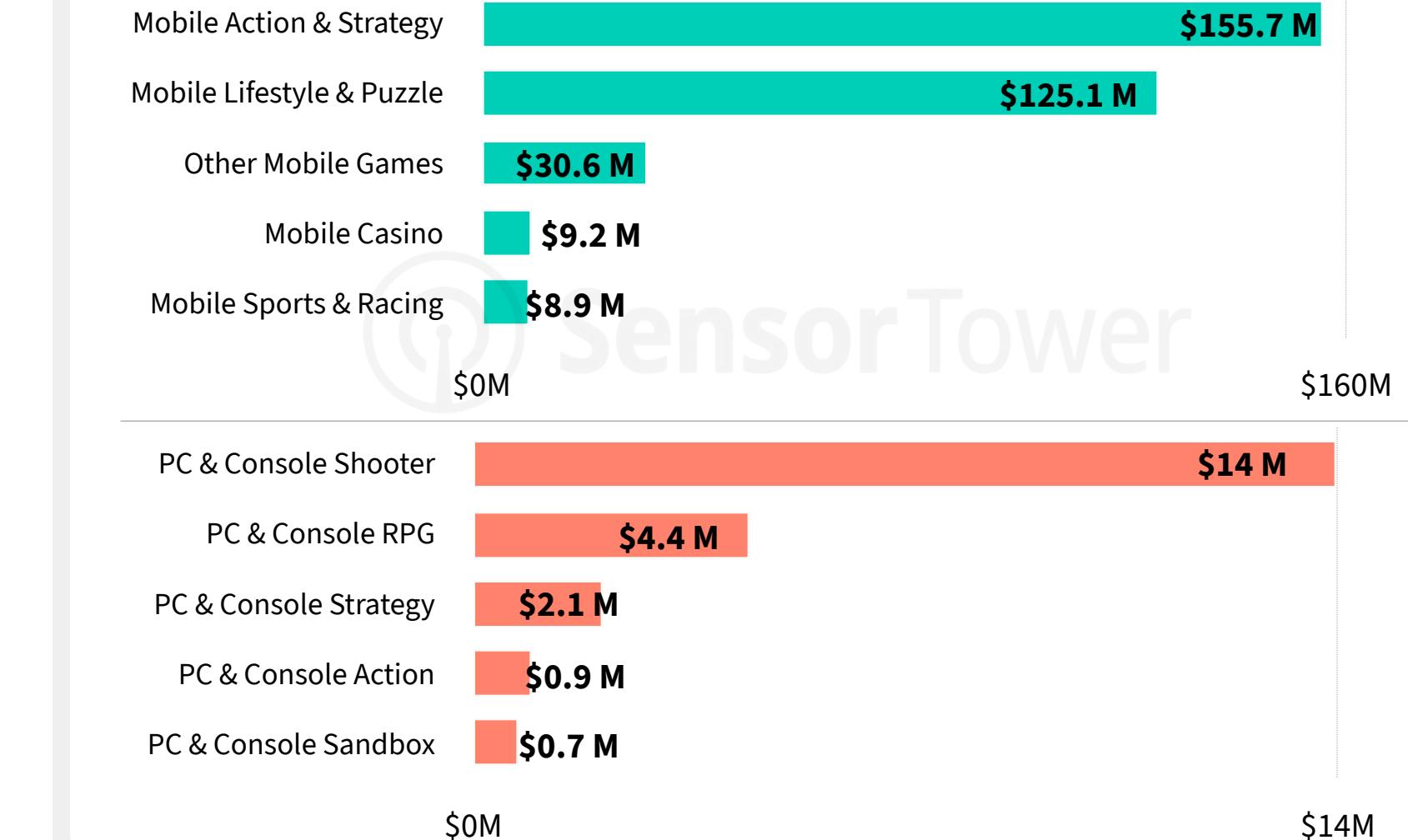
Note: This report includes data from Facebook, Instagram, LINE (from April 2025), Mobile App Ad Networks, TikTok, X, and YouTube, covering the period from January to June 2025.

Gaming Top Sub Categories by Digital Ad Spend Japan H1 2025



Mobile games accounted for 63% of Japan's gaming ad spend in H1 2025, led by Action & Strategy and Lifestyle & Puzzle genres. Strong investment reflects publishers' push to capture casual and mid-core mobile audiences at scale.

Mobile, PC & Console Gaming Top Sub Genres by Ad Spend Japan H1 2025



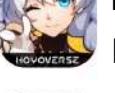
By contrast, PC & console advertising was more targeted, with Shooters leading at around \$14M, far outpacing RPGs and Strategy. This highlights the concentrated push behind blockbuster titles, as console publishers emphasize fewer but high-impact franchises in Japan's market.

Japan Gaming Ad Impressions in H1 2025 Driven by Mobile Hits and Strong Console Investment in Shooters & RPGs

Source: Sensor Tower – Advertising Insights by Pathmatics

Note: This report includes data from Facebook, Instagram, LINE (from April 2025), Mobile App Ad Networks, TikTok, X, and YouTube, covering the period from January to June 2025.

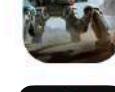
Mobile - Action & Strategy

| | | |
|----|---|---|
| 1 |  | PONOS Corporation |
| 2 |  | Century Games |
| 3 |  | Joy Net Games |
| 4 |  | Last War: Survival Game (FUNFLY) |
| 5 |  | Tencent |
| 6 |  | Habby PTE. LTD. |
| 7 |  | The Pokémon Company |
| 8 |  | miHoYo Co., Ltd. |
| 9 |  | 37GAMES |
| 10 |  | Sony Interactive Entertainment |

Mobile Lifestyle & Puzzle

| | | |
|----|---|---|
| 1 |  | Niantic, Inc. |
| 2 |  | HuuugeGames (Huuuge Global) |
| 3 |  | Dream Games |
| 4 |  | Cocone Global |
| 5 |  | Take-Two Interactive Software, Color Block Jam |
| 6 |  | Whoyaho Corp. |
| 7 |  | Universal Mobile Games |
| 8 |  | Supercent, Inc. |
| 9 |  | Square Enix Holdings Co., Ltd. |
| 10 |  | Bandai Namco Group |

PC & Console Shooter

| | | |
|----|---|---|
| 1 |  | Tencent |
| 2 |  | Wargaming.net |
| 3 |  | Epic Games, Inc. |
| 4 |  | Microsoft |
| 5 |  | Splitgate (1047 Games, LLC) |
| 6 |  | Wildlife Studios |
| 7 |  | MY.GAMES |
| 8 |  | Seasun Games |
| 9 |  | Gaijin Entertainment Corporation |
| 10 |  | Bandai Namco Group |

PC & Console RPG

| | | |
|----|---|---------------------------------------|
| 1 |  | Nexters (GDEV Inc.) |
| 2 |  | SEGA Corporation |
| 3 |  | Stillfront Group AB |
| 4 |  | Capcom Entertainment, Inc. |
| 5 |  | miHoYo Co., Ltd. |
| 6 |  | Square Enix Holdings Co., Ltd. |
| 7 |  | HaoPlay Limited |
| 8 |  | Nintendo |
| 9 |  | Netmarble Corporation |
| 10 |  | Embracer Group AB |



PONOS Corporation

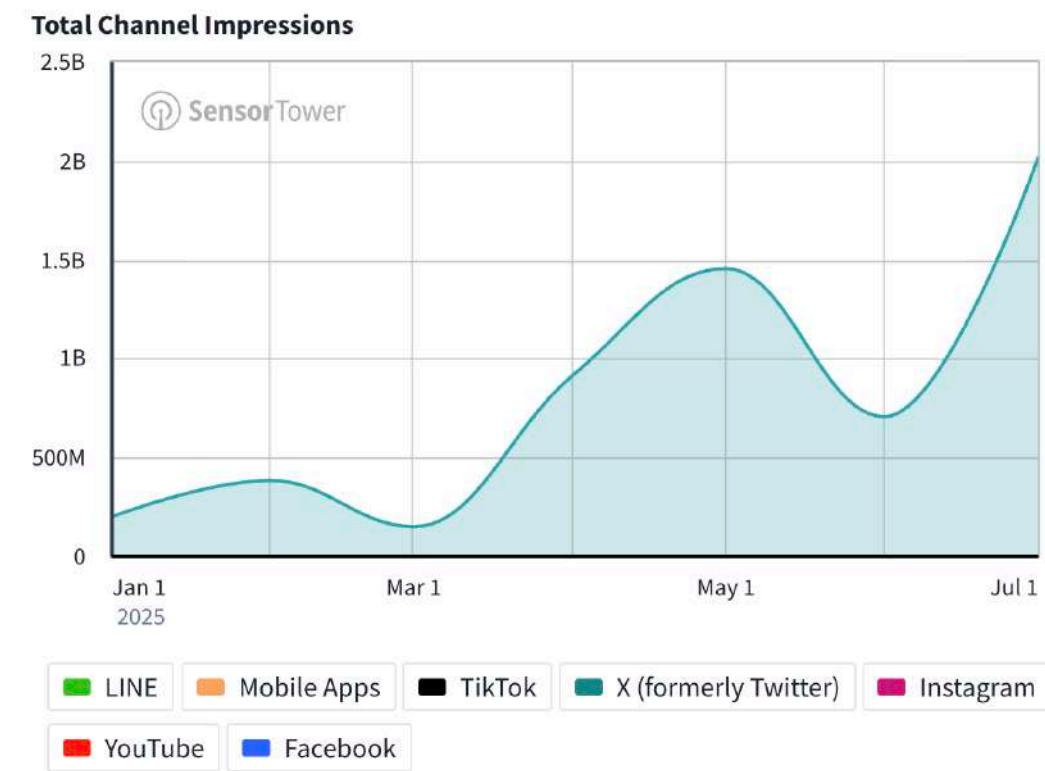
The Battle Cats

The *Battle Cats*, developed by PONOS Corporation, continues to be one of Japan's most iconic and enduring mobile titles. Known for its quirky art style and humorous gameplay, the game has sustained strong popularity through frequent collaborations and creative ad campaigns.

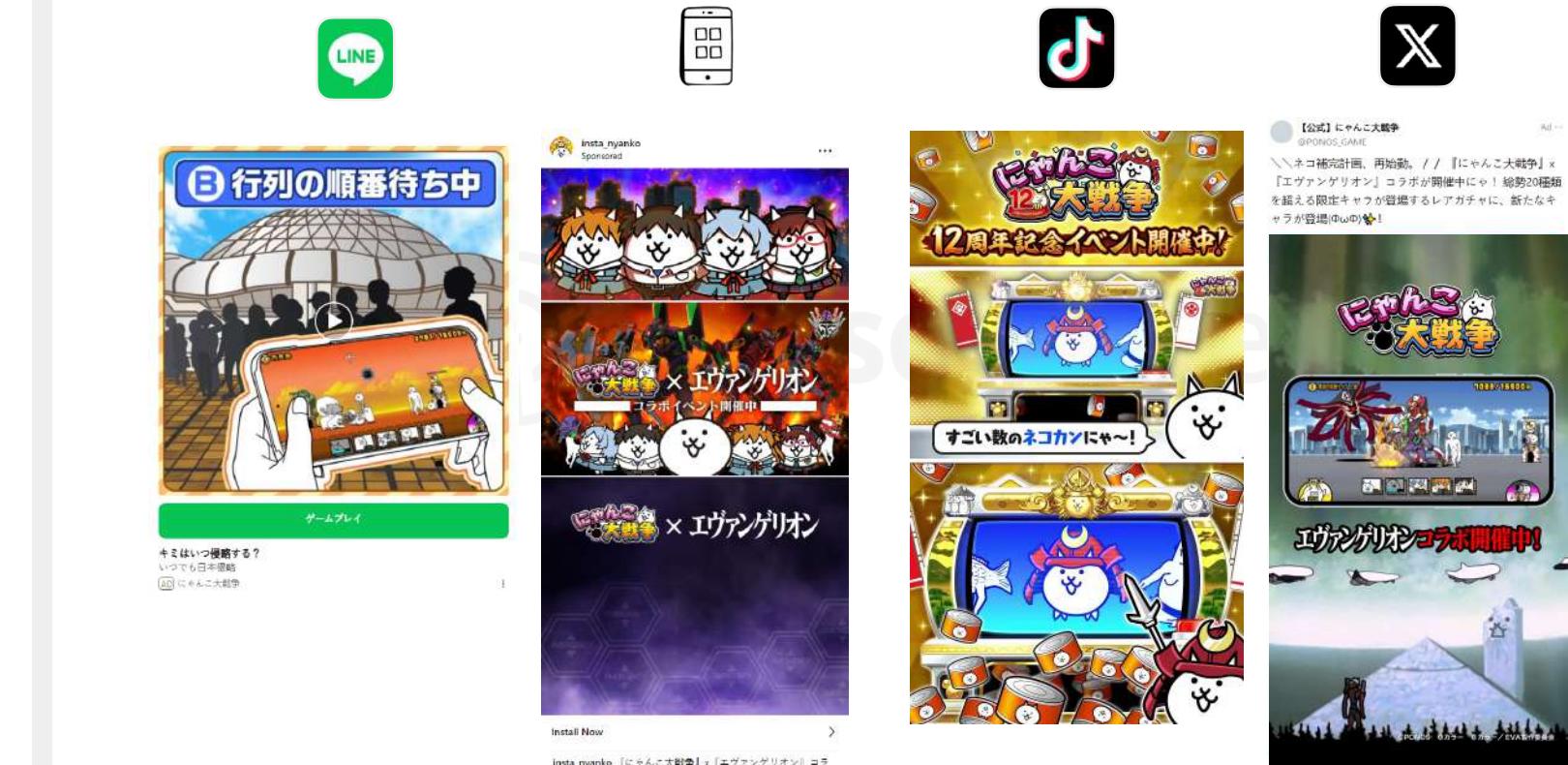
Source: Sensor Tower – Advertising Insights by Pathmatics

Note: This report includes data from Facebook, Instagram, LINE (from April 2025), Mobile App Ad Networks, TikTok, X, and YouTube, covering the period from January to July 2025.

Ponos Corporation Total Impressions and Channel Breakdown



Creative Gallery for Ponos Corporation Japan



In H1 2025, PONOS Corporation generated over 3.8B ad impressions, with LINE accounting for 89% of exposure—underscoring the platform's unmatched importance in Japan's mobile ecosystem. Major spikes in May and July reflected the game's 12th anniversary campaign and a high-profile *Evangelion* collaboration, both of which boosted engagement and reinforced the title's staying power.

Ad creatives emphasized playful cross-IP storytelling, blending the quirky *Battle Cats* aesthetic with iconic *Evangelion* imagery. Campaigns also employed humor, vibrant visuals, and nostalgic callbacks to energize fans, while secondary pushes on Instagram, X, and YouTube extended reach beyond LINE. This creative mix showcased how milestone-driven and collaboration-led ads can reinvigorate long-running IPs.



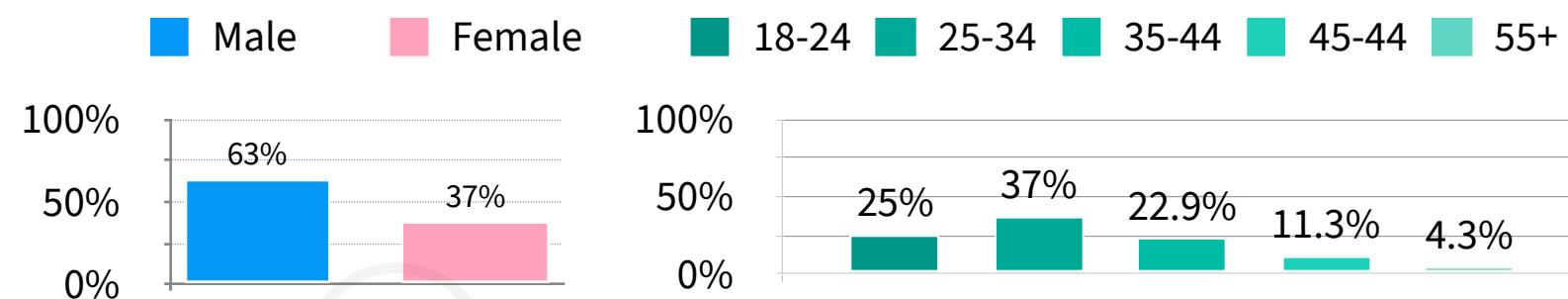
Century Games Whiteout Survival

Whiteout Survival from Century Games has quickly built a strong following in Japan. With immersive survival themes and high-quality creatives, the title appeals to a wide spectrum of players while leaning heavily on TikTok and Instagram for visibility.

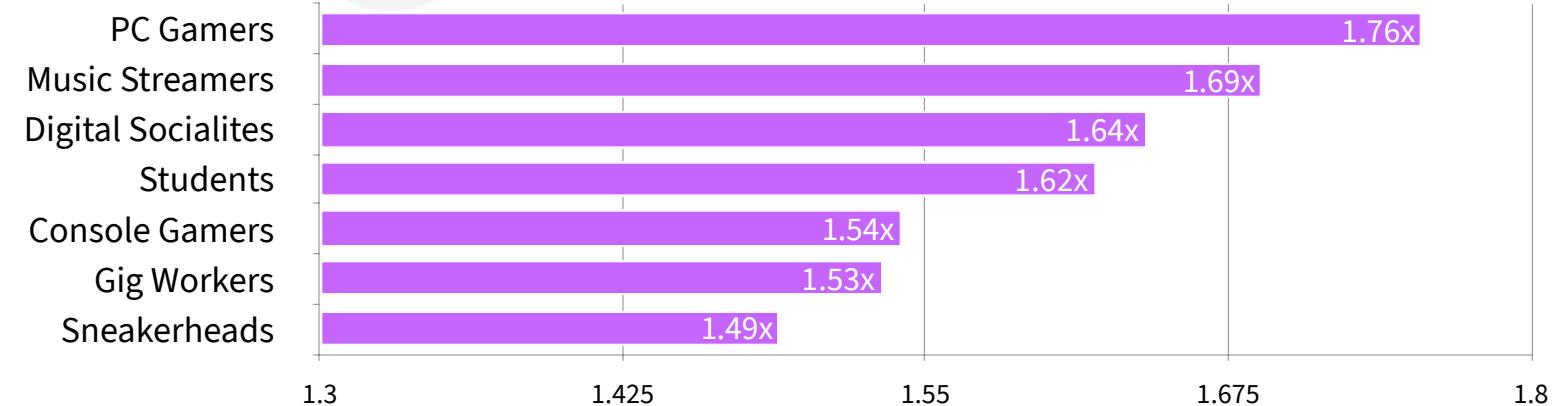
Source: Sensor Tower – Advertising Insights by Pathmatics

Note: This report includes data from Facebook, Instagram, LINE (from April 2025), Mobile App Ad Networks, TikTok, X, and YouTube, covering the period from January to July 2025.

Century Games Audience Overview and Personas H1 2025 Japan

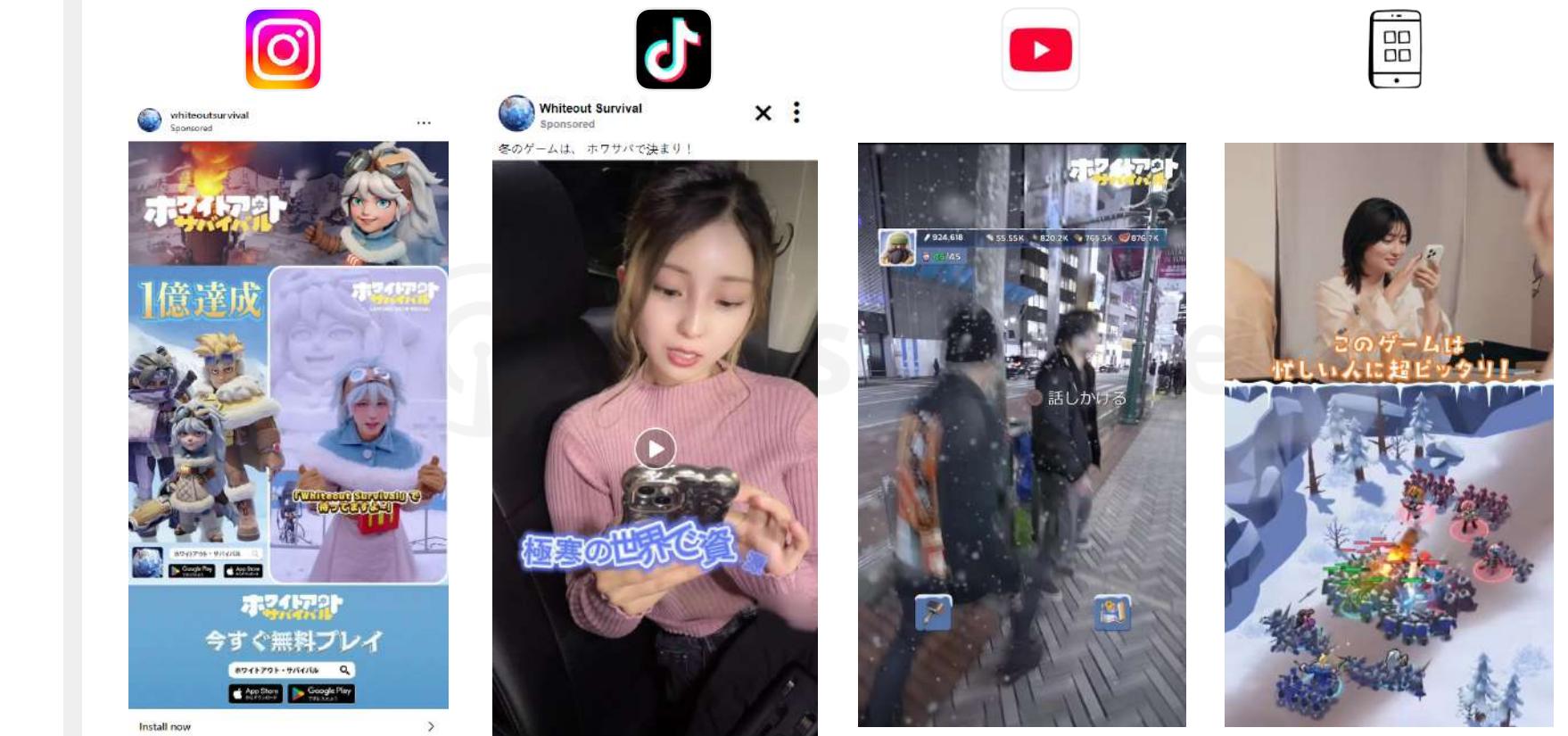


Century Games Audience vs. General Population % Difference



Audience analysis shows a male-dominated base (63%), with the core aged 25–34. The game over-indexes among PC gamers (1.76x) and music streamers (1.69x), highlighting a tech-savvy, entertainment-driven demographic that engages deeply with gaming and lifestyle media.

Creative Gallery for Century Games Japan



Creative campaigns in Japan lean into cinematic **storytelling**, **humor**, and **seasonal themes** like **winter survival**, **blending real-world and in-game environments**. This resonates with **students**, **digital socialites**, and **console gamers**, reinforcing Century Games' relevance while expanding its foothold in Japan's competitive market.

Conclusion

1

Japan Mobile Market: High-Value, Stable Growth

Japan remains a global mobile gaming powerhouse, generating over \$11B in IAP revenue despite fewer downloads. Its strength lies in high ARPU, deep cultural gaming roots, and loyal players sustaining monetization through mature live ops strategies.

2

Genre & Game Performance Dynamics

RPGs and strategy titles continue to dominate Japan's revenue charts, while casual genres sustain download momentum. *SD Gundam G Generation ETERNAL*, *Last War: Survival* and *Honkai: Star Rail* highlight how event-driven content drives monetization, engagement, and recurring revenue spikes across top-performing titles.

3

Publishers & Platforms: Global Reach, Domestic Spend

Japanese mobile game publishers export content widely, with most downloads overseas, yet two-thirds of revenue still originates domestically.

Capcom, Bandai Namco, and Square Enix maintain strong global relevance with hits across PC, console, and mobile. Japan's publishers excel in RPG, action, and IP-driven franchises, reinforcing their enduring influence in shaping international gaming trends and Steam chart success.

4

Advertising and Engagement Innovation

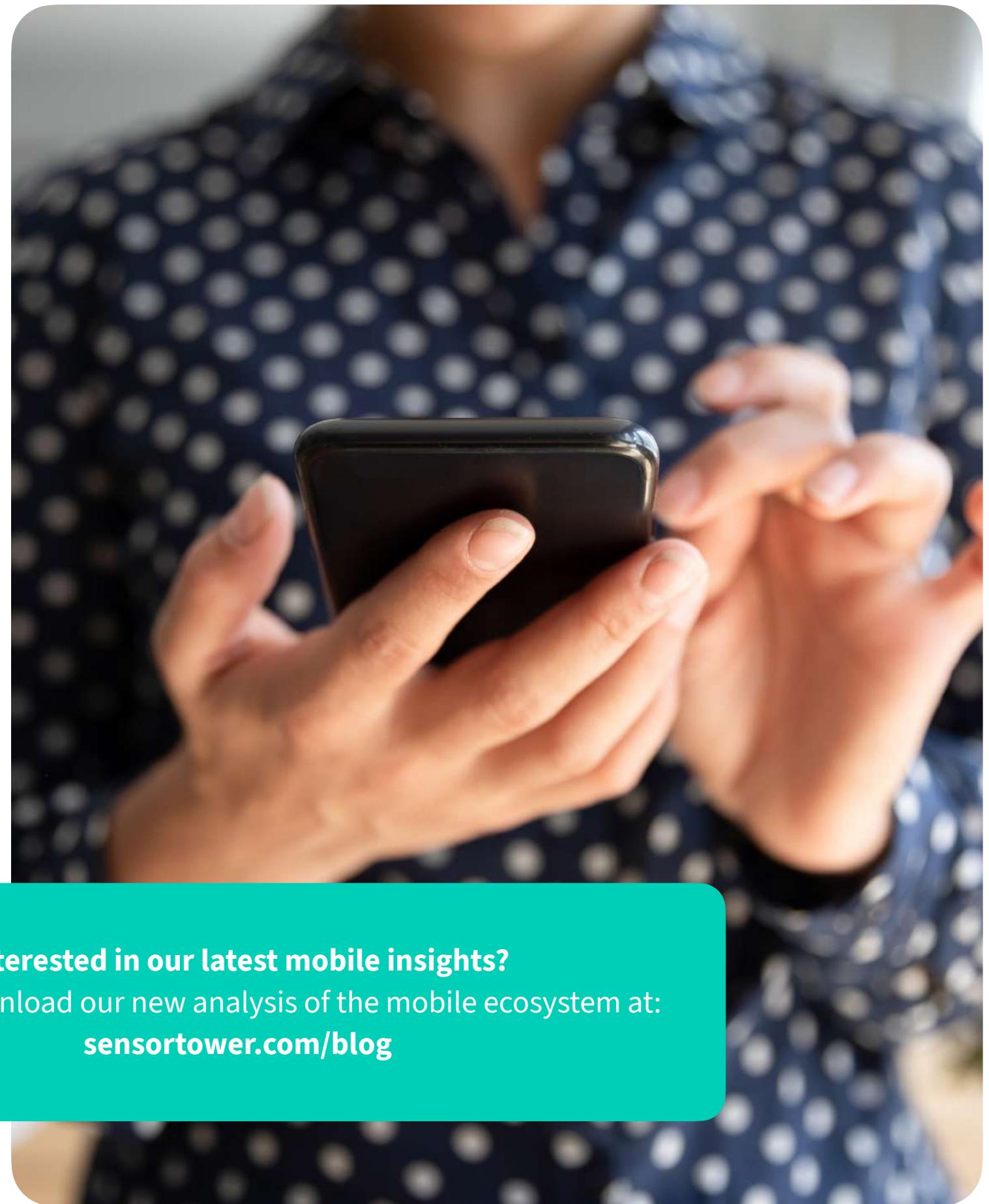
Gaming is now one of Japan's leading digital ad categories, with LINE and Mobile Apps driving the majority of exposure. Case studies like *The Battle Cats* and *Whiteout Survival* demonstrate how cross-IP collaborations, seasonal campaigns, and culturally resonant creatives re-energize audiences, underscoring advertising's pivotal role in sustaining market leadership.

Sensor Tower

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About us

Sensor Tower is the leading solution for mobile marketers, app developers, and industry analysts who demand competitive insights on the mobile economy. Sensor Tower's product suite includes: App Intelligence, Store Intelligence, Ad Intelligence, and Usage Intelligence.



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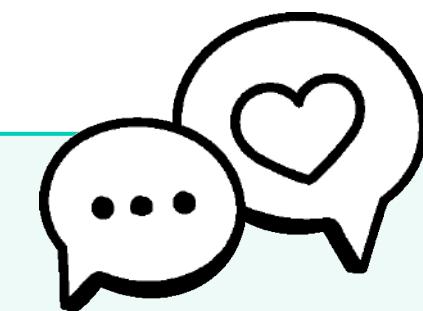


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