



80LV

FROM SAMURAI TO SUPER MARIO: JAPANESE GAMERS RESEARCH

April 2023

FROM SAMURAI TO SUPER MARIO: JAPANESE GAMERS RESEARCH

As a global leader in the gaming industry, Japan has been instrumental in the development of popular gaming franchises, such as Super Mario, Pokemon, and Final Fantasy, among many others. Through this research, we will analyze the factors that have led to the success of the Japanese gaming industry, including the cultural, economic, and technological factors that have shaped the industry. We will also explore the preferences and habits of Japanese gamers, including their payment methods, hardware preferences, and the types of games that are most popular among Japanese gamers.

Moreover, we will delve into the motivations that feed the passion of Japanese gamers. **This research will provide valuable insights for game developers, marketers, and industry stakeholders looking to enter the Japanese gaming market.**

RISING TO THE TOP: JAPAN'S ECONOMY AND MARKET

3

DEMOGRAPHICS IN THE GAMING SCENE

4

THE PRICE OF FUN: PAYMENT HABITS

5

MARKETING MAGIC: UNLOCKING FACTORS TRIGGERING SALES

10

HARDWARE HEAVEN: POPULAR GAMING DEVICES

12

EXPLORING THE MOST POPULAR GAMES' ATTRIBUTES

14

THE JOYS AND DRIVERS OF BEING A GAMER

17

CONCLUSION AND TOP CHARACTERISTICS

21

RISING TO THE TOP: JAPAN'S ECONOMY AND MARKET

The economy of Japan is one of the most powerful in the world. It has a GDP that ranks the third highest worldwide, and its population stands at 126 million people. The country is considered to be wealthy, with high levels of income equality and low unemployment rates. Japan also has an incredibly strong gaming market which continues to grow each year.

Revenue in the Video Games segment is projected to reach \$72 billion USD in 2023 (with an annual growth rate of 7.17%). The average revenue per user (ARPU) in the Video Games segment is projected to amount to \$956.8 USD in 2023. The largest segment is Mobile Games with a market volume of \$65.63 billion USD in 2023 – making it one of the largest markets globally when considering both console hardware sales and digital content revenue combined together.

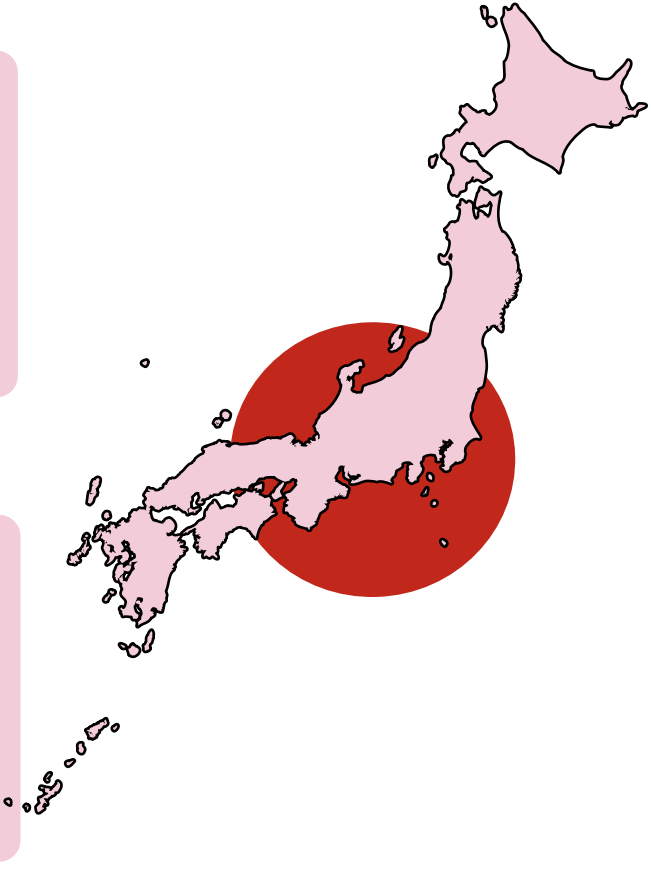
Economy of Japan

Country group
Developed/High-income economy

Population	GDP
124,214,766	\$4.3 trillion (nominal)
Inflation (CPI)	\$6.1 trillion (PPP)
-0.1%	

Video Games Sector

Revenue	Annual Growth Rate
US\$956.80	7.17%
Revenue/user (ARPU)	Mobile games Market volume
US\$956.80	US \$65.63 bn



Japan's robust economy makes it one of the best places in the world for individuals looking to invest in new businesses or take part in existing ones such as the video game industry. With its prosperous GDP, high-quality infrastructure network, and thriving entertainment sector – there's no doubt that investing in Japanese markets can potentially yield great returns over time if done correctly.

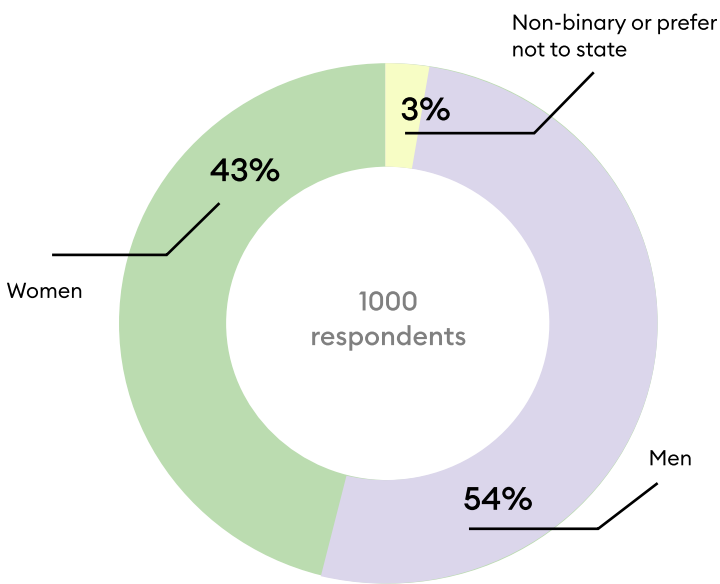
And now, let's have a look at the gamers community: what are they like?

DEMOGRAPHICS IN THE GAMING SCENE

Among the 1,000 questioned Japanese gamers we encountered, 54% were male gamers, 43% were women, 1% were non-binary people, and 2% preferred not to state their gender in the questionnaire. The respondents of this research fall between the age of 18 and 77 years old, with an average age of 36 and a median of 34 years.

Looking at the income of Japanese gamers, we see that most gamers have an income of 300,000–544,999 JPY (\$2,300–\$4,200 USD) per month. It will be more interesting to look at how income influences gaming behavior and payment preferences for Japanese respondents. On average, Japanese gamers live in a household of 3–4 people (with the median being 3 people per household).

GENDER



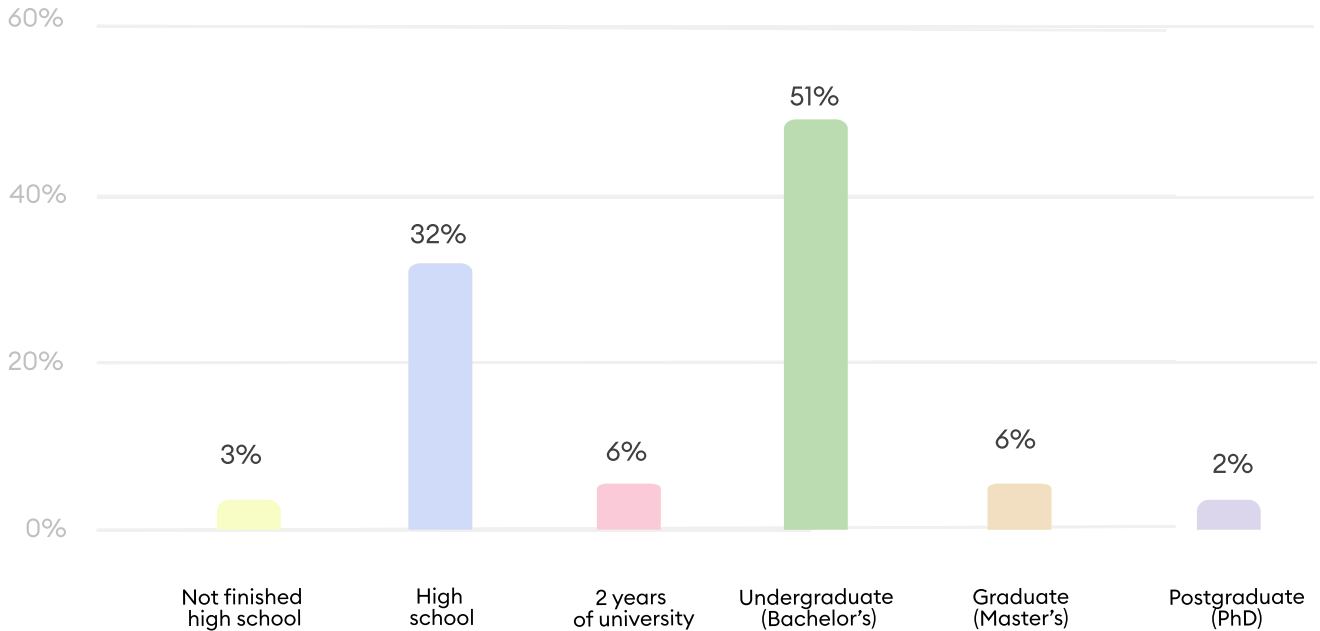
AGE
 respondents' age: 18-77
average age: 36 years

INCOME
 Japanese gamers earn
300000 - 544999 JPY

LIFESTYLE
 they live in a household
of 3-4 people

Regarding their education, more than half of Japanese gamers have a bachelor's degree or an equivalent (51%). One can see that the vast majority of Japanese gamers have a level of education higher than a high school diploma (with only 3% not having finished high school). Around 1/3 of respondents have a high school diploma only (32%). Around 8% of respondents have higher levels of education such as a graduate or postgraduate degree (with 6% having a master's degree and 2% having a doctoral degree).

EDUCATION



THE PRICE OF FUN: PAYMENT HABITS

The amount of money spent on video games in Japan is quite staggering. According to our research, Japanese gamers have spent an average of \$1,275 USD on video games throughout the last 12 months. This figure is based upon a minimum spend of zero and a maximum spend of \$10,000 USD.

When it comes to gaming, the Japanese are in a league of their own! Looking at the data from 80.lv's Heavy Indie Gamers Research from 2022, Japanese gamers spend 3 times as much money annually as heavy indie gamers do, and 6 times more than traditional gamers from the US, UK, and Germany. Clearly, they have an appetite for gaming that knows no bounds! Understanding how much people are willing to spend on video games can inform decisions about pricing models, target audiences, or even product design elements like graphics quality levels, etc.

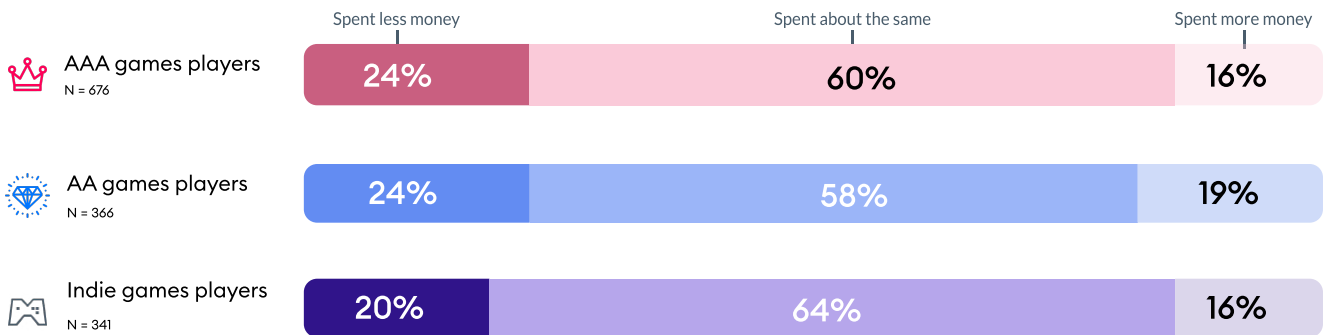
\$1,275 USD

is the amount that Japanese gamers have spent on video game in the past 12 months, on average

*according to 80 Level 2022 Research of Japanese Gamers

This year, the majority of Japanese gamers spent roughly the same amount of money as they did last year (60%). However, an interesting trend emerged when it came to indie game players – these individuals were far less likely to spend less money than others when comparing 2021 and 2022 (20% of those who play indie games compared to 24% of AAA and AA players). This could be attributed to several factors: those who are dedicated enough to playing indie games may have deeper pockets since they’re willing to invest into something that not everyone is familiar with or interested in playing.

PAST GAMING SPENT 2021 VS 2022



According to our survey, the majority of Japanese gamers purchase their games from the Nintendo eShop at 49%; the App Store at 35%; followed by the PlayStation Store at 25%. Other popular stores include Steam (11%), Google Play (24%), and Xbox Live (4%).

Although these three platforms dominate in Japan, there are still plenty of other options available for those looking for something different or more affordable than what’s offered on mainstream platforms like PlayStation or Xbox Live, such as Humble Bundle/Humble Store (2%), GOG (1.5%), Origin (3%), Uplay (2%), IndieGala (2.1%), BattleNet (1%), Epic GameStore (6%), Apple Arcade (10%), and Google Play Pass (8%). These alternative services offer unique experiences that may be worth exploring if you’re looking for something new or innovative.

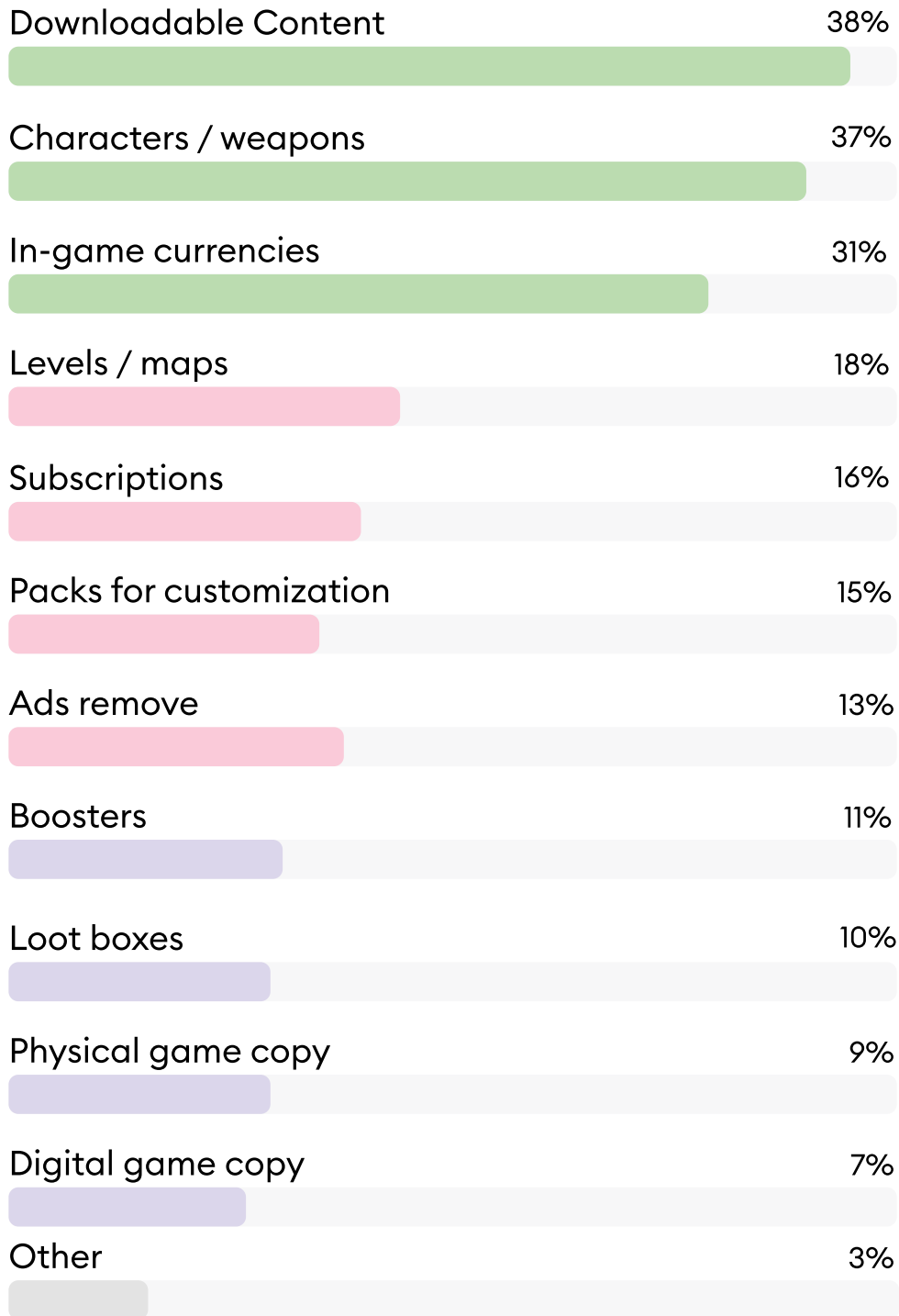
GAME STORES



According to our survey, the majority of Japanese gamers purchase their games from the Nintendo eShop at 49%; the App Store at 35%; followed by the PlayStation Store at 25%. Other popular stores include Steam (11%), Google Play (24%), and Xbox Live (4%).

Although these three platforms dominate in Japan, there are still plenty of other options available for those looking for something different or more affordable than what's offered on mainstream platforms like PlayStation or Xbox Live, such as Humble Bundle/Humble Store (2%), GOG (1.5%), Origin (3%), Uplay (2%), IndieGala (2.1%), BattleNet (1%), Epic GameStore (6%), Apple Arcade (10%), and Google Play Pass (8%). These alternative services offer unique experiences that may be worth exploring if you're looking for something new or innovative.

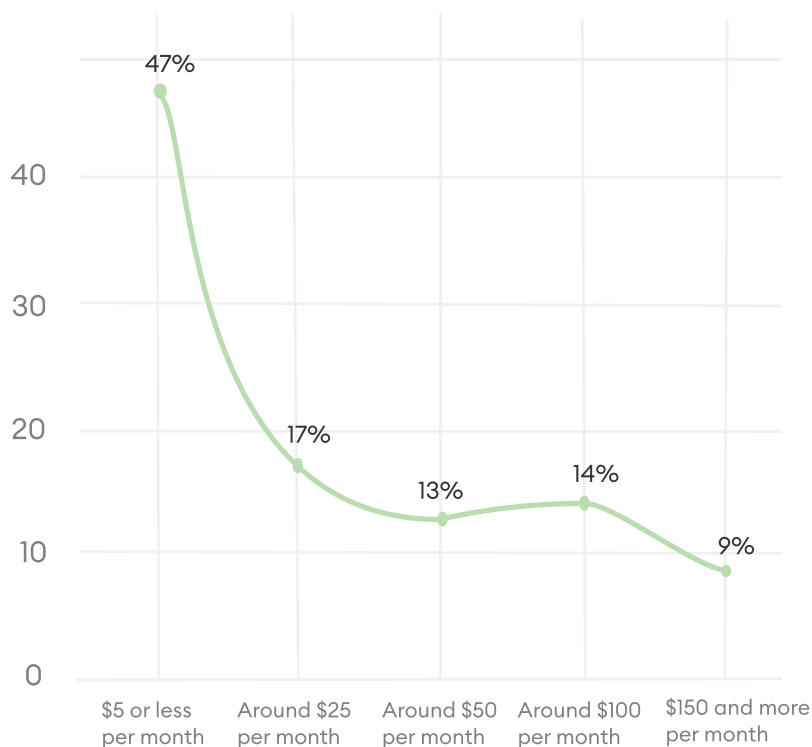
GAME-RELATED PURCHASES



Japanese gamers have demonstrated their level of interest in a variety of game-related purchases, **from downloadable content (DLC) at 38% to characters and weapons at 37%. In-game currencies are also popular among Japanese gamers (31%), as well as levels and maps (18%).** Subscriptions come in at 16%, while customization packs make up 15%. Ad removal is an attractive option for 13% of Japanese gamers, followed by boosters with 11%. Loot boxes come in just below that at 10%, while physical game copies are preferred by 9% of the gaming population. Digital game copies round out the list with 7%, leaving 3% who prefer something else entirely. These figures demonstrate the diverse range of products that Japanese gamers are willing to invest in when it comes to gaming.

Almost half of Japanese gamers are watching their wallets, with 47% spending \$5 or less per month on game-related purchases. According to 80 Level's survey, there is still a sizable portion of the gaming population that are willing to invest more in their hobby, with around 9% spending over \$150 per month. It seems that those people are willing to shell out a small fortune every month just to stay up-to-date with all of their gaming needs!

% SPENT ON GAME RELATED PURCHASES PER MONTH



When asked about experience of making in-app purchases, **respondents tend to rate their experience with the last-generation consoles** such as the PlayStation 5, Xbox Series X/S, and Nintendo Switch **with higher scores than mobile or laptop gaming options for making purchases**

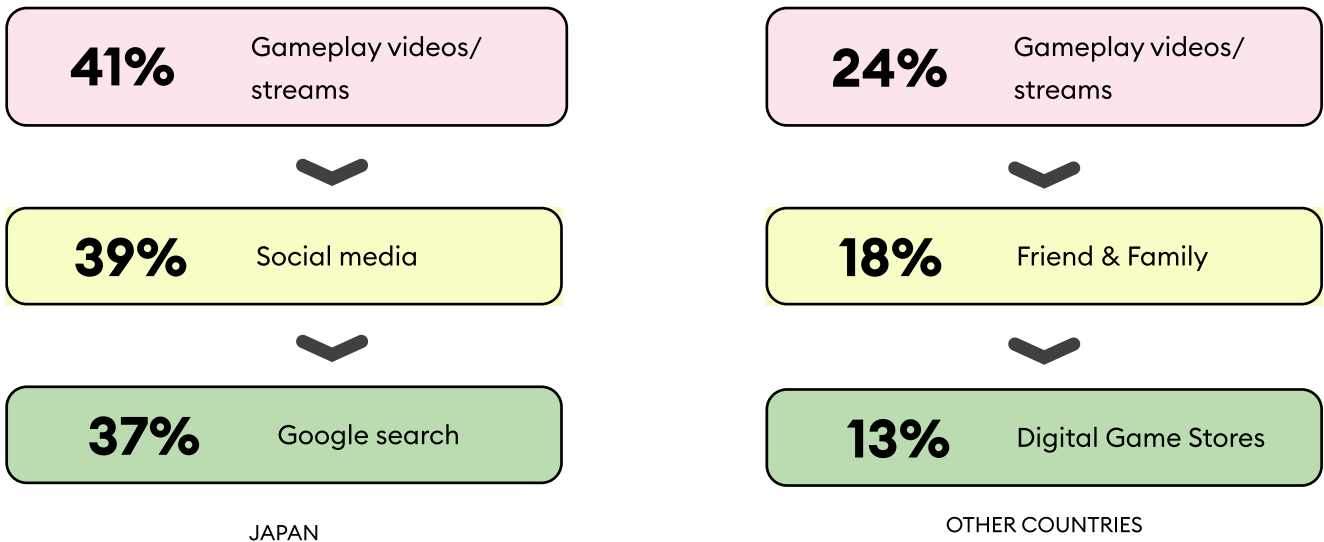
*according to 80 Level 2022 Research of Japanese Gamers

MARKETING MAGIC: UNLOCKING FACTORS TRIGGERING SALES

When it comes to learning about new releases, gamers have a wide array of sources available. **According to this research, the top sources for gamers include gameplay videos/streams (41%), social media (39%), and Google searches (37%).** These three resources are by far the most popular among gamers when searching for information on upcoming titles. They are also considered very influential when learning something new about games with around 1/3-1/4 of respondents supporting this evaluation. While these three resources are very popular among gamers looking for info on new releases, there are still many other options out there including **talking with friends/family (30%), game ads/trailers/websites (29%), gaming review aggregators (24%),** gaming news sites/reviewers (21%), digital game stores (18%), retailer websites (14%), gaming threads/forums (10%), and, finally, podcasts (9%).

Gamers around the world have different preferences. While **gameplay videos are more popular in Japan (41%),** they only account for 1/4 of all sources used by gamers worldwide. However, this doesn't mean that gameplay videos aren't important – they remain the first and most important trigger for a quarter of all gamers globally! On top of that, **communication with friends and family (18%) as well as keeping tabs on digital game stores (13%)** are also key ways in which players stay informed about upcoming releases.

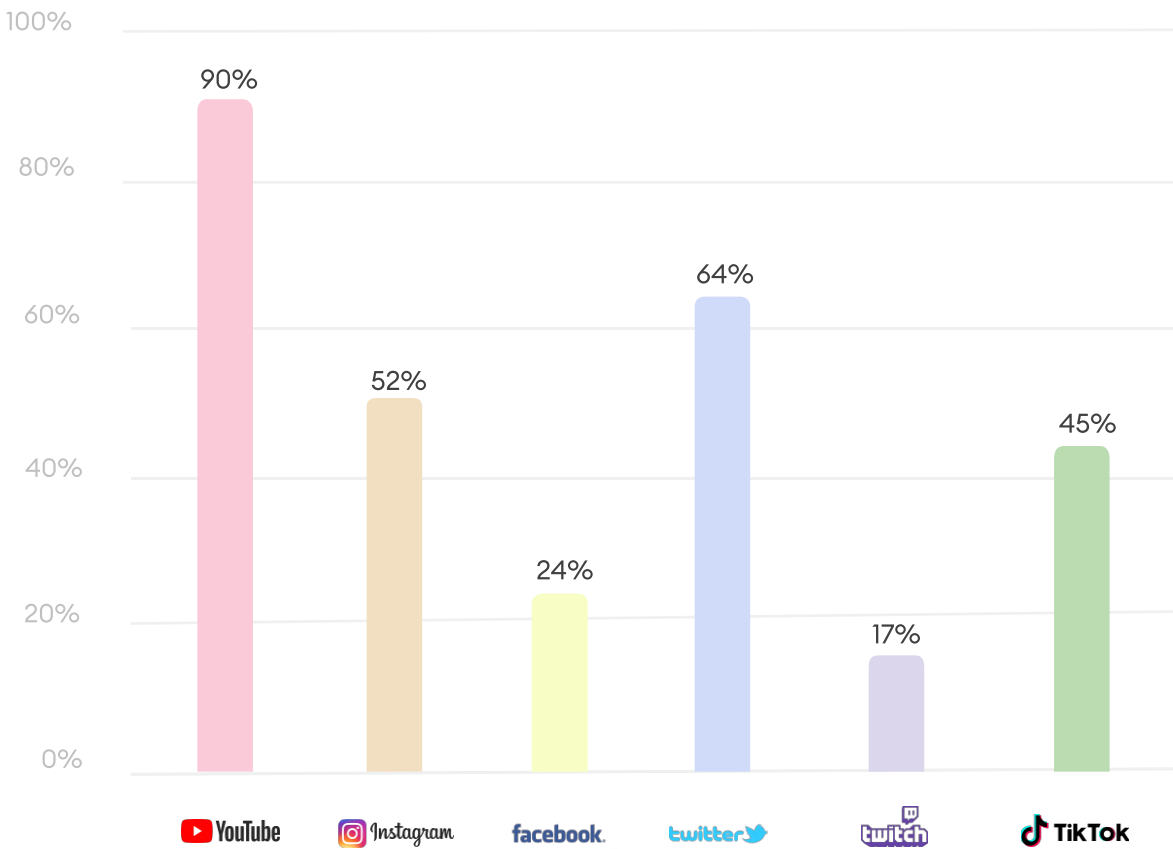
TOP-3 SOURCES WHERE GAMERS FIRST LEARN ABOUT NEW RELEASES



In the past three months, Japanese gamers have been utilizing a wide variety of social media platforms. According to our research, **YouTube has seen an impressive 90% usage rate, while Twitter and Instagram follow closely behind with 64% and 52%, respectively.** For companies looking to reach out to their target audience in Japan, these three sites should not be overlooked as they are some of the most popular among gamers.

Other websites/apps are also being used by some Japanese gamers, but to a lesser degree. TikTok is being utilized by 45% while Twitch is only at 17%. Lastly, Facebook stands at 24% and is the only platform for which popularity differs significantly when we compare its usage throughout the world and in Japan; while globally, around 80% of people use Facebook, in Japan it is only ¼ of gamers. **While it may be tempting for companies to focus solely on the top 3 choices due to their popularity among users, they would be wise not to ignore those lower down on the list as there could still be potential customers who utilize them regularly.**

SOCIAL MEDIA USAGE



Japan is a nation of independent spirits and self-starters. They're more likely to blaze their own trails and forge their own unique paths through the world of gaming. 57% of Japanese gamers don't follow any specific gamer or gaming influencer at all.

57% of Japanese gamers don't follow any specific gamers/gaming influencers
*according to 80 Level 2022 Research of Japanese Gamers

If you want to follow in the footsteps of Japanese gamers and who they follow, then look first at this list of the top 5. **These influencers offer insight into what is trending among Japanese gamers, providing a great way to understand the country’s gaming market.**

TOP GAMER INFLUENCERS IN JAPAN



だるまいずごっど darumaisgod	加藤純一です jun channel	ゆきお2 yukiofps14	SPYGEA	Jasper7se
-------------------------	-----------------------	--------------------	--------	-----------

% of Gamers following

18%	17%	12%	7%	7%
-----	-----	-----	----	----

N of followers in Youtube

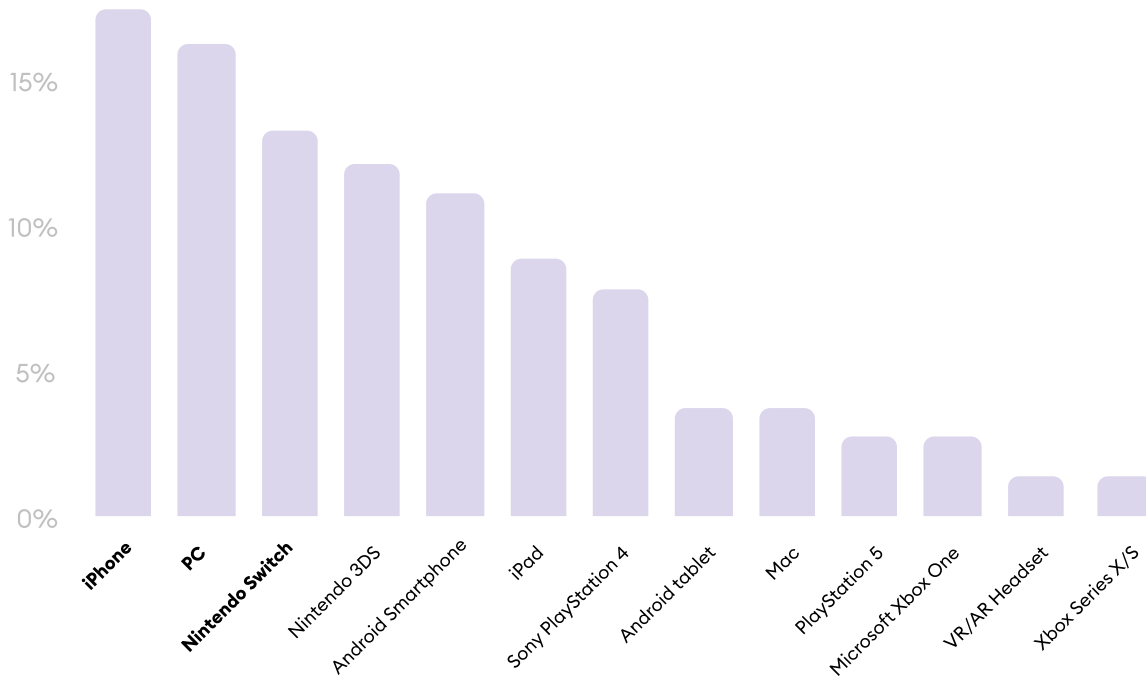
1.14M	1.16M	99.4 K	300K	454K (Twitch)
-------	-------	--------	------	---------------

HARDWARE HEAVEN: POPULAR GAMING DEVICES

Almost the same number of Japanese gamers own iPhones and PCs (17% and 16%), making them the most popular platforms. Following in their footsteps, the second spot is taken by Nintendo Switch, Nintendo 3DS, and Android smartphones (from 13% to 11%). The third place is shared between the iPad and Playstation 4, with 9% and 8% ownership, respectively.

Looking more closely at the numbers of average gaming time on these devices, iPhones take the first spot again with more than 10 hours of playtime spent each week. iPhone is followed shortly by Playstation 4 with 8 weekly hours of gaming time (with a median of 4). The third place is shared by Android smartphones with 6 hours, Sony PlayStation 4 Slim/Pro with 5.5 hours, and Nintendo Switch/Switch Lite. Japanese gamers play for around 4 hours using devices such as iPad, VR/AR Headsets, and PC; 3.5 hours on Xbox Series X|S, and 3 hours on Nintendo 3DS or Mac. Microsoft Xbox One/One S/One X and Android tablets are played 2 hours weekly by our respondents.

DEVICES OWNERSHIP



HOURS SPENT PLAYING

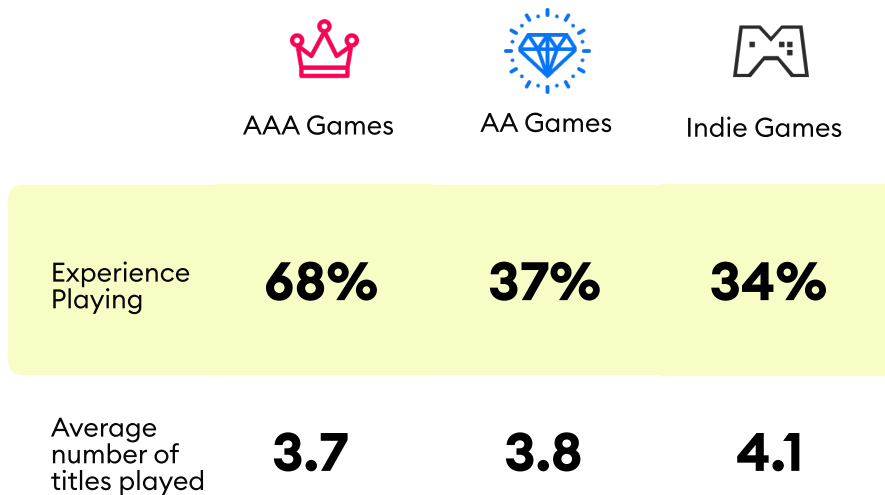
iPhone	10,5
PlayStation 5	8,3
Android Smartphone	6,3
Sony PlayStation 4	5,5
Nintendo Switch/Lite	5,5
iPad	4,6
VR/AR Headset	4,3
PC	4,1
Xbox Series X / S	3,5
Nintendo 3DS	3,3
Mac	2,7
Microsoft Xbox One	2,4
Android tablet	2,4



EXPLORING THE MOST POPULAR GAMES' ATTRIBUTES

It is no secret that Japan has one of the most dedicated gaming communities in the world, and our data supports it. The survey has shown that 68% of gamers in Japan have played AAA titles, 37% have played AA titles, and 34% Indie titles. This data indicates a strong preference for AAA games among Japanese gamers.

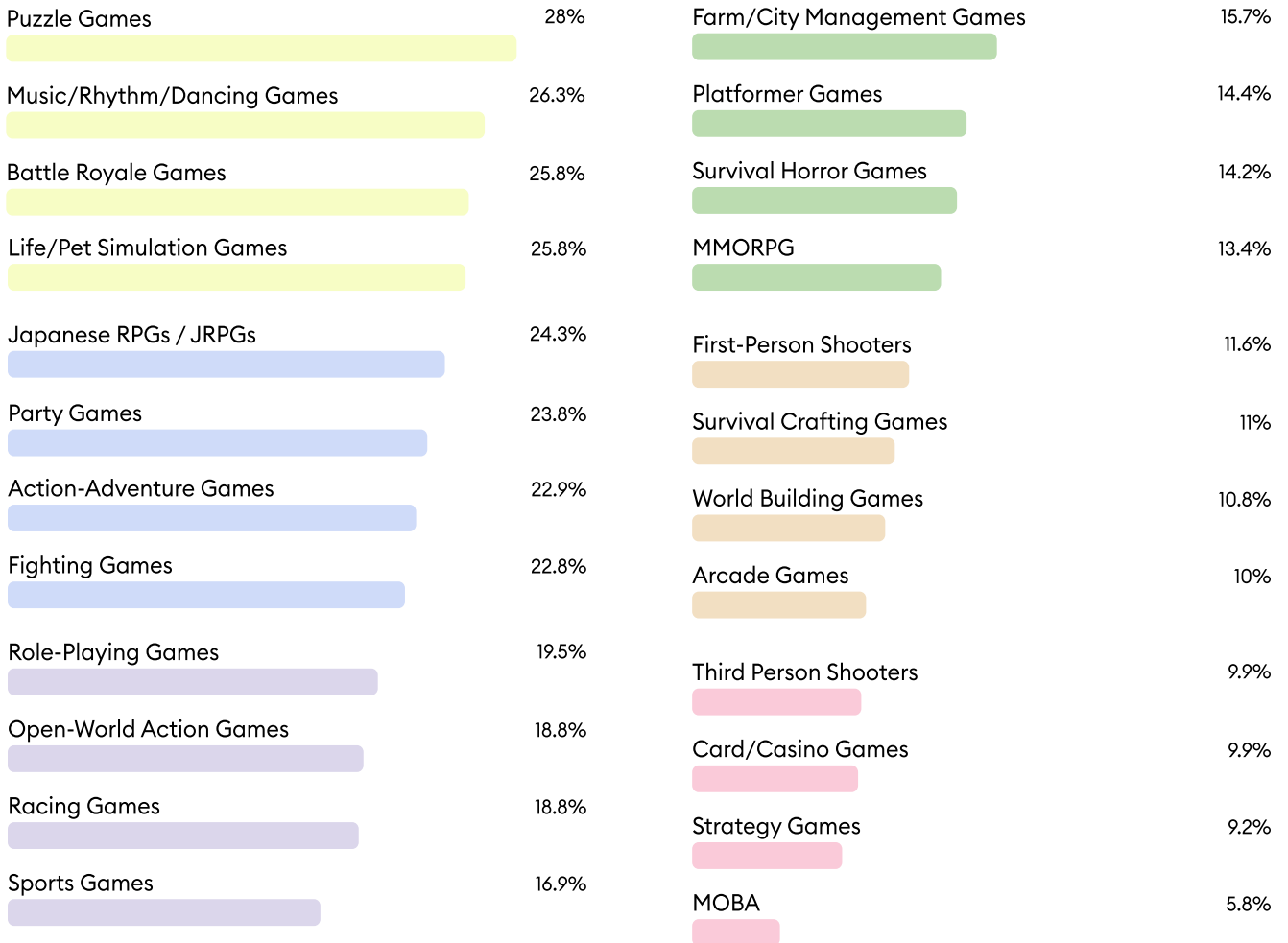
However, the average number of games played in each category is slightly different: on average 4.1 Indie games were played over the last 12 months compared to 3.8 AA and 3.7 AAA titles – indicating that gamers tend to favor indie titles with a higher frequency than their larger counterparts. This means that although fewer people may be playing Indie games, those who do play them tend to play more than others.



Among Japanese gamers, there is a wide variety of game genres being played. According to the survey completed by 80 Level, **the most popular genre is Puzzle games at 28%. Music/Rhythm/Singing/Dancing games come in second place with 26.3%, followed by Battle Royale Games and Life/Pet Simulation games both at 25.8%. Japanese RPGs / JRPGs make up 24.2% of the surveyed players, while Party games and Action-Adventure games take up 23.8% and 22%, respectively.** Fighting games also have a strong representation among this group with 22.8%. Role-Playing game fans account for 19.5% of all players while Open World Action gamers make up 18.8%, closely followed by Racing & Sports gamers, who together form 16.9% of surveyed respondents preferred the gaming experience overall.

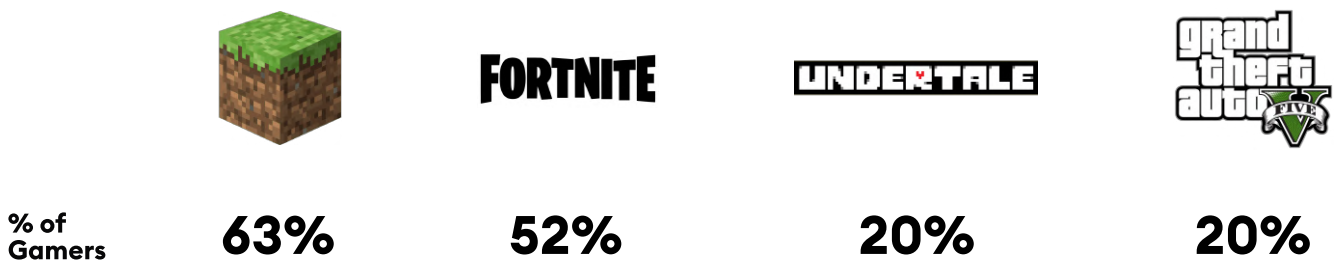
Overall, it is clear that Puzzle, Music & Rhythm, Battle Royale, Life Simulation, as well as RPGs are the most popular game genres among Japanese gamers today.

GENRES PLAYED

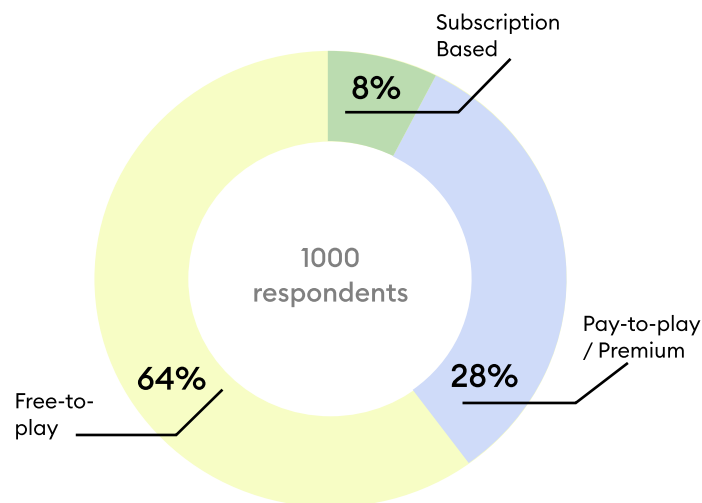


What of popular games / titles that Japanese gamers have played? From Minecraft to Far Cry 6, **there are a variety of titles that keep gamers coming back time and time again. Japan is a nation of avid gamers, with popular titles such as Minecraft (63%), Fortnite (52%), Undertale (20%) and Grand Theft Auto V/GTA Online (20%) topping the list for most played games in Japan**, according to this survey. Other notable entries include Call of Duty: Warzone at 17%, Terraria at 17%, and Assassins Creed at 15%.

TOP 4 POPULAR GAMES IN JAPAN



Free-to-play games are incredibly popular in Japan. According to our survey, **64% of gamers in Japan prefer free-to-play titles** such as League of Legends and Super Smash Bros., while 28% opt for pay-to-play/premium options like PUBG or New World; only 8% choose subscription-based titles like World of Warcraft instead. This preference towards free games may be based on the overall popularity of mobile games and due to its social aspect – many people enjoy playing together online without having to worry about spending money on additional content or services, which can be quite costly over time.



It is no surprise that gamers are more focused on the content of a game rather than who developed or published it. When asked about which developers or publishers made their favorite titles, 80% of respondents had little to no recollection at all. It is a worldwide tendency, as another research completed by 80 Level in the US, UK, and Germany in 2022 indicated the same outcome. This suggests that for many players, names like Activision Blizzard and Electronic Arts may not be as important as one might think, at least in terms of influencing consumer decisions when it comes to purchasing video games.

80%

of Japanese gamers cannot remember the names of their favorite game developer/publisher

*according to 80 Level 2022 Research of Japanese Gamers

Nintendo reigns supreme due to its strong presence throughout many years within the field. Nintendo is followed by various local publishers at 3.2%, and Square Enix takes third place with 1.4%. Some new names of game developers also appear in the picture: Hideo Kojima and Markus Persson both have 0.7% of the share from players in Japan; Shigeru Miyamoto also has a 0.7% share, and Pokemon/Niantic and Yuji Horii each have 0.6%, among others.

DEVELOPER / PUBLISHER

Nintendo	4,9%
Local Japanese Publishers	3,2%
Square Enix	1,4%
Hideo Kojima	1%
Markus Persson, Shigeru Miyamoto	0,7%
Bethesda, Pokemon/Niantic, Yuji Horii	0,6%
Epic Games	0,2%
Other	4,2%



Ultimately, despite these figures indicating otherwise, **there will always remain some level of loyalty towards certain brands within gaming culture whether due to nostalgia from past experiences shared between friends and family members, so don't give up hope just yet!** As long those relationships continue being fostered, then a resurgence in interest among fans towards acknowledging who develops and publishes games will be seen.

THE JOYS AND DRIVERS OF BEING A GAMER

Japanese gamers are the epitome of dedication when it comes to their gaming habits. Not only do they play games themselves, but **they also take time out of their day to watch others play, with a staggering 34% doing so.** The fact that only 6% of them create content online is also telling – they'd rather be playing than talking about their experiences with others!

GAME INTERACTIONS

34% Watch other people play

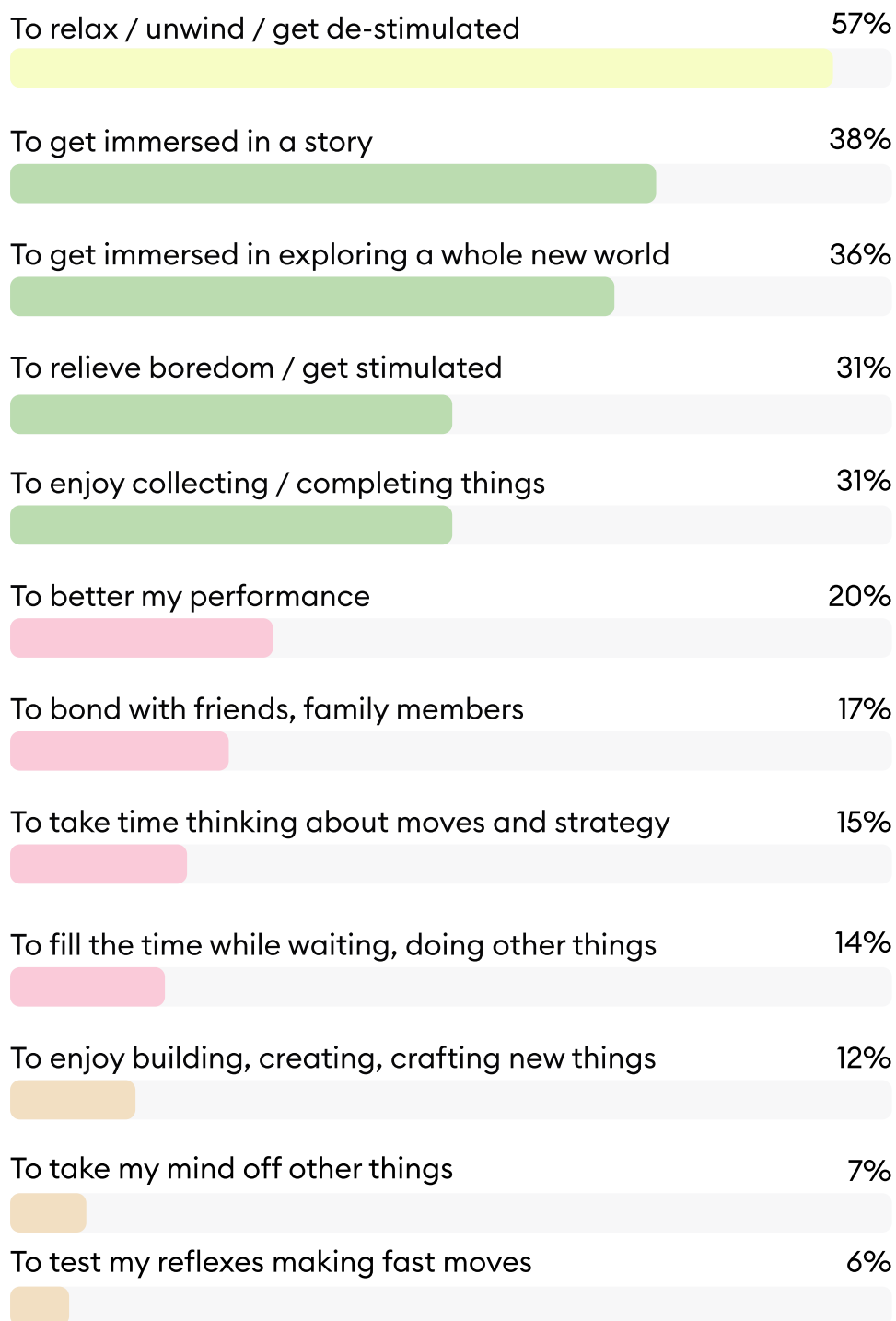


6% Create content online

With a total of 75.62 million gamers in Japan, and more than half of the country's population considering themselves gamers, would it be reasonable to find out what drives the passion for gaming for Japanese gamers? The answer lies in a combination of factors that make up Japanese culture: hard work, dedication to craftsmanship and attention to detail, an appreciation for artistry, a strong sense of community, and an emphasis on competition as well as cooperation. All these elements combine together into something that goes beyond simply playing video games – they create an environment where players can express themselves through play while also honing their skills in order to become better competitors or collaborators with others.

One key element motivating Japanese gamers is **relaxation – 57% cite this factor when asked why they game. Additionally, 38% are motivated by story-driven narratives** – escaping reality by becoming immersed in narrative adventures has long been part of the appeal for choosing games as a way to spend one’s free time. If we compare motivators of Japanese gamers to data from 80 Level’s research of gamers worldwide, we can see that the motivators differ. **In the rest of the world, the top 3 factors are creativity (which is important for 40% of gamers), relaxation (similar to Japanese gamers at 35%), followed by feelings of adventure, exploration, and immersion within the story (30%).**

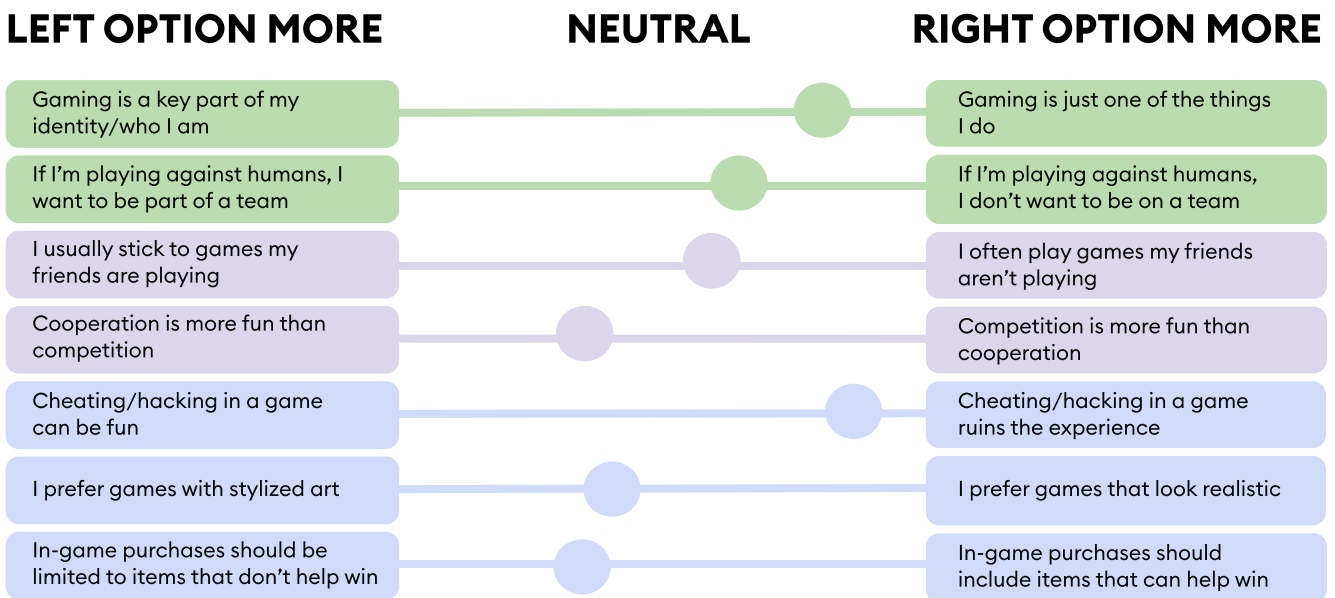
GAME-MOTIVATORS



What gaming-related personal traits do Japanese gamers associate with themselves? By taking a closer look at what they identify with, we can better understand how Japanese people interact with games and use them as part of their identity.

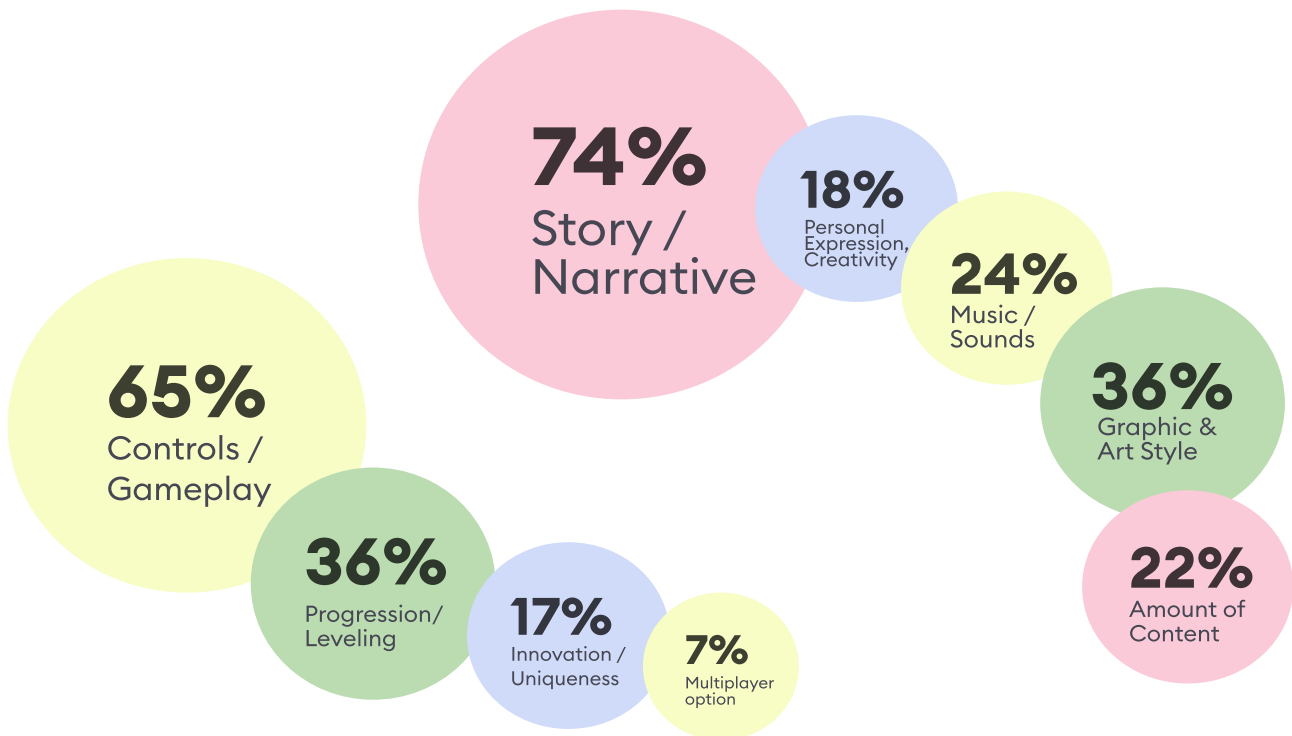
Japanese gamers:

- tend more towards games being just one of many things they do rather than making it their key personality trait,
- are indifferent when deciding whether to join a team or play on their own,
- don't solely rely on opinions from friends, instead choosing both games that their friends play and those that they don't – highlighting an individualistic attitude,
- prefer cooperative titles over competitive ones,
- believe that cheating ruins the fun for them, while in-game purchases should be limited to items not helpful in winning (i.e. cosmetics only),
- have (shared with other players around the globe) an appreciation for stylized art within video game titles more so than realistic art styles.



According to our survey, the top three aspects that are most important for Japanese gamers include story/narrative, controls/gameplay feel, and the graphics/art style. Storytelling is an integral part of any successful video game title in Japan, as evidenced by its 74% ranking in this survey. Control and gameplay feel came in second at 65%, followed by graphics/art style at 36%, shared with progression systems at the same 36% in the third place. Music / sounds did make the top list for a quarter of our respondents (24%).

It's clear from these results that story is an incredibly powerful aspect when trying to appeal to Japanese consumers. This should be reflected in any game design intended for release on this market – developers must ensure they create compelling narratives with interesting characters if they want their product to do well here. However, don't ignore the importance of good gameplay mechanics either, nor the art style and graphics quality – both will play a vital role in ensuring maximum reach among the target audience in Japan!



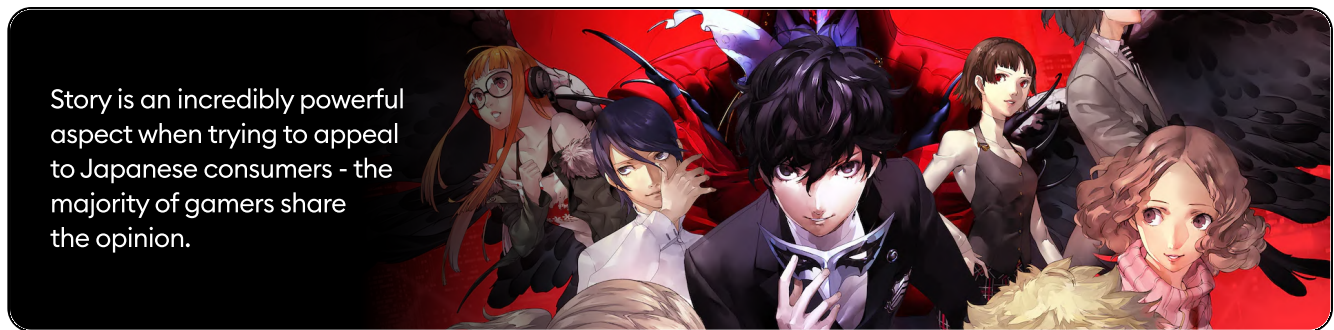
CONCLUSION: TOP CHARACTERISTICS OF JAPANESE GAMERS

AAA TITLES VS INDIE

68% of gamers in Japan have played AAA titles - data indicates a strong preference for AAA games among Japanese gamers.

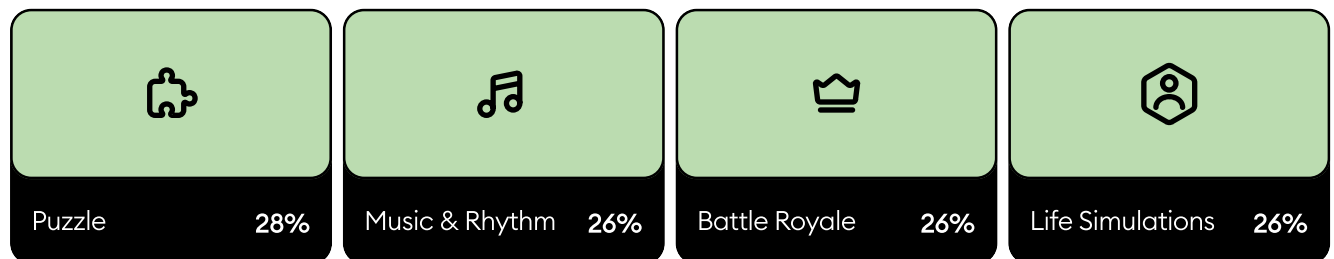


STORY VS GAMEPLAY



GENRES

Control and gameplay feel came in second place. Puzzle, Music & Rhythm, Battle Royale, Life Simulations as well as RPGs are the most popular game genres amongst Japanese gamers today!

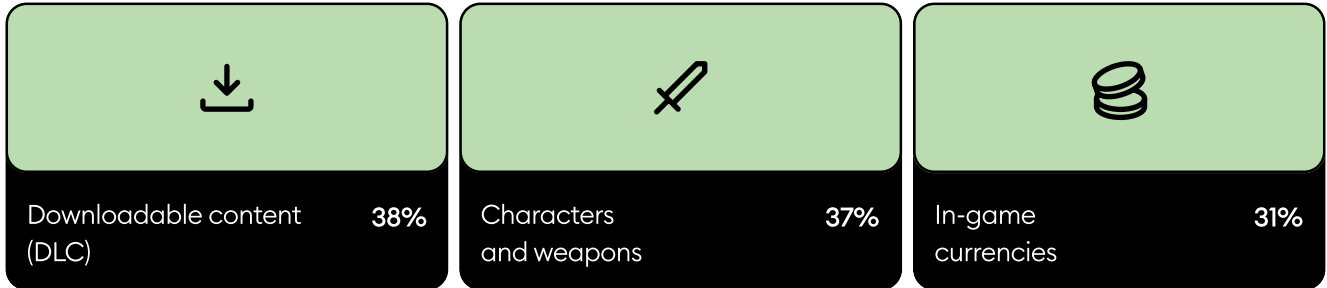


PURCHASES



GAME-RELATED PURCHASES

Japanese gamers have demonstrated their interest in a variety of game-related purchases:

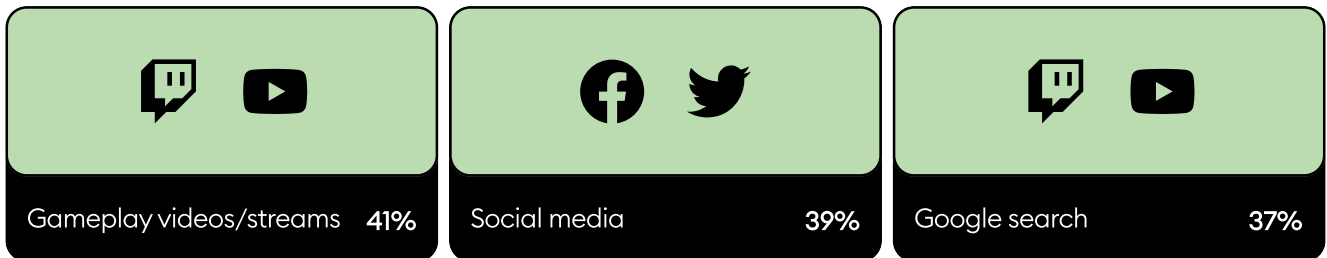


DEVELOPERS AND PUBLISHERS RECOGNITION

Gamers are more focused on the content of a game rather than on who developed or published it. When asked about which developers or publishers made their favorite titles, **80%** of respondents had little to no recollection at all.

NEW RELEASES

When it comes to learning about new releases, gamers have a wide array of sources available. The top sources for gamers include :



INFLUENCERS

57% of Japanese gamers don't follow any specific gamer or gaming influencer - after all when it comes to gaming.

Annex #1

References

1. [GDP \(current US\\$\) - Japan / The world bank](#)
2. [Japan Population - Wordometr](#)
3. [80LV Research: Heavy Indie Gamers, Who Are They?](#)
4. [Video Games in Japan, an industry that dominates the world](#)

80 Level Team:

Feel free to contact us if you have any questions.



Kirill Tokarev
80.LV CEO
K.TOKAREV@80.LV



Viktoria Steshina
Research Manager
V.STESHINA@80.LV



Anna Gulyaeva
Research Specialist
A.GULYAEVA@80.LV



Averyan Anchugin
Research Specialist
A.ANCHUGIN@80.LV



Irina Ignatova
Senior Research Analyst
I.IGNATOVA@80.LV



Anna Libreht
Junior Research Specialist
A.LIBREKHT@80.LV



We can make a custom research for you! Contact 80 Level Research Team to learn more.
research@80.lv