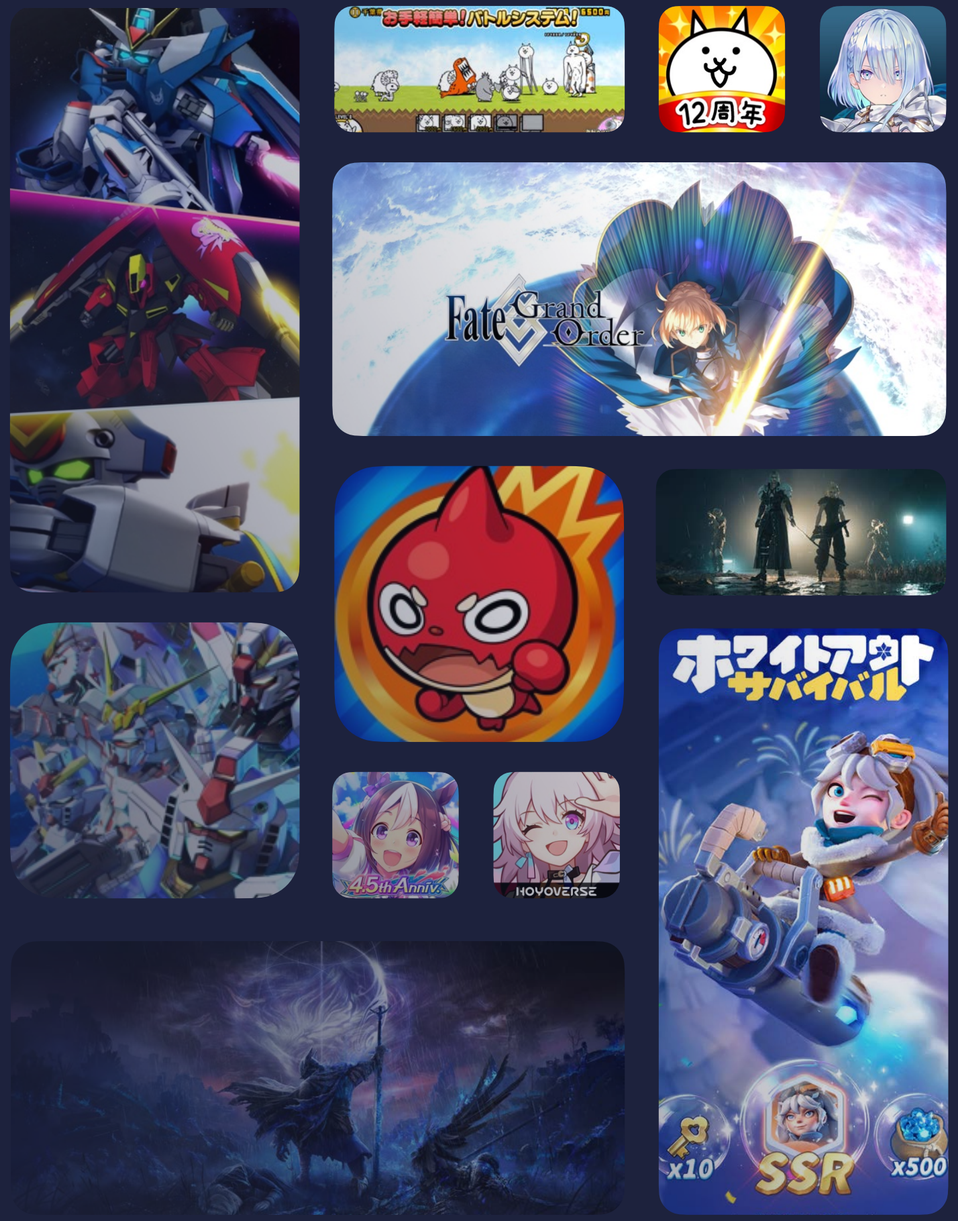
SensorTower

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.

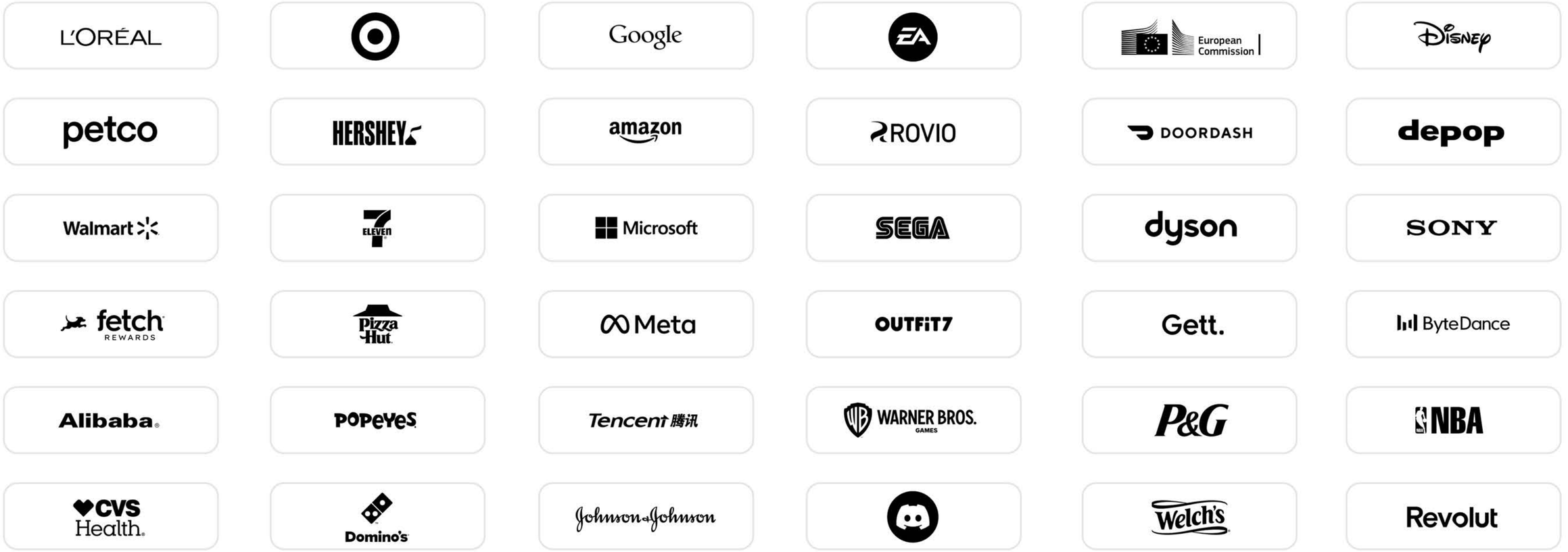


Press Inquiries: press-apac@sensortower.com
Business Inquiries: sales@sensortower.com

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Sensor Tower | Our Customers

Top publishers trust Sensor Tower insights to grow their business.



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

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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.

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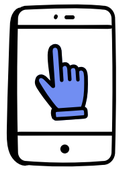
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Gaming Insights

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.

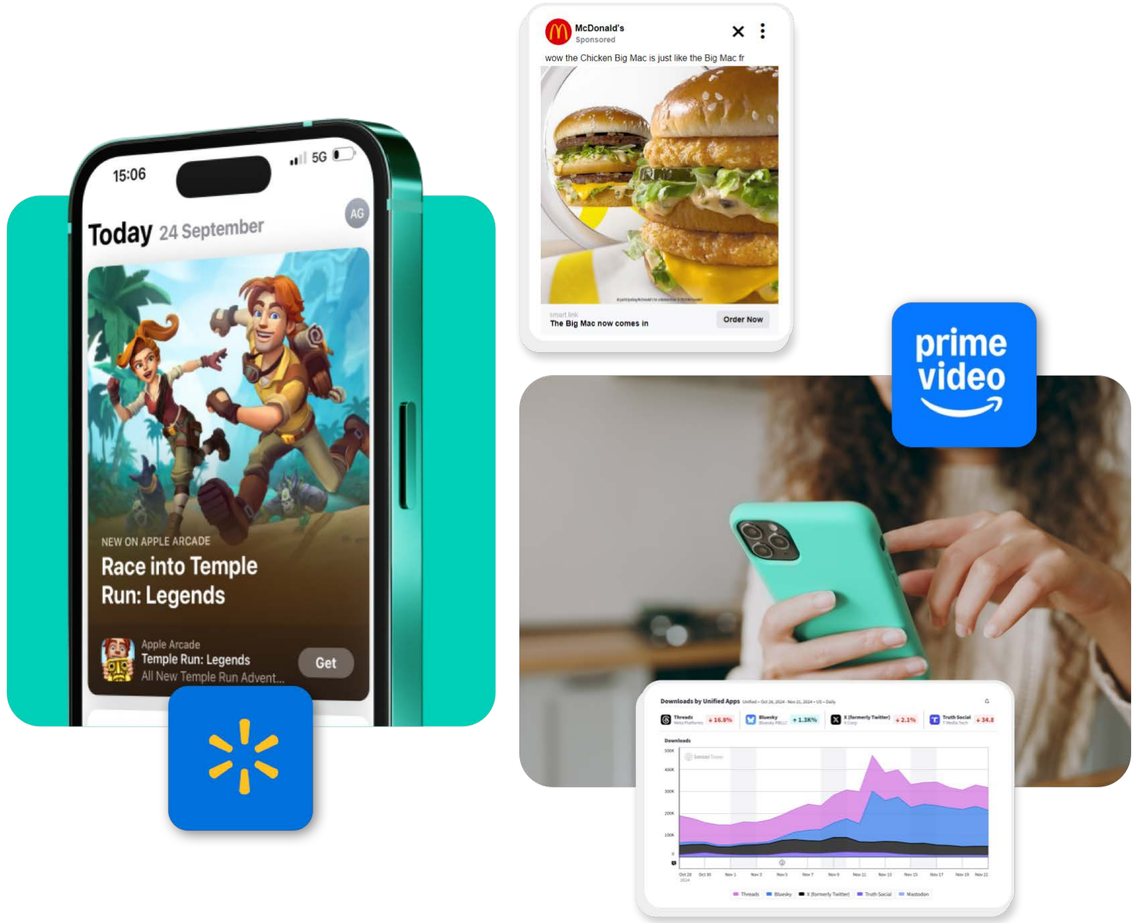
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Sensor Tower
Executive Summary

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 Instragram	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	•	•		•	•	•		•	•	•	•	•	•

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Overview of
Japan Mobile Game Market

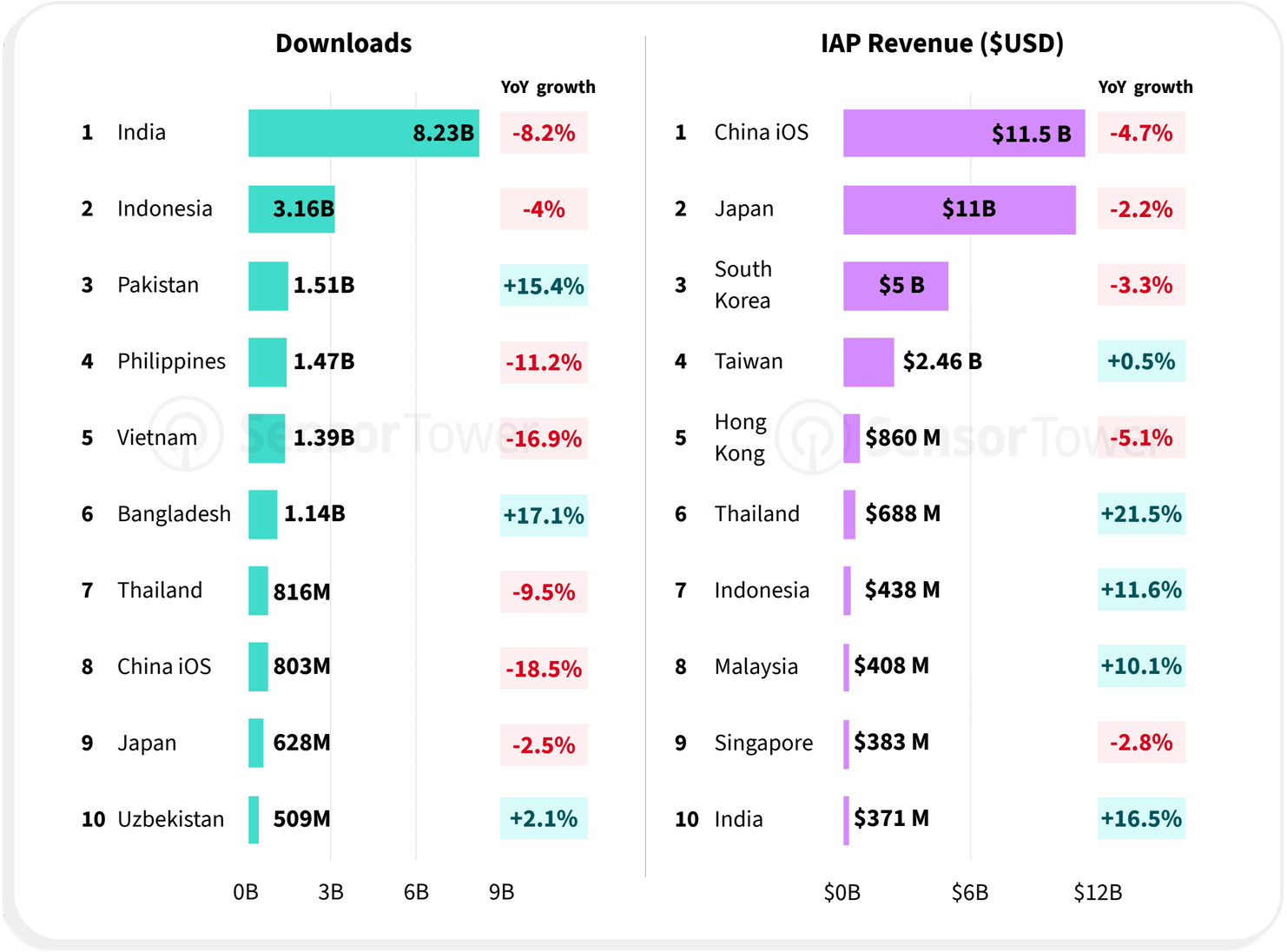
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Beyond Scale: Inside Japan's High-Value Mobile Gaming Economy

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.

Top Mobile Game Markets in Asia
12 Months to July 2025

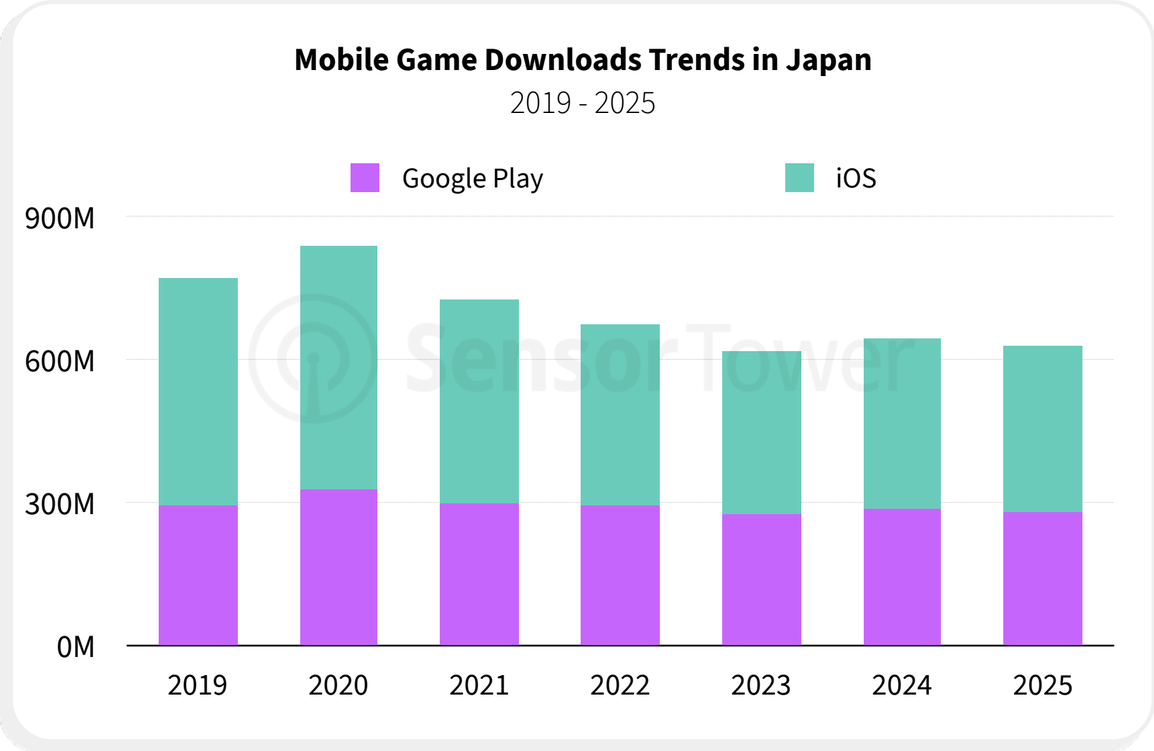


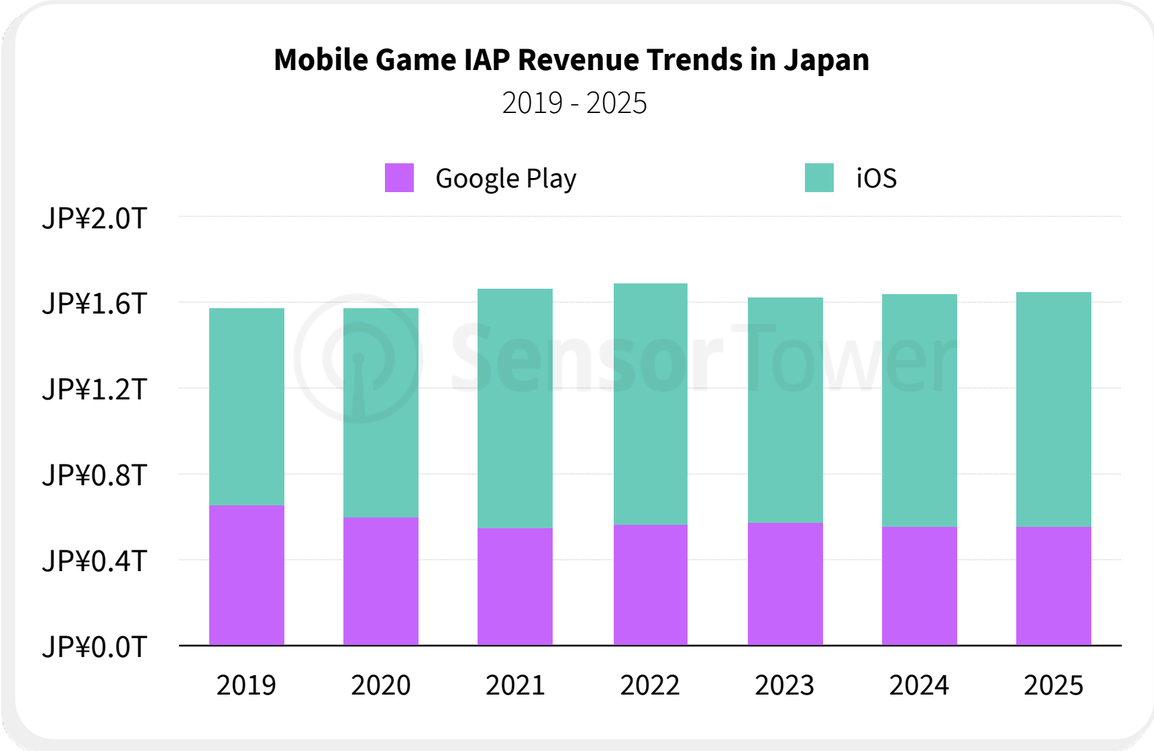
Data Source: Sensor Tower App Performance Insights as of September 1, 2025. Yearly data are based on a 12-month rolling total ending in July of each year (e.g., August 2024–July 2025 for 2025).
Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

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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.





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.

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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.

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.

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

Revenue

			vs Previous
1	**Pokémon TCG Pocket** The Pokémon Company	Strategy Card Battler	▲ 4
2	**Last War:Survival** FUNFLY	Strategy 4X Strategy	=
3	**Monster Strike** mixi	RPG Puzzle RPG	▼ 2
4	**Fate/Grand Order** Sony Corporation	RPG Turn-based RPG	▼ 1
5	**Honkai: Star Rail** miHoYo	RPG Turn-based RPG	▲ 4
6	**Umamusume: Pretty Derby** CyberAgent	RPG Squad RPG	▼ 2
7	**Whiteout Survival** Century Games	Strategy 4X Strategy	▲ 9
8	**SD Gundam G Generation** BANDAI NAMCO Entertainment	Strategy Turn-Based Tactics	NEW
9	**eFootball** Konami	Sports Realistic Sports	▲ 2
10	**PROFESSIONAL BASEBALL SPIRITS A** Konami	Sports Realistic Sports	▼ 4

Revenue Growth

			vs Previous
1	**SD Gundam G Generation ETERNAL** BANDAI NAMCO Entertainment	Strategy Turn-Based Tactics	NEW
2	**Pokémon TCG Pocket** The Pokémon Company	Strategy Card Battler	▲ 4
3	**Shadowverse: Worlds Beyond** CyberAgent	Strategy Card Battler	NEW
4	**Whiteout Survival** Century Games	Strategy 4X Strategy	▲ 9
5	**The Battle Cats** PONOS	Strategy Real-Time Strategy	▲ 17
6	**Madoka Magica Magia Exedra** Sony Corporation	RPG Turn-based RPG	NEW
7	**Archero 2** HABBY	Action Shoot 'em Up	NEW
8	**Wuthering Waves** Kuro	RPG Open World Adventu	▲ 19
9	**Gossip Harbor: Merge & Story** Microfun	Puzzle Match Merge 2	▲ 70
10	**TopHeroes** River Game HK	Strategy 4X Strategy	▲ 47

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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.

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.

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 Tactic	NEW
3	**Block Blast!** HungryStudio	Puzzle	Block	▲ 5
4	**Color Block Jam** Take-Two Interactive	Puzzle	Block	▲
5	**Car Jam** Shycheese	Puzzle	Sort	▲ 9
6	**Chiikawa Pocket** CyberAgent	RPG	Idle RPG	NEW
7	**Screw Sort 3D - Pin Puzzle** Mindscaplay	Puzzle	Physics	▲ 58
8	**Whiteout Survival** Century Games	Strategy	4X Strategy	▼ 5
9	**Who's next to you? 隣の席はだ** Tokyo Communications Group	Puzzle	Riddle	NEW
10	**Screwdom** iKame	Puzzle	Physics	▲

Downloads Growth

				vs Previous
1	**SD Gundam G Generation ETERNAL** BANDAI NAMCO Entertainment	Strategy	Turn-Based Tactic	NEW
2	**Color Block Jam** Take-Two Interactive	Puzzle	Block	▲
3	**Chiikawa Pocket** CyberAgent	RPG	Idle RPG	NEW
4	**Screw Sort 3D - Pin Puzzle** Mindscaplay	Puzzle	Physics	▲ 58
5	**Who's next to you? 隣の席はだ** Tokyo Communications Group	Puzzle	Riddle	NEW
6	**Screwdom** iKame	Puzzle	Physics	▲
7	**Madoka Magica Magia Exedra** Sony Corporation	RPG	Turn-based RPG	NEW
8	**Car Jam** Shycheese	Puzzle	Sort	▲ 9
9	**Block Blast!** HungryStudio	Puzzle	Block	▲
10	**Archero 2** HABBY	Action	Shoot 'em Up	NEW

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SD Gundam G Generation ETERNAL

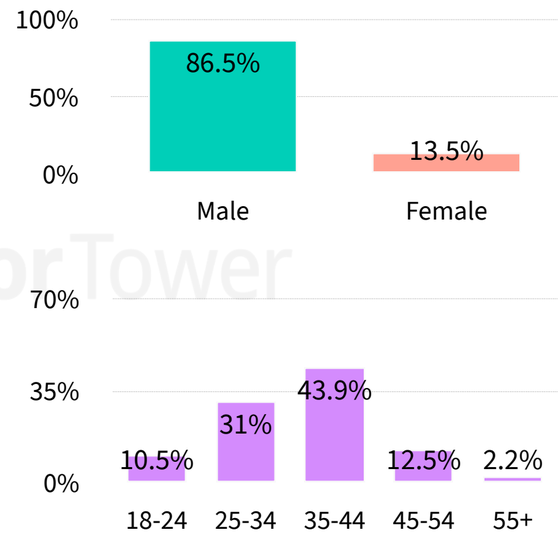
Bandai Namco Entertainment



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



SensorTower

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.

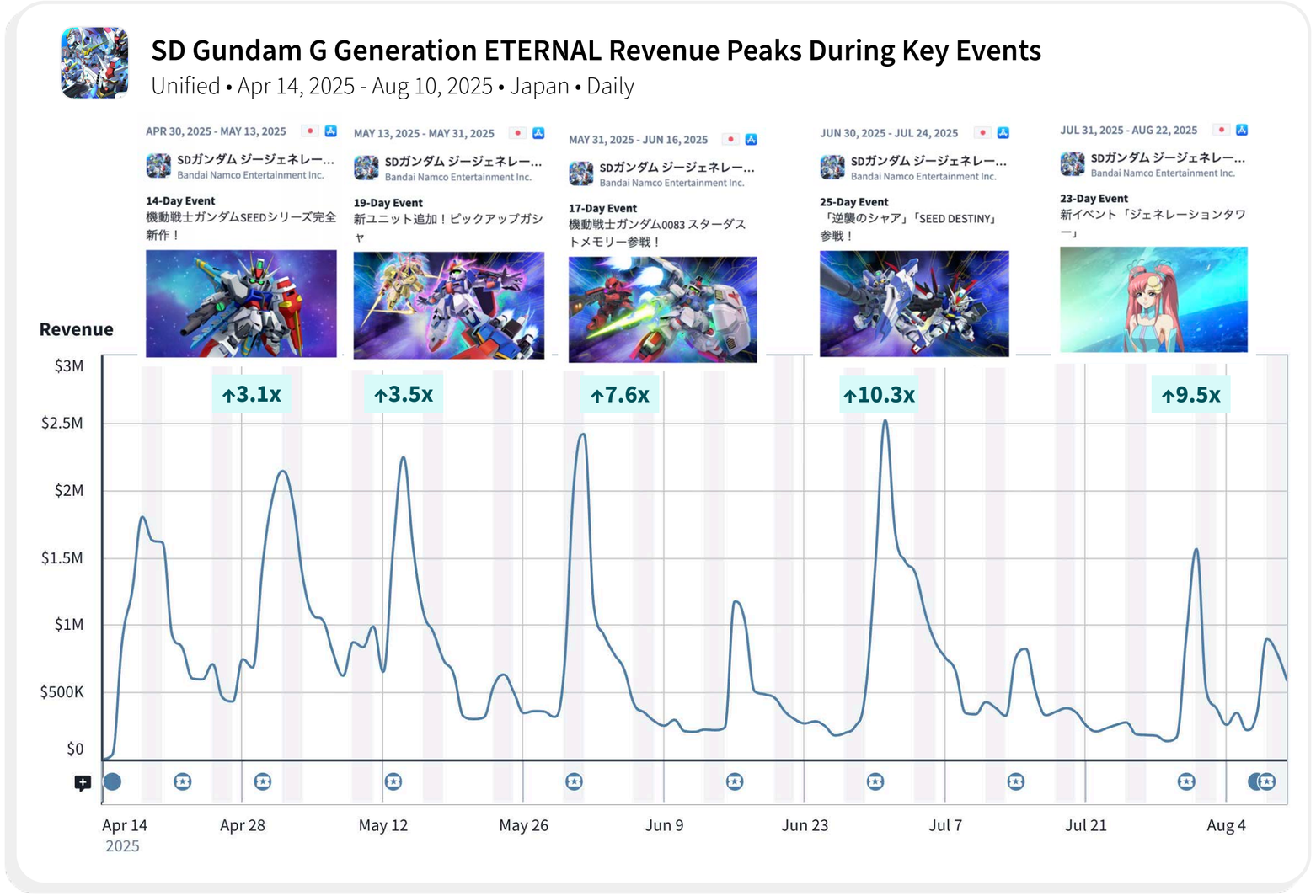
The game's audience skews overwhelmingly male (86.5%), with its core base in the 25–44 age range, especially 35–44 (43.9%). This aligns with Gundam's legacy fanbase, while its monetization through bundles, starter packs, and loot boxes sustains strong engagement. The mix of deep tactics and collectible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

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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.

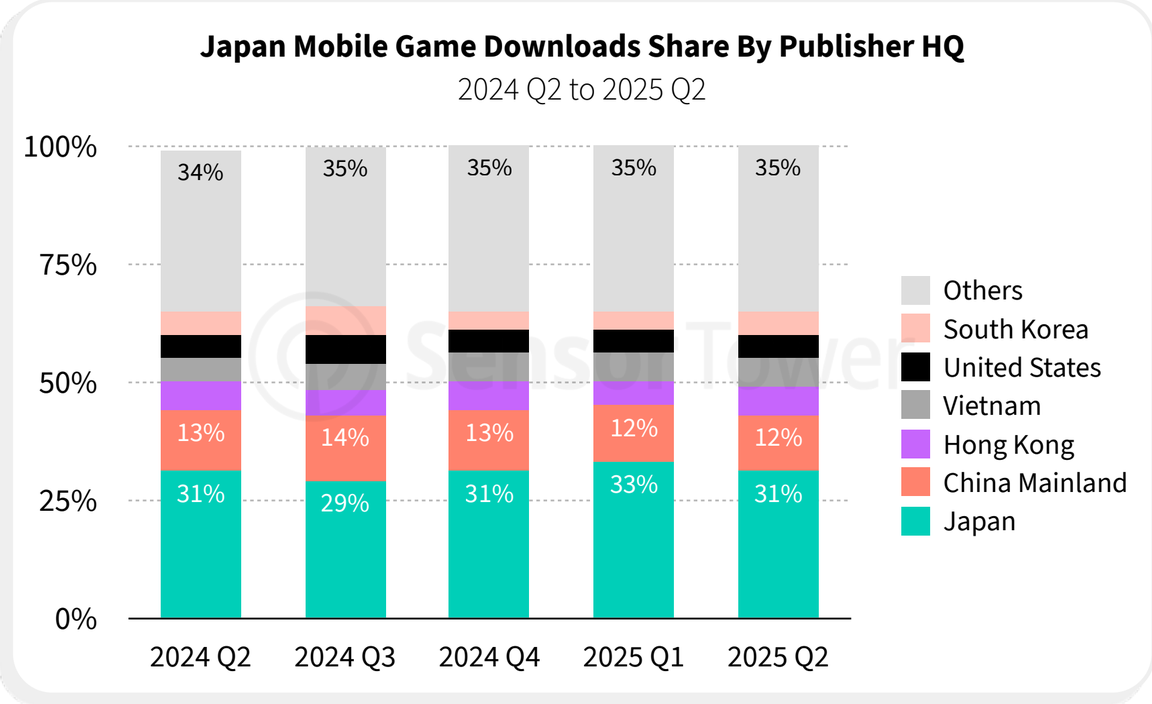


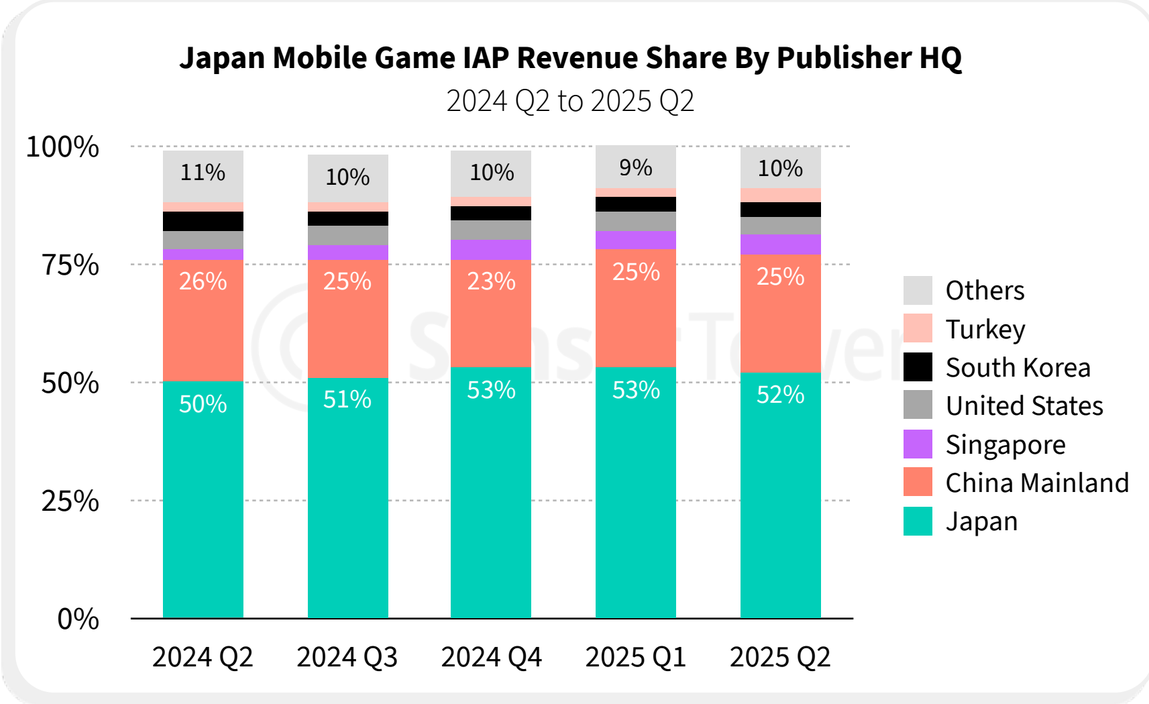
Data Source: Sensor Tower App Performance Insights as of September 1, 2025.
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Japan HQ'd Publishers Maintains Download Leadership While Expanding Revenue Share

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.





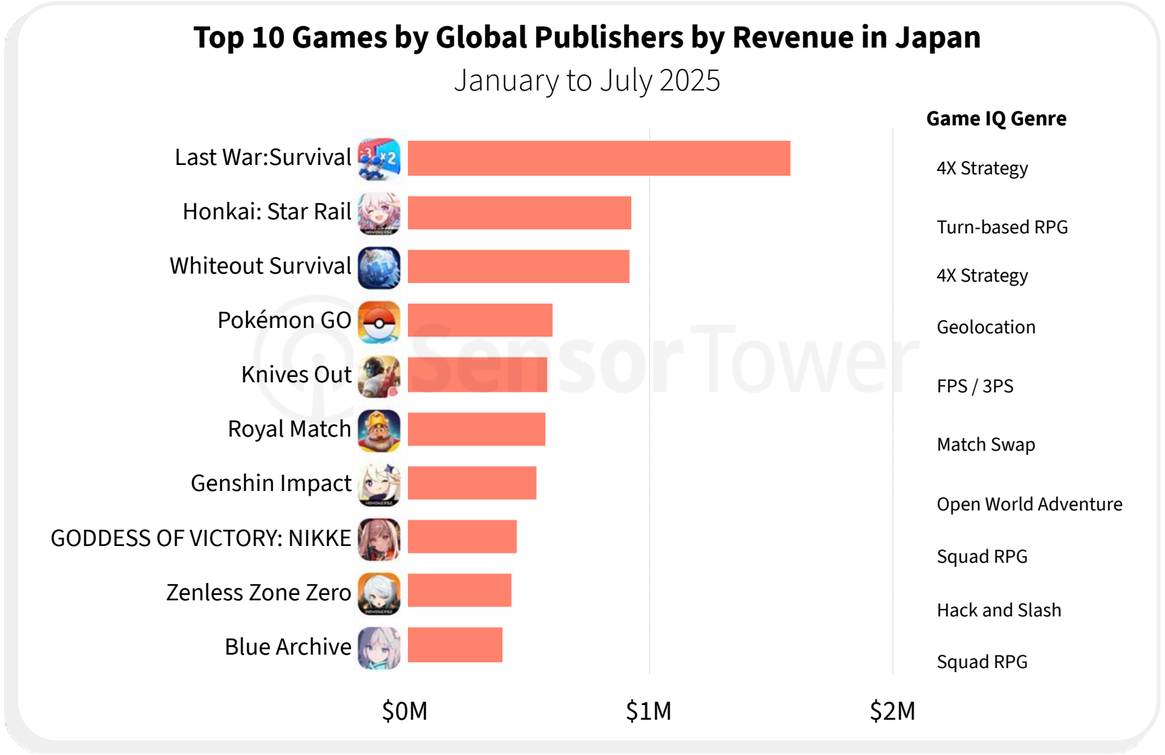
Japan HQ Publishers continues to lead domestic mobile game downloads, consistently holding around one-third of market share despite rising global competition. This highlights the strength of homegrown publishers in sustaining engagement across both core and casual gaming genres.

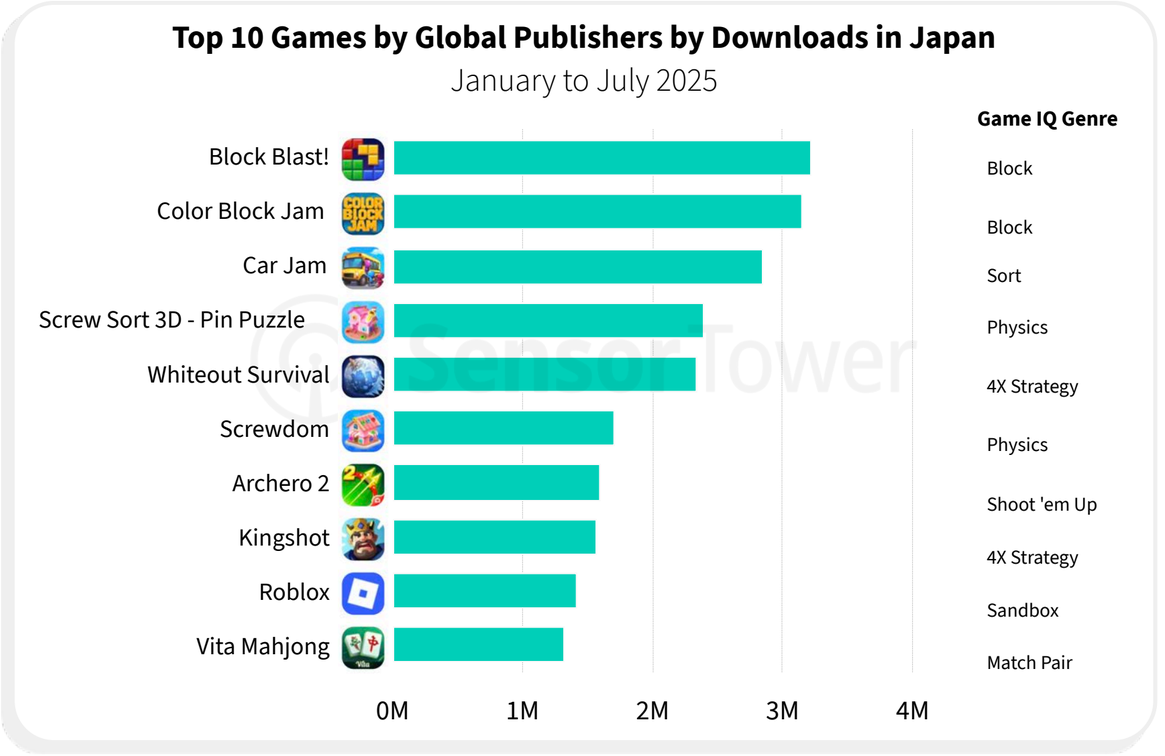
On the revenue side, Japan's dominance has grown even stronger. Local publishers now capture more than half of total IAP revenue, reflecting successful monetization models and loyal high-spending audiences that reinforce Japan's global leadership in mobile game profitability.

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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.





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.

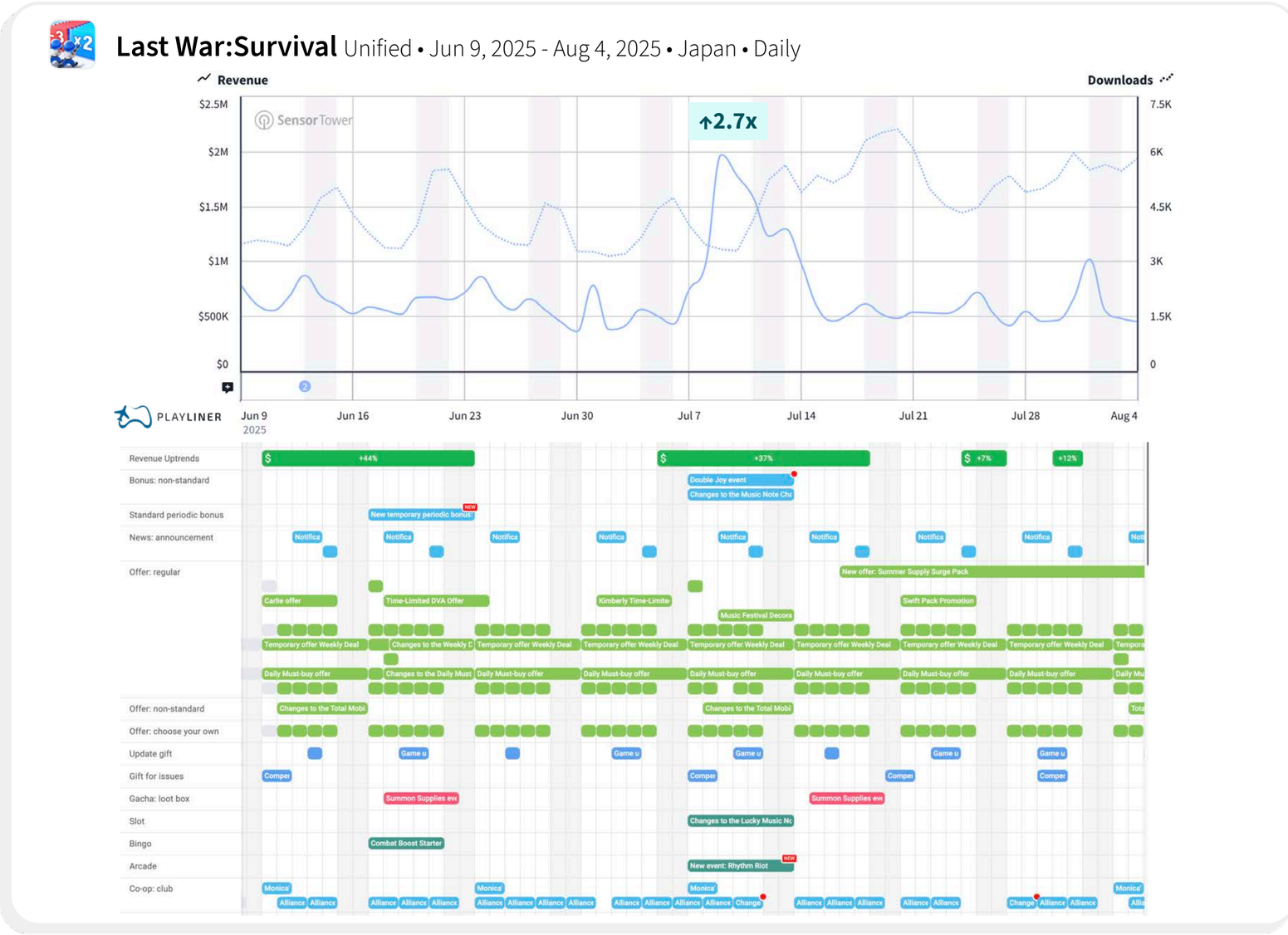
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Last War: Survival Boosts Revenue Through Aggressive Live Ops

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.

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.

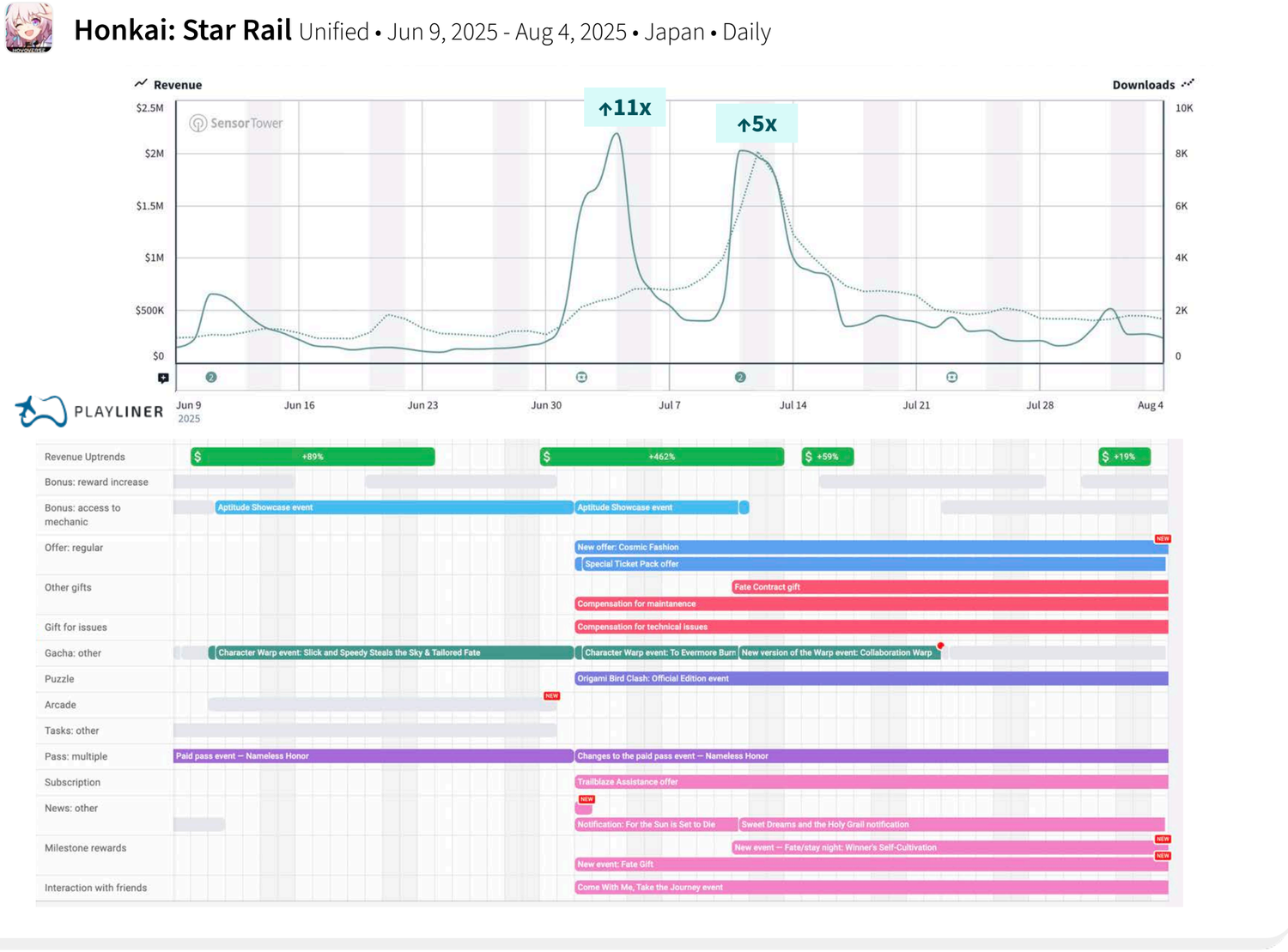
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Honkai: Star Rail Sees July Spike with Event-Driven Strategy

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.

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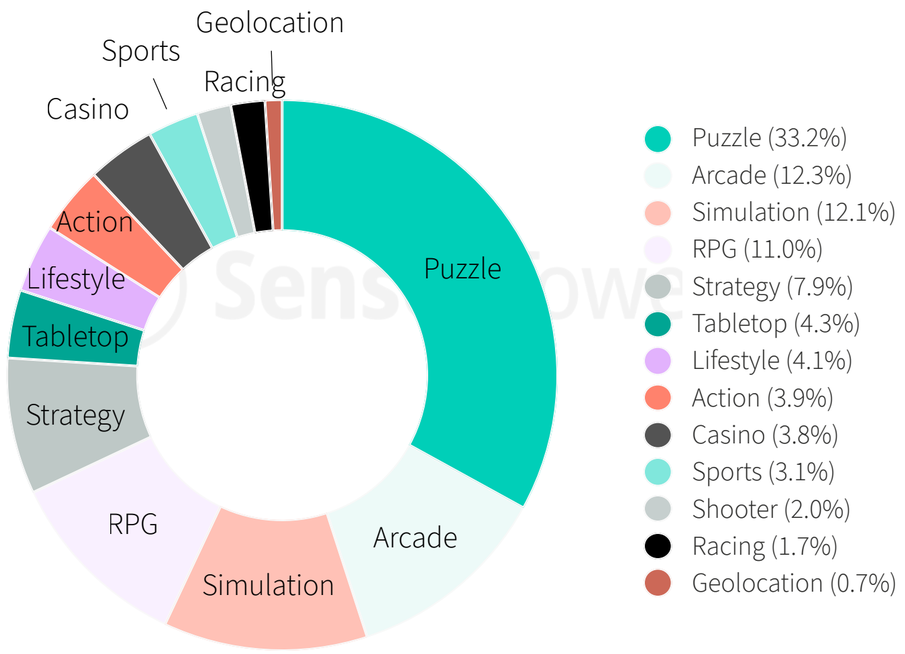
Japan Country Deep-Dive
Top Genres and Games

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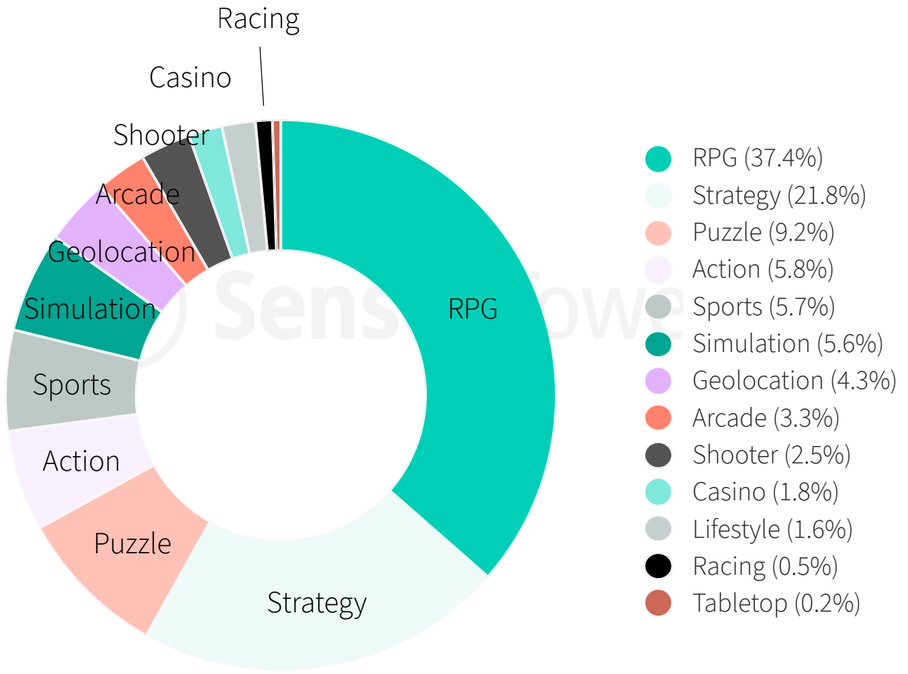
Japan's Mobile Game Market: Puzzle Dominates Downloads, RPGs Lead Revenue

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.

Japan Top Genre by Downloads 12 Months to July 2025



Japan Top Genre by Downloads 12 Months to July 2025



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.

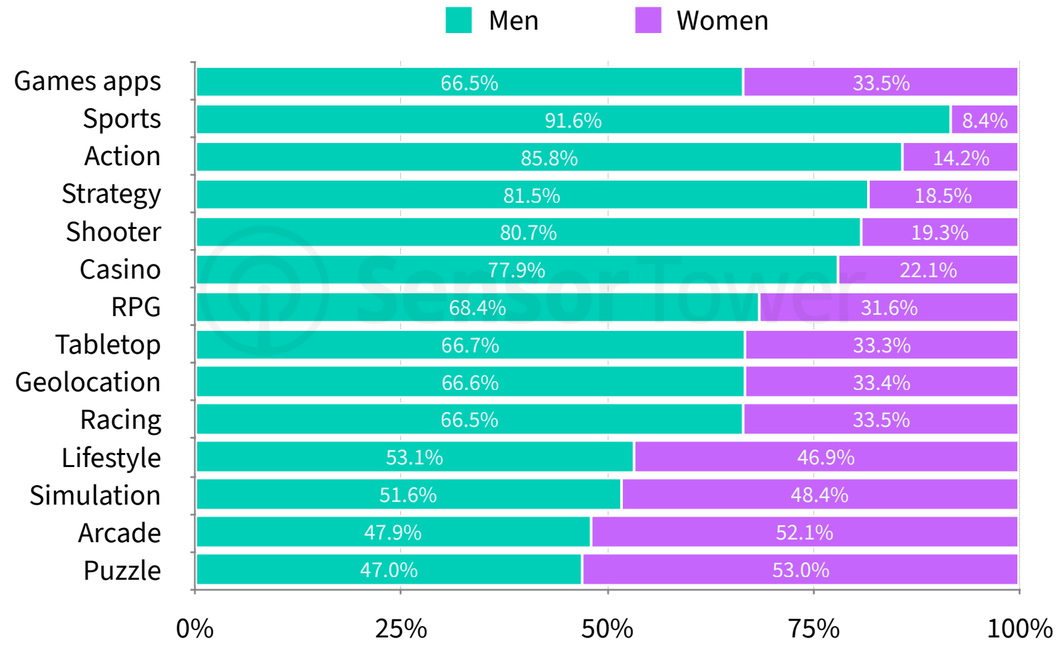
Revenue trends tell a different story—RPGs dominate with over one-third share, supported by Strategy titles at nearly 22%. Deep narrative content, gacha mechanics, and event-driven monetization ensure RPGs remain Japan's most profitable genre, balancing casual adoption with high-value core player spending.

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

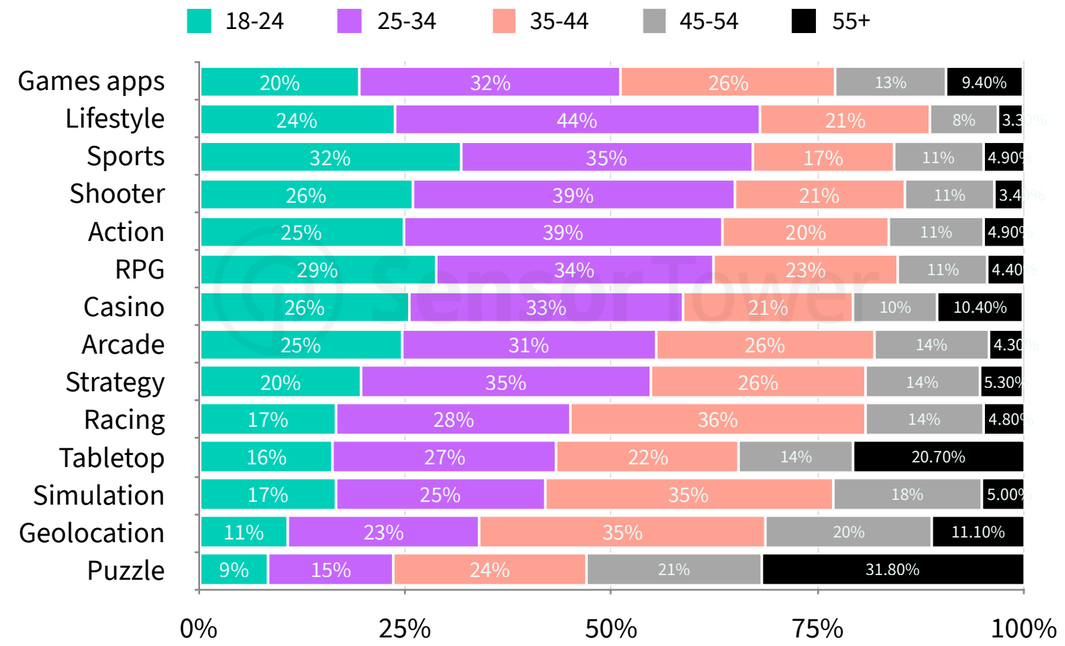
Data Source: Sensor Tower Audience Insights. Games classified by Sensor Tower's Game Taxonomy as of September 1, 2025.

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.

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

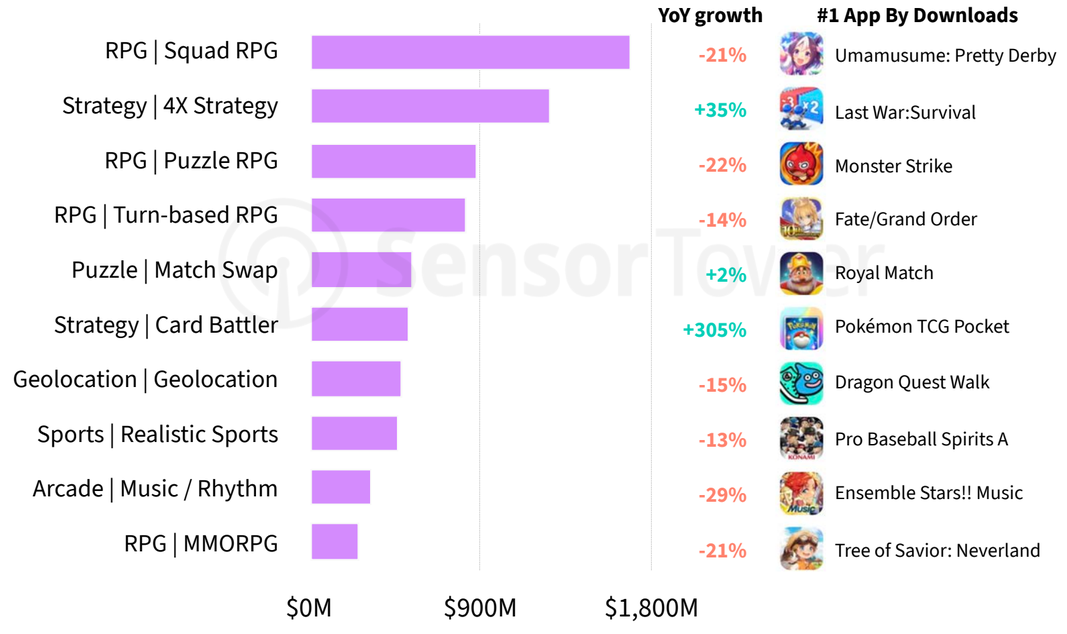
Data Source: Sensor Tower App Performance Insights as of September 1, 2025.
Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. Revenue is gross — inclusive of any percent taken by the app stores.

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 *Umamusume: 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.

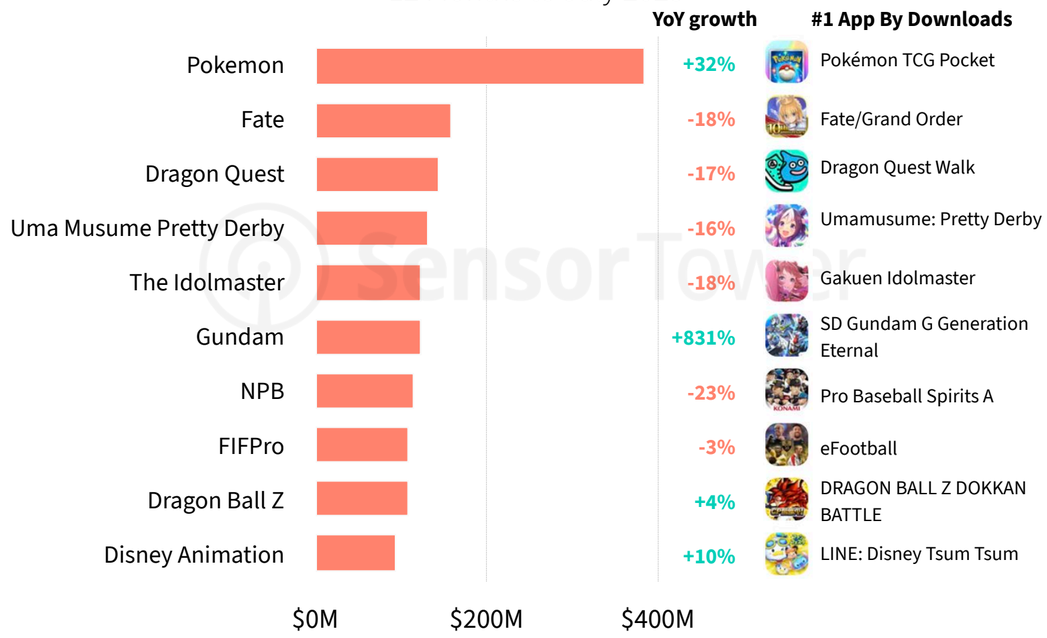
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Japan's IP-Based Mobile Games: Pokémon Leads, Gundam Emerges as Growth Driver

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.

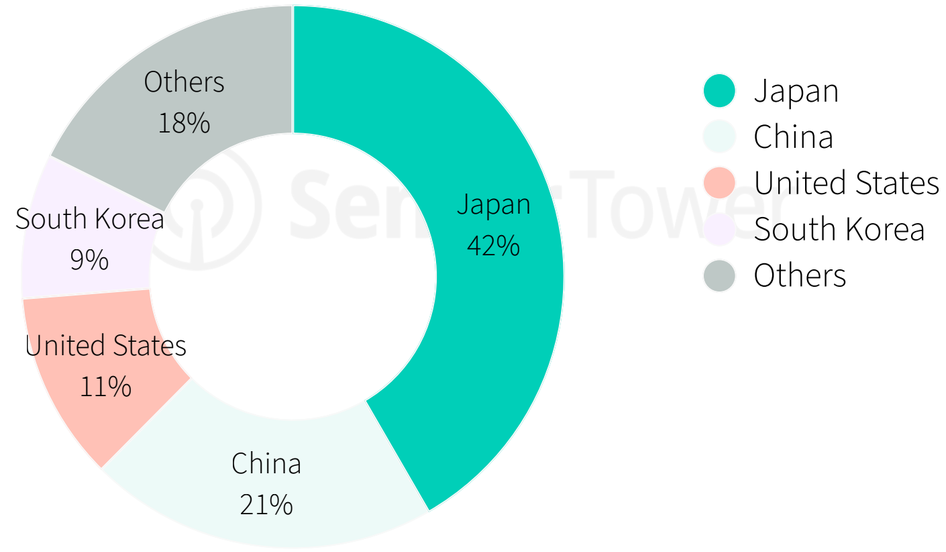
Growth momentum is shifting toward newer or revitalized IPs. *SD Gundam G Generation Eternal* surged with over 800% growth, while *Madoka Magica Magia Exedra* and *Persona: Nightfall Phantom* show strong debuts. This highlights Japan's ability to sustain evergreen IPs while fueling new franchise opportunities.

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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	Umamusume: 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 *Umamusume* remain anchors, while overseas hits like *Honkai: Star Rail* reinforce cross-market appeal.

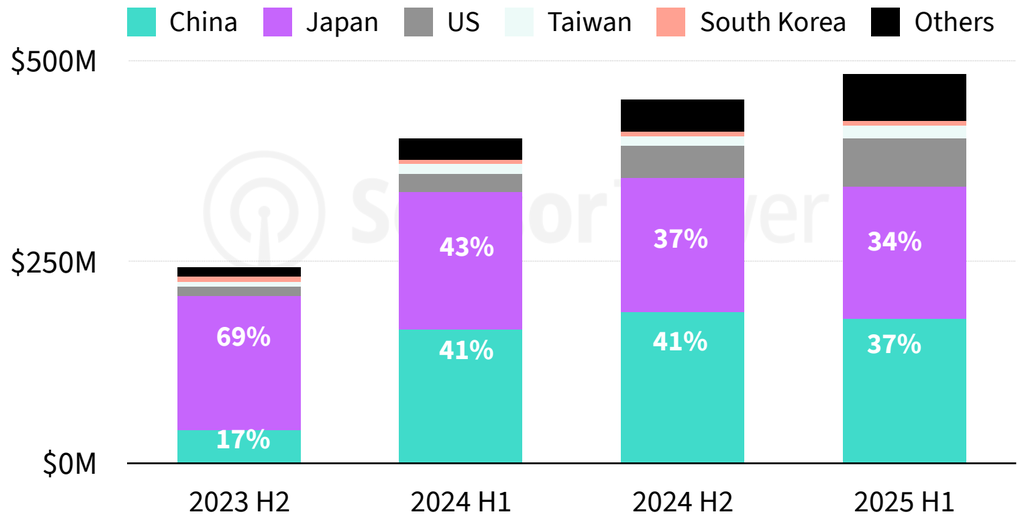
Growth momentum comes from revitalized and new IPs. *SD Gundam G Generation Eternal* tops revenue growth, joined by *Shadowverse: Worlds Beyond* and *Madoka Magica Magia Exedra*. This mix of enduring franchises and fresh adaptations highlights anime IP's sustained cultural and commercial power in Japan's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

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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 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

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.

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.

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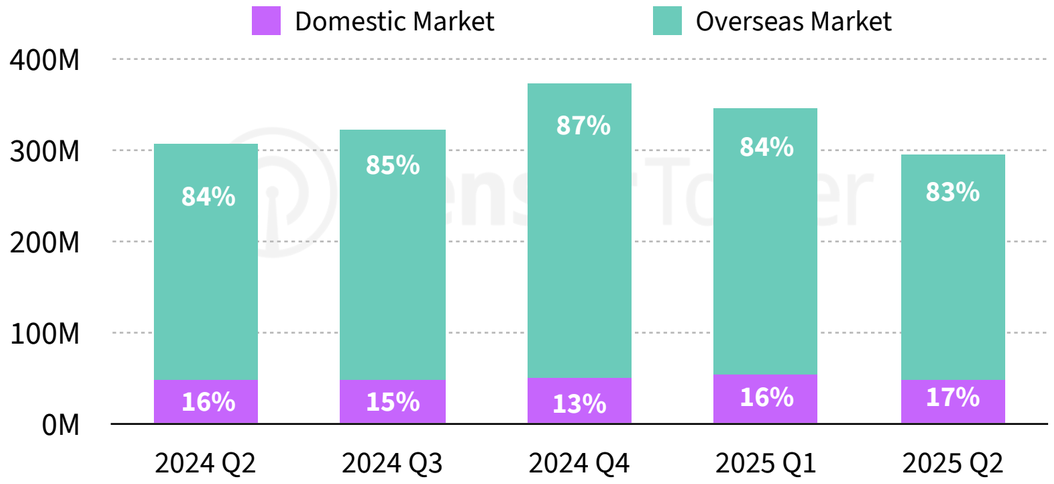
Japan Game Publishers
On the Global Stage

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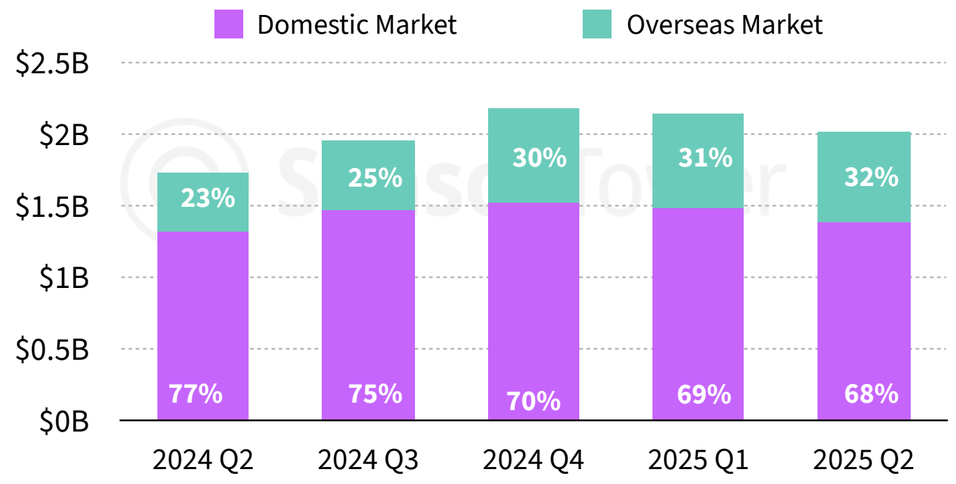
Japan-Based Publishers Maintain Domestic Strength While Tapping Overseas Revenue Growth

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.

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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

Downloads

		vs Previous
1	**KAYAC Inc.** Number Master: Run and merge	=
2	**SEGA CORPORATION** Sonic Dash: Fun Endless Runner	▲ 1
3	**The Pokémon Company** Pokémon TCG Pocket	▼ 1
4	**CyberAgent, Inc.** Arm Wrestling Master	=
5	**Konami** eFootball™	=
6	**BANDAI NAMCO Entertainment Inc.** DRAGON BALL LEGENDS	▲ 1
7	**Geisha Tokyo Entertainment, Inc.** Traffic Run!	▼ 1
8	**Tokyo Communications Group,Inc.** Order please! -Draw&Story game	▲ 1
9	**DWANGO Co., Ltd.** Sandwich Runner	▼ 1
10	**Nintendo Co., Ltd.** Mario Kart Tour	▲ 1

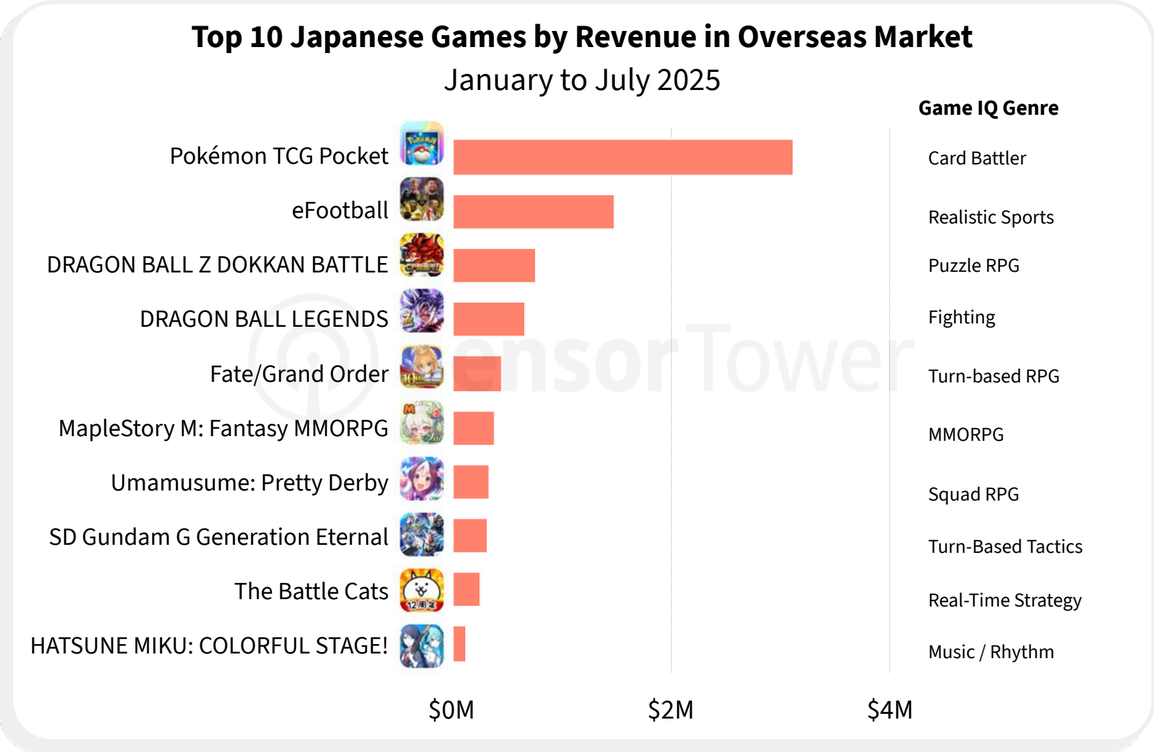
Revenue

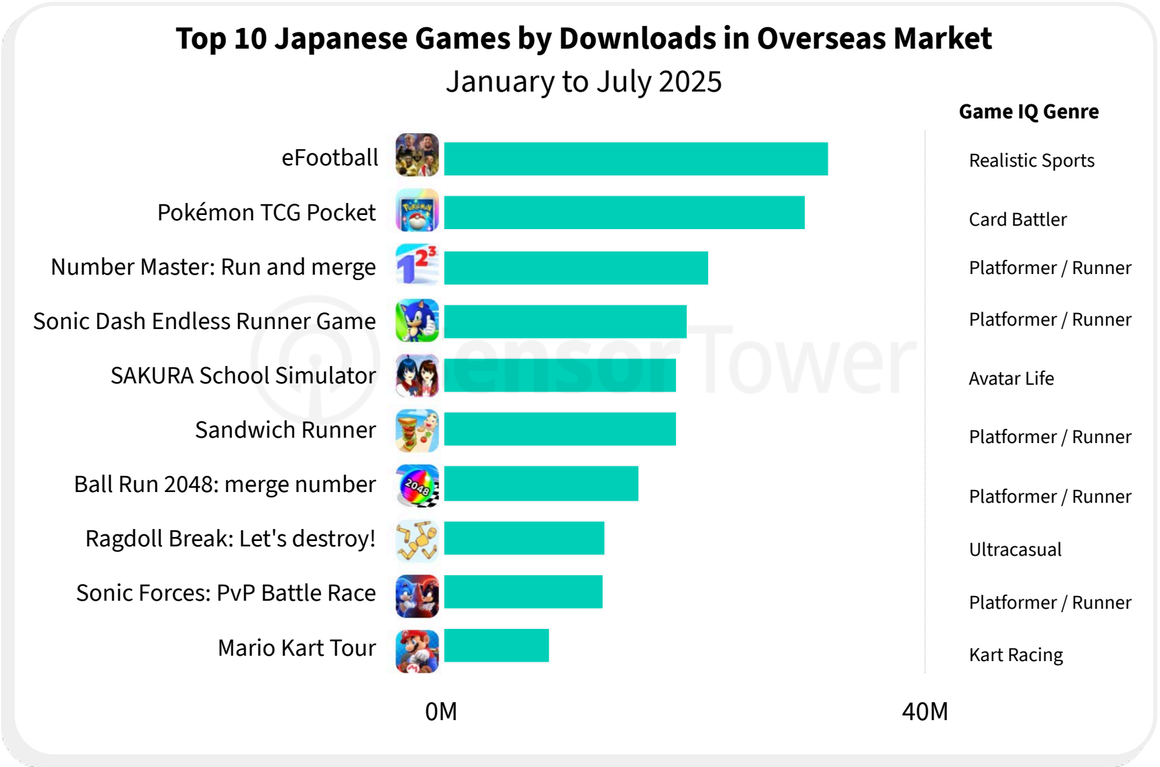
		vs Previous
1	**BANDAI NAMCO Entertainment Inc.** DRAGON BALL Z DOKKAN BATTLE	=
2	**The Pokémon Company** Pokémon TCG Pocket	▲ 1
3	**Konami** eFootball™	▼ 1
4	**CyberAgent, Inc.** Umamusume: Pretty Derby	▲ 3
5	**Sony Corporation** Fate/Grand Order	=
6	**SQUARE ENIX INC** Dragon Quest Walk	▼ 1
7	**mixi, Inc** Monster Strike	▼ 4
8	**NAVER Corporation** LINE: Disney Tsum Tsum	▲ 1
9	**GungHo Online Entertainment, Inc.** Puzzle & Dragons (English)	▼ 1
10	**SEGA CORPORATION** HATSUNE MIKU: COLORFUL STAGE!	=

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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.





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 ultracasual 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.

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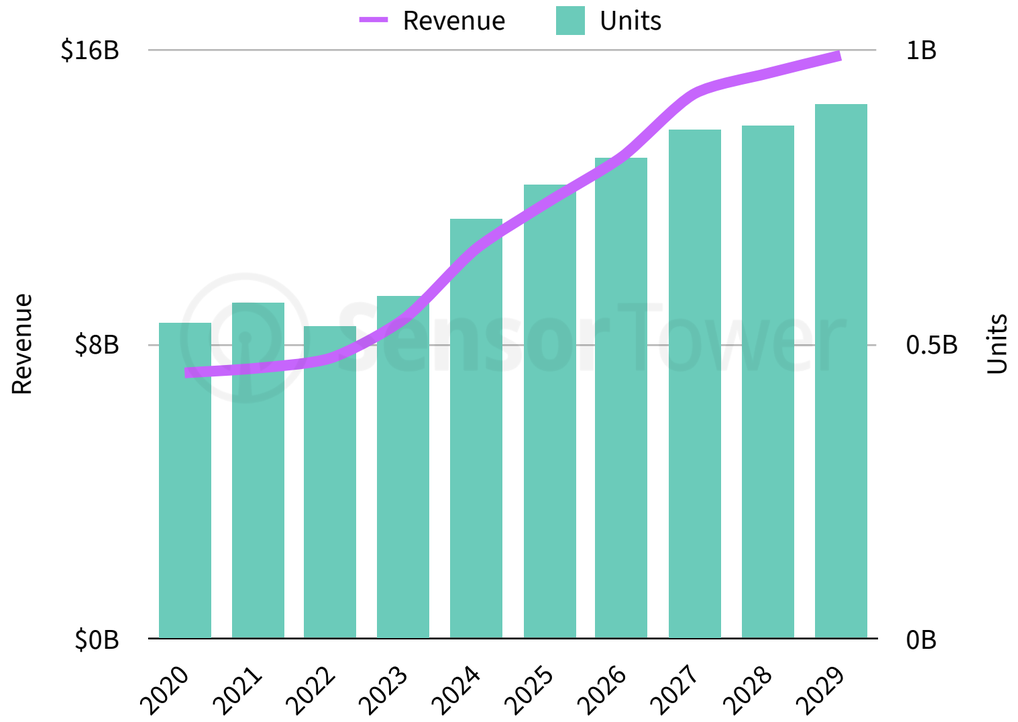
Japan Stronghold in PC/Console Games

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Steam Growth Continues as Japan Strengthens PC/Console Game Presence

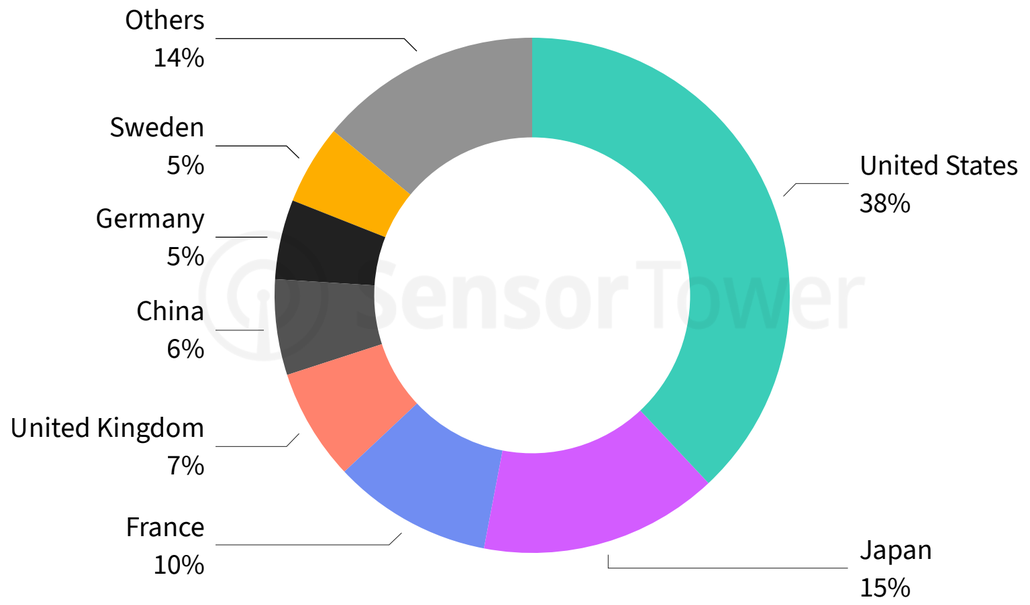
Data Source: Sensor Tower Video Game Insights as of August 22nd, 2025
Note: Steam's platform game sales revenue does not include in-game purchase revenue. The sales revenue, unit sales, active users, and cumulative users for the years 2025-2029 are all estimated figures.

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.

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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

All HQ Publishers

Rank	Publisher	Class	HQ	#Released Games
1	Electronic Arts	AAA	United States	168
2	Ubisoft	AAA	France	180
3	Bandai Namco	AAA	Japan	148
4	2K	AAA	United States	105
5	Bethesda Softworks	AAA	United States	69
6	SEGA	AAA	Japan	173
7	Valve	AAA	United States	40
8	Capcom	AAA	Japan	98
9	Xbox Game Studios	AAA	United States	61
10	Feral Interactive	AA	United Kingdom	44

Japan HQ Publishers

Rank	Publisher	Class	#Released Games
1	Bandai Namco	AAA	148
2	SEGA	AAA	173
3	Capcom	AAA	98
4	FromSoftware	AAA	7
5	Square Enix	AAA	162
6	Pocketpair	Indie	5
7	KONAMI	AA	48
8	ARC SYSTEM WORKS	Indie	48
9	PLAYISM	Indie	122
10	SNK CORPORATION	Indie	31

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.

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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** NetEase Games	**Shooter** Hero Shooter
2	**EA SPORTS FC 25** Electronic Arts	**Sports** Simulation Sports
3	**Monster Hunter Wilds** Capcom	**RPG** Action RPG
4	**Clair Obscur: Expedition 33** Kepler Interactive	**RPG** Turn-Based RPG
5	**NBA 2K25** 2K	**Sports** Simulation Sports
6	**R.E.P.O.** semiwork	**Action** Survival Horror
7	**UFC 5** Electronic Arts	**Sports** Simulation Sports
8	**Split Fiction** Electronic Arts	**Action** Action-Adventure
9	**PEAK** Aggro Crab, Landfall	**Action** Survival Craft
10	**The Elder Scrolls IV: Oblivion Remastered** Bethesda Softworks	**RPG** Action RPG

Top games by Japan HQ Publishers

1	**Monster Hunter Wilds** Capcom	**RPG** Action RPG
2	**ELDEN RING NIGHTREIGN** Bandai Namco, FromSoftware	**Shooter** Hero Shooter
3	**ELDEN RING** Bandai Namco, FromSoftware	**RPG** Action RPG
4	**Resident Evil 4** Capcom	**Action** Survival Horror
5	**Sonic Colors: Ultimate** SEGA	**Arcade** Platformer
6	**FINAL FANTASY VII REBIRTH** Square Enix	**RPG** Action RPG
7	**Sonic Frontiers** SEGA	**Arcade** Platformer
8	**PAC-MAN WORLD Re-PAC** Bandai Namco	**Arcade** Platformer
9	**PowerWash Simulator** Square Enix	**Simulation** Job Simulator
10	**DRAGON BALL XENOVERSE 2** Bandai Namco	**Action** Fighting

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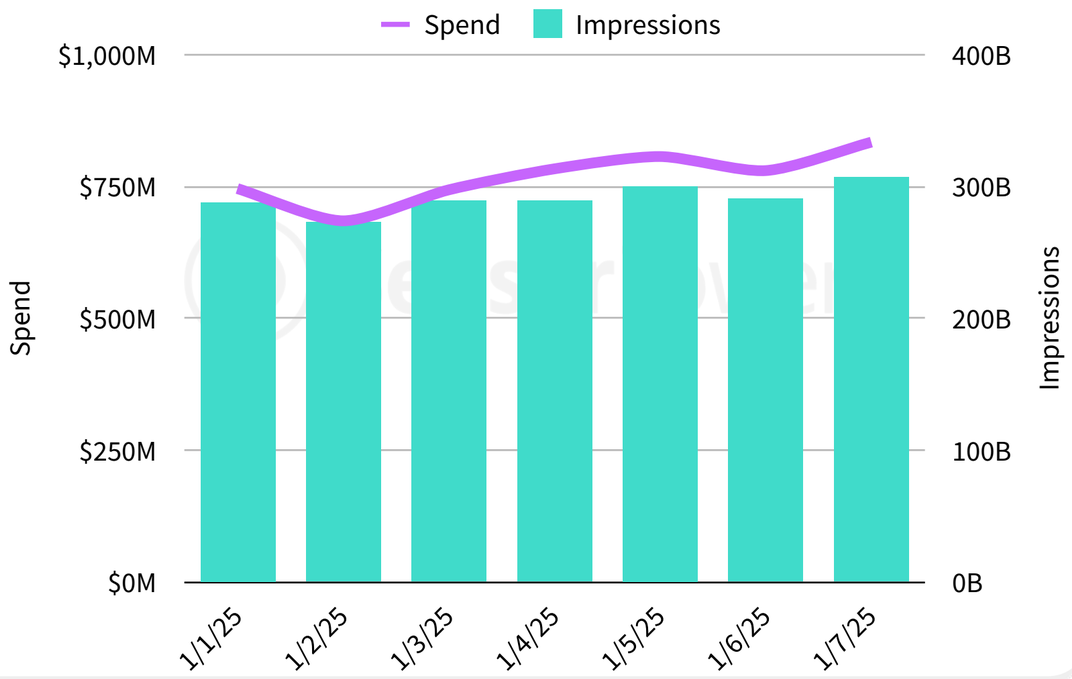
Japan Game Advertising
Overview

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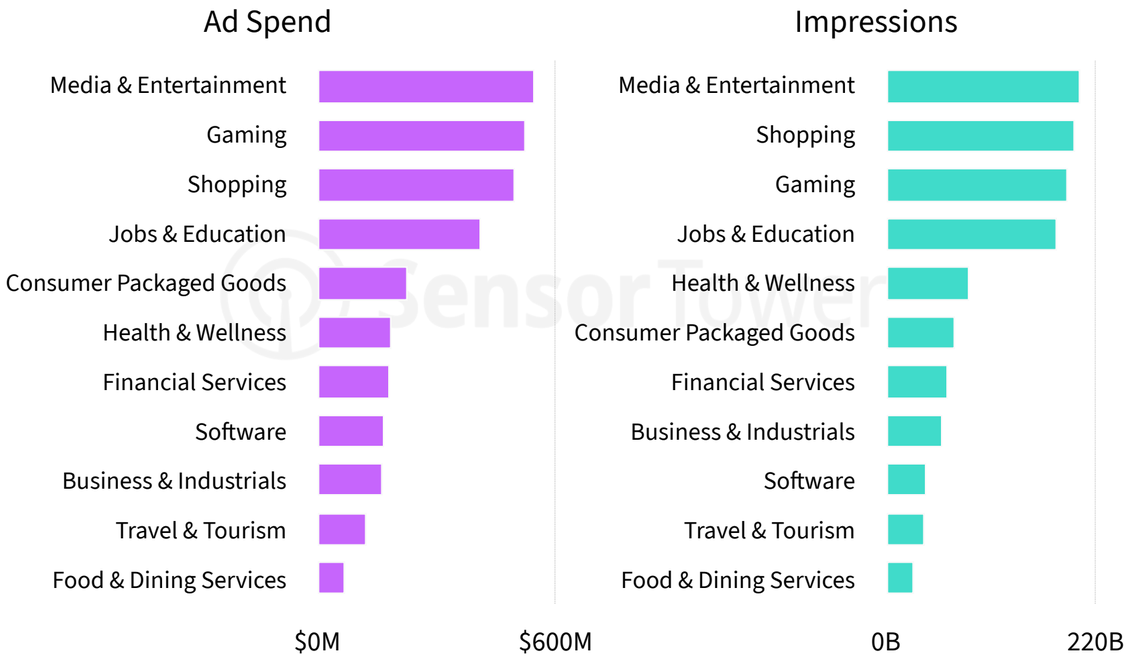
Gaming Emerges as a Core Growth Driver in Japan's Digital Advertising

Source: Sensor Tower – Advertising Insights by Pathmatics
Note: This report includes data from Facebook, Instragram, 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 Top Categories by Digital Ad Spend and Impression 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.

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.

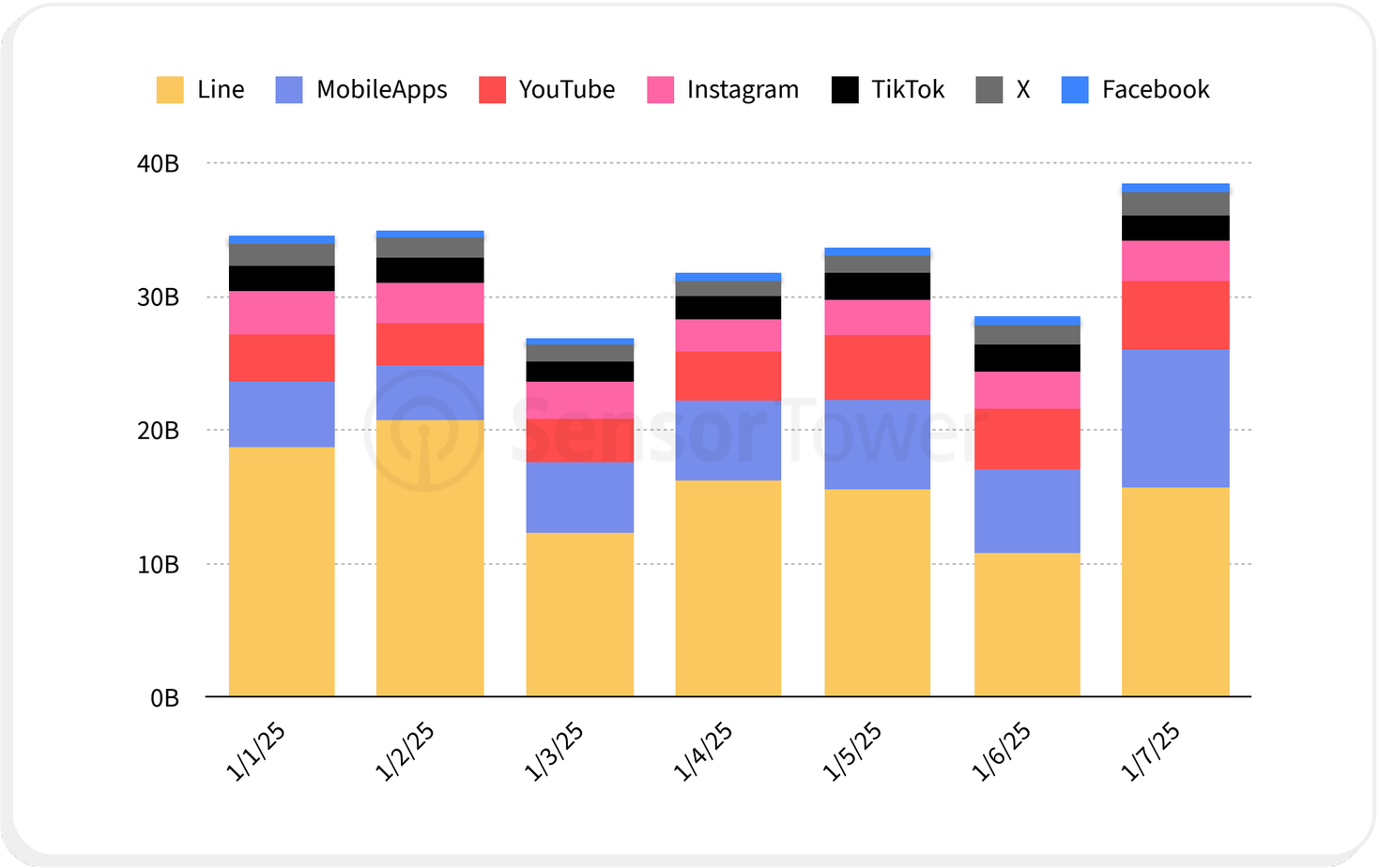
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Japan Gaming Advertising Remains LINE-Centric with Broad Channel Support in H1 2025

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



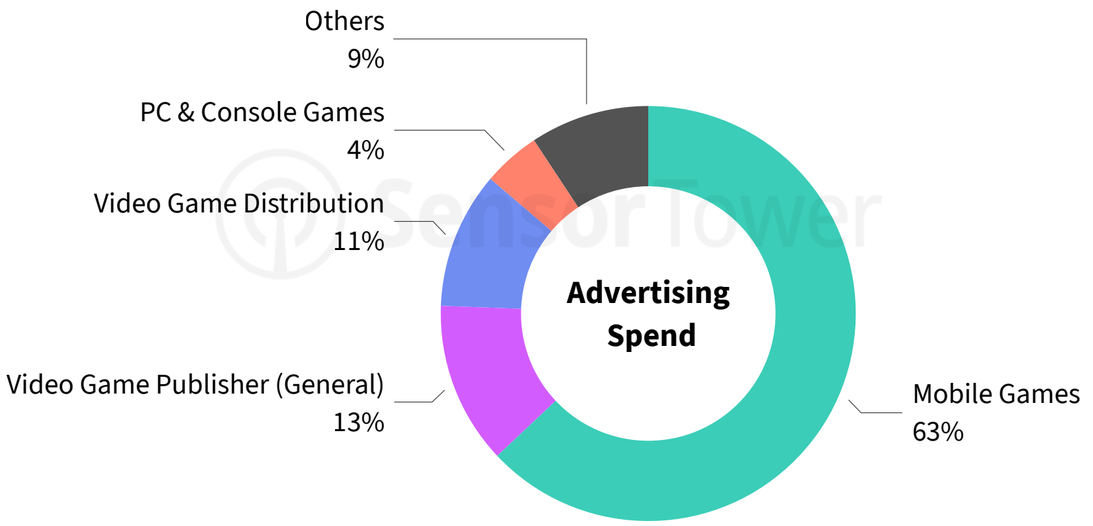
Source: Sensor Tower – Advertising Insights by Pathmatics
Note: This report includes data from Facebook, Instragram, LINE (from April 2025), Mobile App Ad Networks, TikTok, X, and YouTube, covering the period from January to July 2025.

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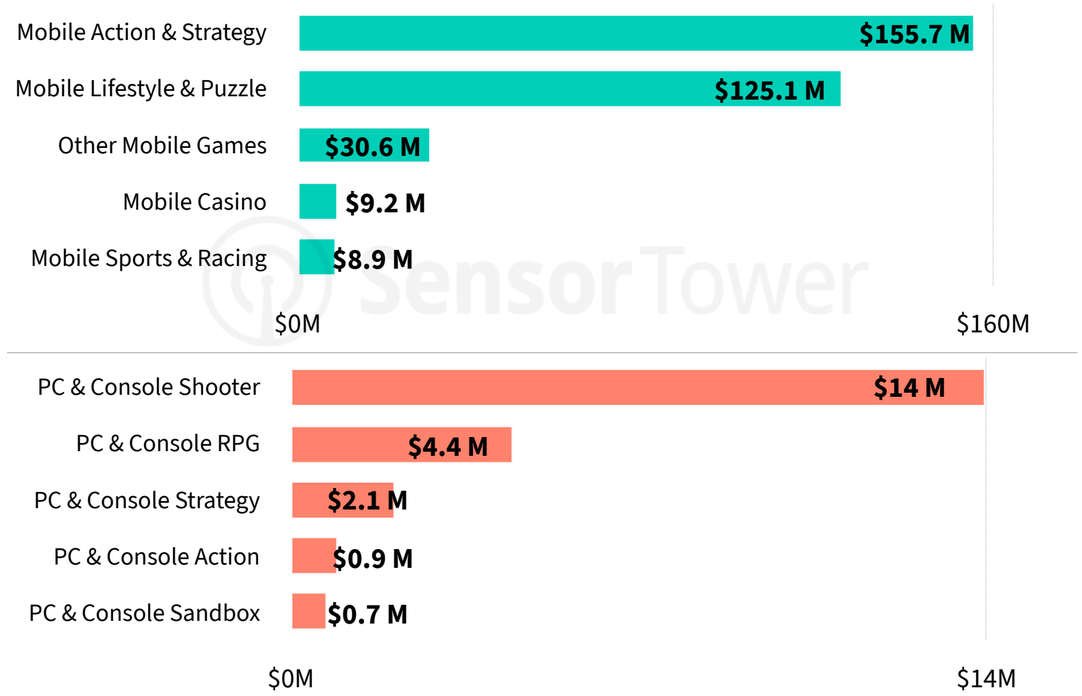
Action & Strategy Dominate Japan's Mobile Gaming Ad Spend, While Shooters Lead PC & Console Genre Investment

Source: Sensor Tower – Advertising Insights by Pathmatics
Note: This report includes data from Facebook, Instragram, 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, PC & Console Gaming Top Sub Genres by 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.

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.

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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, Instragram, 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** The Battle Cats
2		**Century Games** Whiteout Survival
3		**Joy Net Games** Legend of the Holy Spirit
4		**Last War: Survival Game (FUNFLY** Last War:Survival
5		**Tencent** Brawl Stars
6		**Habby PTE. LTD.** Archero 2
7		**The Pokémon Company** Pokémon TCG Pocket
8		**miHoYo Co., Ltd.** Honkai Impact 3rd
9		**37GAMES** Puzzles & Survival
10		**Sony Interactive Entertainment** Madoka Magica Magia Exedra

Mobile Lifestyle & Puzzle

1		**Niantic, Inc.** Pokémon GO
2		**HuuugeGames (Huuuge Global** Car Jam
3		**Dream Games** Royal Match
4		**Cocone Global** Livly Island - Adopt Cute Pets
5		**Take-Two Interactive Software,** Color Block Jam
6		**Whoyaho Corp.** Tanghulu Master - Mukbang ASMR
7		**Universal Mobile Games** Daily Merge: Match Puzzle Game
8		**Supercent, Inc.** Snake Clash!
9		**Square Enix Holdings Co., Ltd** Dragon Quest Walk
10		**Bandai Namco Group** Gakuen Idolmaster

PC & Console Shooter

1		**Tencent** Delta Force
2		**Wargaming.net** World of Warships Blitz War
3		**Epic Games, Inc.** Fortnite (PC/Console)
4		**Microsoft** Overwatch (Franchise)
5		**Splitgate (1047 Games, LLC)** Splitgate (1047 Games, LLC)
6		**Wildlife Studios** War Machines：Tanks Battle Game
7		**MY.GAMES** War Robots Multiplayer Battles
8		**Seasun Games** Mecha BREAK
9		**Gaijin Entertainment Corporation** War Thunder Mobile
10		**Bandai Namco Group** ONE PIECE Bounty Rush

PC & Console RPG

1		**Nexters (GDEV Inc.)** Hero Wars: Alliance
2		**SEGA Corporation** Persona5: The Phantom X
3		**Stillfront Group AB** Albion Online
4		**Capcom Entertainment, Inc.** Monster Hunter Wilds
5		**miHoYo Co., Ltd.** Honkai: Star Rail
6		**Square Enix Holdings Co., Ltd.** Final Fantasy XIV
7		**HaoPlay Limited** GIRLS' FRONTLINE 2: EXILIUM
8		**Nintendo** Xenoblade Chronicles X
9		**Netmarble Corporation** Solo Leveling:Arise
10		**Embracer Group AB** Kingdom Come (Franchise)

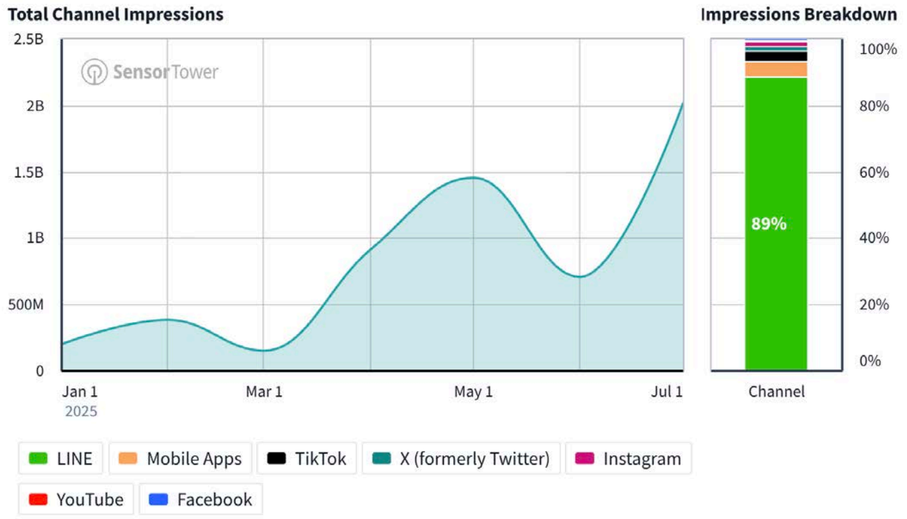
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PONOS Corporation
The Battle Cats

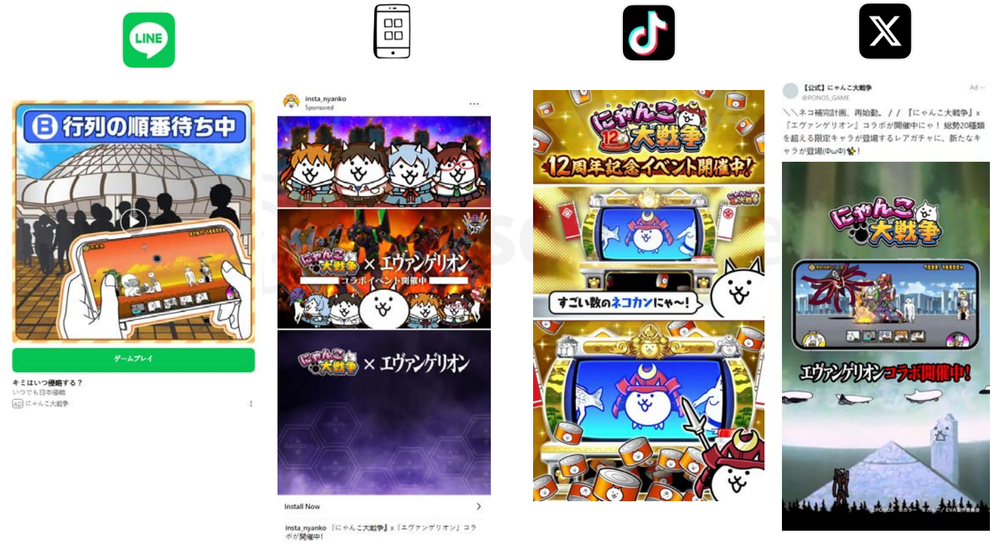
The Battle Cats, developed by PONOS Corporation, continues to be one of Japan's most iconic and enduring mobile titles. Known for its quirky art style and humorous gameplay, the game has sustained strong popularity through frequent collaborations and creative ad campaigns.

Source: Sensor Tower – Advertising Insights by Pathmatics
Note: This report includes data from Facebook, Instragram, 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.

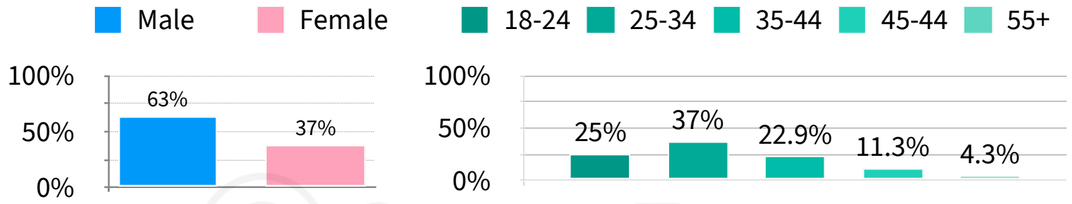
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Century Games
Whiteout Survival

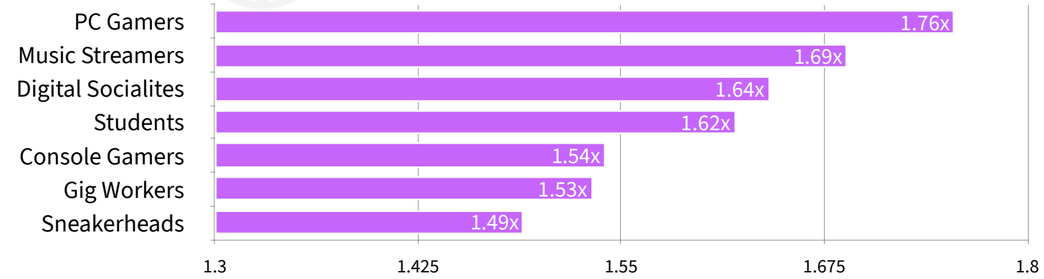
Whiteout Survival from Century Games has quickly built a strong following in Japan. With immersive survival themes and high-quality creatives, the title appeals to a wide spectrum of players while leaning heavily on TikTok and Instagram for visibility.

Source: Sensor Tower – Advertising Insights by Pathmatics
Note: This report includes data from Facebook, Instragram, 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

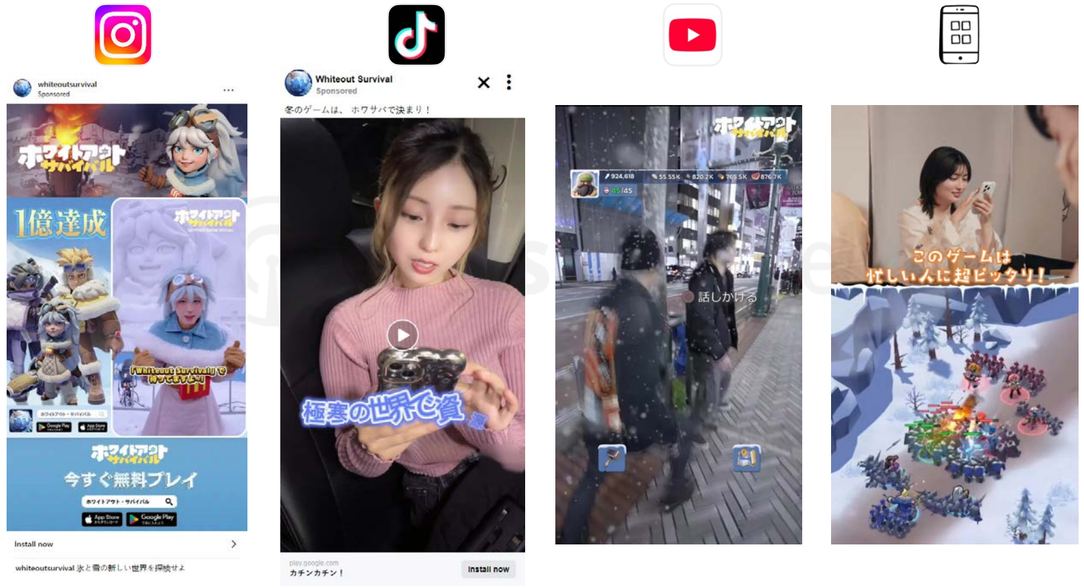


Century Games Audience vs. General Population % Difference



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.

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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

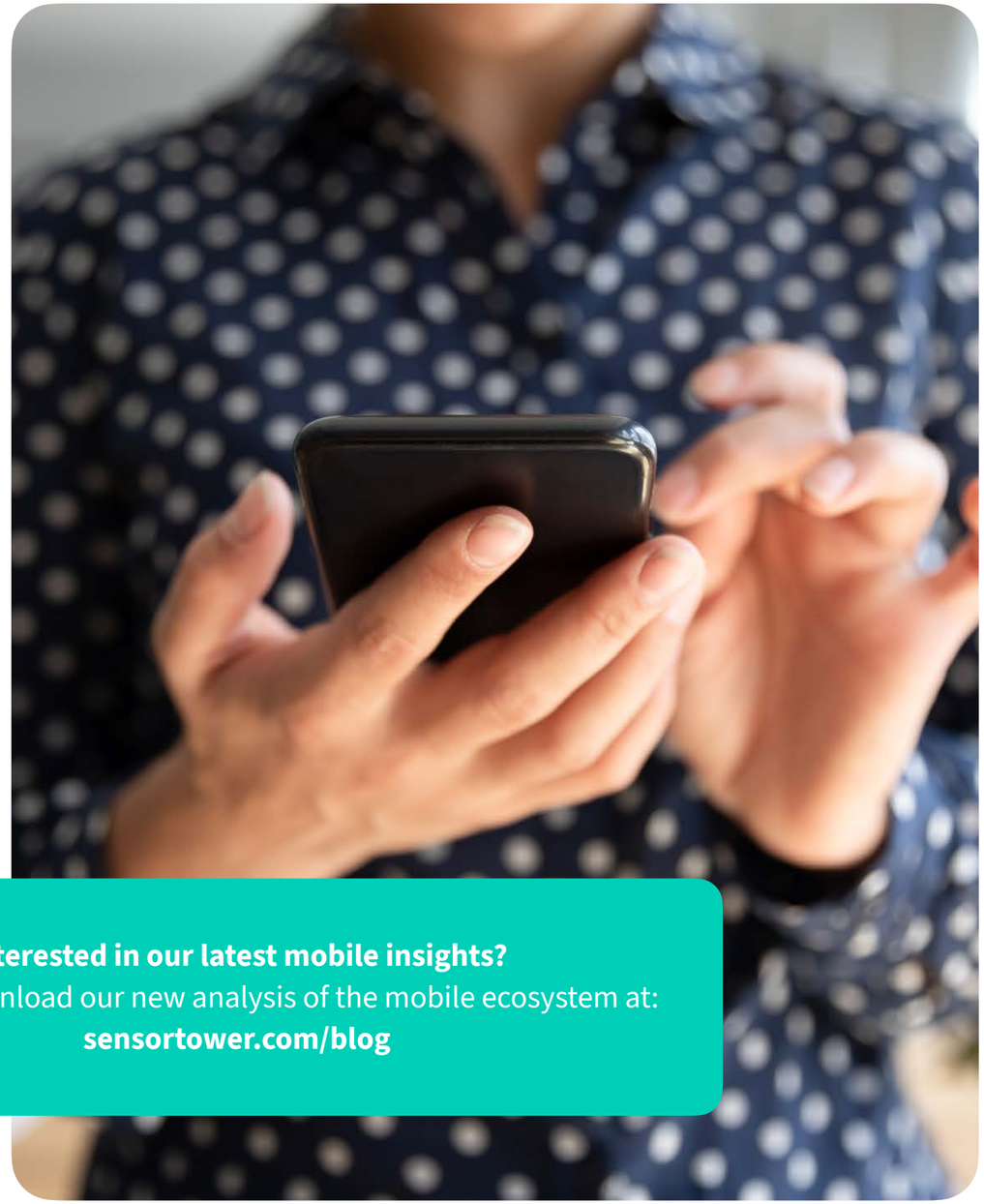
Gaming is now one of Japan's leading digital ad categories, with LINE and Mobile Apps driving the majority of exposure. Case studies like *The Battle Cats* and *Whiteout Survival* demonstrate how cross-IP collaborations, seasonal campaigns, and culturally resonant creatives re-energize audiences, underscoring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

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Sensor Tower
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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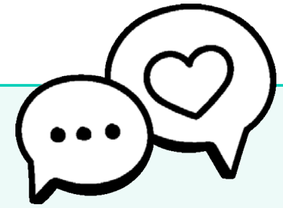
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