

## **Indonesia Gaming Market Forecast 2025-2032**

Market Report | 2025-03-26 | 143 pages | Inkwood Research

### **AVAILABLE LICENSES:**

- Single User Price \$1100.00
- Global Site License \$1500.00

### **Report description:**

#### **KEY FINDINGS**

The Japan gaming market was valued at \$18.42 billion in 2024 and is expected to rise with a CAGR of 5.66% over the forecast years of 2025 to 2032. The base year regarded for the studied market is 2024, and the forecasting years are from 2025 to 2032.

#### **MARKET INSIGHTS**

Japan's gaming industry is experiencing significant growth, fueled by technological advancements and changing consumer preferences. The proliferation of high-speed internet and widespread smartphone adoption has particularly boosted the mobile gaming segment, driving its rapid expansion.

Additionally, the increasing popularity of eSports has led to higher investments in infrastructure, events, and professional teams, further propelling the market forward.

However, new gaming companies entering the Japanese market must navigate a complex regulatory environment. Various regulations govern the industry, including the Payment Services Act, the Act against Unjustifiable Premiums and Misleading Representations, and the Amusement Business Act.

Compliance with guidelines from organizations like the Japan Online Games Association (JOGA) and the Computer Entertainment Supplier's Association (CESA) is crucial.

The Computer Entertainment Rating Organization (CERO) also plays a key role in these regulations. These regulations address key aspects such as game publishing, monetization strategies, and consumer protection measures.

Emerging trends create substantial opportunities within the market. Augmented reality games and virtual reality games are gaining traction, delivering immersive experiences that captivate players.

The rise of anime-based games further strengthens the industry, drawing from Japan's rich cultural heritage in manga and anime. KLab Inc's smartphone game based on Haruichi Furudate's manga Haikyuu exemplifies this trend, showcasing stunning visuals and engaging gameplay.

By merging popular media forms, these games appeal to both domestic and international audiences, expanding the market's reach. The gaming industry plays a vital role in Japan's economy. In 2022, it accounted for 0.1% of Japan's GDP, a notable contribution for a single sector.

With increasing investments in game development and emerging technologies, this share is expected to grow. The industry also employs over 100,000 professionals, including game developers, designers, artists, and marketers.

Additionally, it fosters new career paths, such as eSports players and content creators, further boosting economic growth.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## SEGMENTATION ANALYSIS

The Japan gaming market segmentation includes the market by type, component, platform, genre, monetization model, age demographic, and distribution channel. The age demographic segment is further divided into children (under 18), adults (18 - 44), and seniors (45+).

In Japan's gaming market, the 18 to 44 age demographic plays a pivotal role, actively engaging across various gaming platforms. A 2019 survey showed that approximately 73% of individuals aged 18 to 24 played mobile games on their smartphones, emphasizing mobile gaming's dominance among younger adults.

Console gaming also attracts strong participation within this age group. In 2022, data revealed that 70.60% of gaming console owners in Japan were aged 18 to 24, demonstrating their strong preference for console gaming.

eSports has gained significant traction among this demographic. A 2022 survey found that 23% of men aged 20 to 29 showed interest in eSports, highlighting their engagement with competitive gaming.

These insights reflect the strong engagement of the 18 to 44 age group in Japan's gaming industry, presenting opportunities for tailored content and strategic marketing.

## COMPETITIVE INSIGHTS

Some of the top players operating in the Japan gaming market include Nintendo Co Ltd, Sega Sammy Holdings Inc, Square Enix Holdings Co Ltd, etc.

Nintendo Co Ltd, based in Kyoto, Japan, is a global leader in video game development and console manufacturing. The company operates across key segments, including dedicated gaming hardware, software development, and mobile gaming.

It serves markets in Japan, North America, Europe, and the Asia-Pacific. The company's product portfolio includes iconic gaming consoles such as the Nintendo Switch, Switch OLED, and Switch Lite.

Franchises like Super Mario, The Legend of Zelda, Pokemon, and Animal Crossing also contribute to Nintendo's success. Nintendo has also expanded into mobile gaming with popular titles like Mario Kart Tour and Fire Emblem Heroes.

## Table of Contents:

### TABLE OF CONTENTS

#### 1. RESEARCH SCOPE & METHODOLOGY

##### 1.1. STUDY OBJECTIVES

##### 1.2. METHODOLOGY

##### 1.3. ASSUMPTIONS & LIMITATIONS

#### 2. EXECUTIVE SUMMARY

##### 2.1. MARKET SIZE & ESTIMATES

##### 2.2. COUNTRY SNAPSHOT

##### 2.3. COUNTRY ANALYSIS

##### 2.4. SCOPE OF STUDY

##### 2.5. MAJOR MARKET FINDINGS

##### 2.5.1. STRONG MARKET LEADERSHIP IN CONSOLE GAMING FUELED BY ADVANCED TECHNOLOGY AND ICONIC FRANCHISES

##### 2.5.2. PC AND CONSOLE GAMING WITNESS STEADY GROWTH AMIDST MOBILE GAMING SURGE

##### 2.5.3. SUBSCRIPTION-BASED GAMING MODELS ARE GAINING TRACTION AMONG PUBLISHERS AND PLAYERS

##### 2.5.4. SUSTAINABLE AND INCLUSIVE GAMING PRACTICES EMERGING AS INDUSTRY PRIORITIES

#### 3. MARKET DYNAMICS

##### 3.1. KEY DRIVERS

##### 3.1.1. SURGE IN MOBILE GAMING FUELED BY SMARTPHONE PENETRATION AND AFFORDABLE INTERNET

##### 3.1.2. ADVANCEMENTS IN CLOUD GAMING TECHNOLOGIES ARE ENABLING SEAMLESS ACCESS

##### 3.1.3. RISING POPULARITY OF ESPORTS AND COMPETITIVE GAMING ACROSS THE COUNTRY

##### 3.2. KEY RESTRAINTS

##### 3.2.1. HIGH DEVELOPMENT COSTS FOR AAA GAMES AND ADVANCED GAMING HARDWARE

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

- 3.2.2. LIMITED INFRASTRUCTURE AND CONNECTIVITY IN EMERGING ECONOMIES
- 3.2.3. CONCERNS OVER GAMING ADDICTION AND ASSOCIATED HEALTH ISSUES
- 4. KEY ANALYTICS
  - 4.1. TIMELINE OF THE GAMING INDUSTRY
  - 4.2. PARENT MARKET ANALYSIS: MEDIA & ENTERTAINMENT
  - 4.3. KEY MARKET TRENDS
    - 4.3.1. INTEGRATION OF AUGMENTED REALITY (AR) AND VIRTUAL REALITY (VR) FOR IMMERSIVE GAMING EXPERIENCES
    - 4.3.2. INCREASING FOCUS ON CROSS-PLATFORM GAMING TO ENHANCE USER ENGAGEMENT
    - 4.3.3. GROWTH IN INDIE GAME DEVELOPMENT SUPPORTED BY CROWDFUNDING PLATFORMS
    - 4.3.4. EXPANDING ROLE OF ARTIFICIAL INTELLIGENCE IN GAME DESIGN AND PLAYER INTERACTION
  - 4.4. PORTER'S FIVE FORCES ANALYSIS
    - 4.4.1. BUYERS POWER
    - 4.4.2. SUPPLIERS POWER
    - 4.4.3. SUBSTITUTION
    - 4.4.4. NEW ENTRANTS
    - 4.4.5. INDUSTRY RIVALRY
  - 4.5. GROWTH PROSPECT MAPPING
  - 4.6. MARKET MATURITY ANALYSIS
  - 4.7. MARKET CONCENTRATION ANALYSIS
  - 4.8. VALUE CHAIN ANALYSIS
    - 4.8.1. GAME DEVELOPMENT
    - 4.8.2. PLATFORM INTEGRATION AND PUBLISHING
    - 4.8.3. DISTRIBUTION CHANNELS
    - 4.8.4. MARKETING AND PROMOTION
    - 4.8.5. END-USER ENGAGEMENT AND FEEDBACK
  - 4.9. REGULATORY FRAMEWORK AND COMPLIANCE BODIES
  - 4.10. EXCLUSIVE INSIGHTS
    - 4.10.1. AVERAGE PRICE OF SINGLE PLAYER GAME & LIVE SERVICES GAMES
    - 4.10.2. GENRE PREFERENCE VARY BY AGE - DRIVEN BY LIFESTYLE AND GENERATIONAL DIFFERENCES
    - 4.10.3. NEXT GENERATION OF RETIREES EXPECTED TO PLAY GAMES MORE THAN CURRENT RETIREES
    - 4.10.4. PLAYERS IN EMERGING ECONOMIES PLAY MORE AND PLAN TO PLAY MORE IN THE FUTURE
    - 4.10.5. INSIGHTS ON METAVERSE AND ITS IMPACT ON THE FUTURE OF GAMING INDUSTRY
- 5. MARKET BY TYPE
  - 5.1. ONLINE
    - 5.1.1. MARKET FORECAST FIGURE
    - 5.1.2. SEGMENT ANALYSIS
  - 5.2. OFFLINE
    - 5.2.1. MARKET FORECAST FIGURE
    - 5.2.2. SEGMENT ANALYSIS
- 6. MARKET BY COMPONENT
  - 6.1. SOFTWARE
    - 6.1.1. MARKET FORECAST FIGURE
    - 6.1.2. SEGMENT ANALYSIS
  - 6.2. HARDWARE
    - 6.2.1. MARKET FORECAST FIGURE
    - 6.2.2. SEGMENT ANALYSIS
- 7. MARKET BY PLATFORM

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

- 7.1. CONSOLE GAMING
  - 7.1.1. MARKET FORECAST FIGURE
  - 7.1.2. SEGMENT ANALYSIS
- 7.2. MOBILE GAMING
  - 7.2.1. MARKET FORECAST FIGURE
  - 7.2.2. SEGMENT ANALYSIS
- 7.3. PC GAMING
  - 7.3.1. MARKET FORECAST FIGURE
  - 7.3.2. SEGMENT ANALYSIS
- 7.4. CLOUD GAMING
  - 7.4.1. MARKET FORECAST FIGURE
  - 7.4.2. SEGMENT ANALYSIS
- 8. MARKET BY GENRE
  - 8.1. ADVENTURE/ROLE PLAYING GAMES
    - 8.1.1. MARKET FORECAST FIGURE
    - 8.1.2. SEGMENT ANALYSIS
  - 8.2. PUZZLE GAMES
    - 8.2.1. MARKET FORECAST FIGURE
    - 8.2.2. SEGMENT ANALYSIS
  - 8.3. SOCIAL GAMES
    - 8.3.1. MARKET FORECAST FIGURE
    - 8.3.2. SEGMENT ANALYSIS
  - 8.4. STRATEGY GAMES
    - 8.4.1. MARKET FORECAST FIGURE
    - 8.4.2. SEGMENT ANALYSIS
  - 8.5. SIMULATION GAMES
    - 8.5.1. MARKET FORECAST FIGURE
    - 8.5.2. SEGMENT ANALYSIS
  - 8.6. OTHER GENRES
    - 8.6.1. MARKET FORECAST FIGURE
    - 8.6.2. SEGMENT ANALYSIS
- 9. MARKET BY MONETIZATION MODEL
  - 9.1. IN-APP ADVERTISING
    - 9.1.1. MARKET FORECAST FIGURE
    - 9.1.2. SEGMENT ANALYSIS
  - 9.2. SUBSCRIPTIONS
    - 9.2.1. MARKET FORECAST FIGURE
    - 9.2.2. SEGMENT ANALYSIS
  - 9.3. IN-GAME PURCHASES
    - 9.3.1. MARKET FORECAST FIGURE
    - 9.3.2. SEGMENT ANALYSIS
  - 9.4. FREE-TO-PLAY (F2P)
    - 9.4.1. MARKET FORECAST FIGURE
    - 9.4.2. SEGMENT ANALYSIS
- 10. MARKET BY AGE DEMOGRAPHIC
  - 10.1. CHILDREN (UNDER 18)
    - 10.1.1. MARKET FORECAST FIGURE

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

- 10.1.2. SEGMENT ANALYSIS
- 10.2. ADULTS (18 - 44)
  - 10.2.1. MARKET FORECAST FIGURE
  - 10.2.2. SEGMENT ANALYSIS
- 10.3. SENIORS (45+)
  - 10.3.1. MARKET FORECAST FIGURE
  - 10.3.2. SEGMENT ANALYSIS
- 11. MARKET BY DISTRIBUTION CHANNEL
  - 11.1. PHYSICAL RETAIL
    - 11.1.1. MARKET FORECAST FIGURE
    - 11.1.2. SEGMENT ANALYSIS
  - 11.2. DIGITAL DISTRIBUTION
    - 11.2.1. MARKET FORECAST FIGURE
    - 11.2.2. SEGMENT ANALYSIS
- 12. COMPETITIVE LANDSCAPE
  - 12.1. KEY STRATEGIC DEVELOPMENTS
    - 12.1.1. MERGERS & ACQUISITIONS
    - 12.1.2. PRODUCT LAUNCHES & DEVELOPMENTS
    - 12.1.3. PARTNERSHIPS & AGREEMENTS
    - 12.1.4. BUSINESS EXPANSIONS & DIVESTITURES
  - 12.2. COMPANY PROFILES
    - 12.2.1. BANDAI NAMCO HOLDINGS INC
      - 12.2.1.1. COMPANY OVERVIEW
      - 12.2.1.2. PRODUCTS
      - 12.2.1.3. STRENGTHS & CHALLENGES
    - 12.2.2. KOEI TECMO HOLDINGS CO LTD
      - 12.2.2.1. COMPANY OVERVIEW
      - 12.2.2.2. PRODUCTS
      - 12.2.2.3. STRENGTHS & CHALLENGES
    - 12.2.3. NINTENDO CO LTD
      - 12.2.3.1. COMPANY OVERVIEW
      - 12.2.3.2. PRODUCTS
      - 12.2.3.3. STRENGTHS & CHALLENGES
    - 12.2.4. SEGA SAMMY HOLDINGS INC
      - 12.2.4.1. COMPANY OVERVIEW
      - 12.2.4.2. PRODUCTS
      - 12.2.4.3. STRENGTHS & CHALLENGES
    - 12.2.5. SQUARE ENIX HOLDINGS CO LTD
      - 12.2.5.1. COMPANY OVERVIEW
      - 12.2.5.2. PRODUCTS
      - 12.2.5.3. STRENGTHS & CHALLENGES
    - 12.2.6. SONY INTERACTIVE ENTERTAINMENT INC
      - 12.2.6.1. COMPANY OVERVIEW
      - 12.2.6.2. PRODUCTS
      - 12.2.6.3. STRENGTHS & CHALLENGES

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## Indonesia Gaming Market Forecast 2025-2032

Market Report | 2025-03-26 | 143 pages | Inkwood Research

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

### ORDER FORM:

Select license	License	Price
	Single User Price	\$1100.00
	Global Site License	\$1500.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2025-05-11"/>
		Signature	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com