

Japan E-sports Market: Current Analysis and Forecast (2025-2033)

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Abstracts

Japan's esports market has been witnessing significant growth due to several reasons, such as the culturalization of gaming, the advancement of technology, and the enhancement in institutional support. Esports is seen as a structured form of competitive gaming and involves professional tournaments, platforms for streaming, assembly of teams, and the community of esports fans down to each other. The old gaming culture of Japan, which was the brainchild of such legendary games as Street Fighter and Pok?mon, offers a great environment for esports evolution. The active position of the government, including the activities aimed at developing esports as a legal sphere as well, promotes such growth even further. And not only that, but invoking esports in the sphere of educational institutions, where the universities are educating about esports management, is a change in society that indicates the fact that esports is a career.

The Japan E-sports market is set to show a growth rate of about 11.3% during the forecast period (2025-2033F). In the future, the Japanese esports market is set for further development, with some of its segments experiencing a specific fast pace of development. Sponsorship has become the biggest revenue-generating segment in line with the increase in brands that are looking forward to penetrating the separate esports audience. Media rights are also growing at a fast pace, as a result of the increase in live streaming and consumption of content. During the first half of 2024, streams from Japan accumulated more than 2.17 billion hours watched, representing a 39.4% growth against the first half of 2023. This surge is a reflection of an increasing demand for esports content and monetization opportunities integrated into the said content. Furthermore, the emergence and proliferation of virtual influencers, or VTubers, is restructuring the content scene, with streams of Japanese VTubers racking up more than 513 million hours watched in the first half of 2024. With more technological

innovations coming up and with increased acceptance of esports in society, the Japanese esports market is destined to become more diversified and integrated into the global esports world.

Based on the Revenue Model, the market is segmented into Media Rights, Advertising and Sponsorships, Merchandise and Tickets, and Others. Among these, the Advertising and Sponsorships segment is leading the market. In the Advertising and Sponsorships segment of Japan's esports market, the growth of the audience and the highly engaged gaming audience is the main stimulator, which creates a promising opportunity for brands in need of reaching a specific range of consumers. As the viewership of esports has been growing, in particular, among the Gen Z and millennial demographics, esports investment has been rising among companies in a variety of industries, including consumer electronics, apparel, food and beverages, and automotive. Big Japanese publishers such as Capcom and big foreign players such as Riot Games are actively arranging high-calibre tournaments, which are creating premium sponsorship inventory. Also, YouTube, Twitch, and Mildom provide focused spaces for adverts during broadcasts of esports, enhancing brand auspiciousness. The emergence of influencer marketing (particularly esports streamers and VTubers) also helped this category to grow, so that advertisers can now connect with niche, loyal groups in more authentic ways.

Based on the Platform, the market is segmented into PC-based Esports, Console-based Esports, and Mobile and Tablet. Among these, Mobile and Tablets are the largest contributors to the Japanese e-sports industry. The most important motivator of the esports market in Japan's Mobile and tablet segment is the high prevalence of smartphone users and the growing popularity of mobile games that are accessible through smartphones. Titles such as PUBG Mobile, Arena of Valor, and Call of Duty Mobile have a huge fanbase, in specific the younger audience, and it is more convenient and accessible to play from portable devices. The fast-advancing mobile network and 5G upgrading in Japan have continued to increase the quality of mobile gaming experience, whereby users are provided with low-latency gaming and real-time multiplayer competition. Further, there has been a snowballing effect on the mobile esports tournaments in the grassroots and at the professional levels, which has been picking up with the supporting institutions being the publishers and the telecom providers. The freemium model of several mobile esports classes also appeals to a broad audience, which adds to the audience and in-game monetization, meaning that the mobile and tablet segment is rapidly developing in the

Japanese esports market.

Based on Games, the market is segmented into Multiplayer Online Battle Arena (MOBA), Shooter, MMORPG, Battle Royale, and Others. Among these, Multiplayer Online Battle Arena (MOBA) is the largest contributor to the Japanese e-sports industry. The main aspects of the Multiplayer Online Battle Arena (MOBA) sub-sector in Japan's esports industry are the significant strategic attributes and the high rate of interaction of the players, which can invite long-term game retention and competitive watching. The games like League of Legends and Mobile Legends: Bang Bang have created dedicated fans in Japan, using localised tournaments and influencer-based promotions. The dynamics of the MOBA games that are set up in teams have made them very appealing to pro esports, and thus, organizations can take advantage of this by building rosters and narratives that resonate with the fans. Moreover, the game experience develops, drawing the audience's attention while updating the content, releasing the heroes, and holding seasonal events; collaborations with streaming services and sponsors augment the MOBA segment's promotion and commercial value.

For a better understanding of the market adoption of Japan E-sports, the market is analyzed based on its presence in regions such as Kanto, Kansai, Chubu, and Others. Out of all the regions, the Kanto region dominated the market. The Kanto region (Tokyo and other great urban centres such as Yokohama and Chiba) happens to be the heart of Japan's esports ecosystem. The dominance of this country comes from a large presence of professional teams and event organizers, and tech that supports competitive gaming. The largest events in esports take place in Tokyo specifically, for example, the RED° Tokyo Tower and esports cafes of Akihabara hold regular tournaments and meetups for fans. The region has also benefited from the existence of top universities and digital infrastructure that has made it possible for the emergence of collegiate esports programs and startup accelerators in the region as well. Furthermore, numerous game developers and media companies are based in Kanto, making it easier to harmonize the sponsorship arrangements, media rights, and the releases of content. The region is the driving force of the esports market due to vibrant culture, a huge gamer population, and support for digital innovation from the government.

Some major players running in the market include Crazy Raccoon, Detonation FocusMe, ZETA DIVISION, CAPCOM, Bandai Namco Entertainment, Riot

Games Japan, Cygames, CyberZ/RAGE, YouTube Japan, and Twitch Japan.

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