

Smartphone Games Market in Japan: Key Research Findings 2015

◆ **Research Outline**

Yano Research Institute has conducted a study on the smartphone games market with the following conditions:

1. Research period: October 2015 to February 2016
2. Research target: Domestic leading smartphone game makers
3. Research methodologies: Face-to-face interviews by the specialized researchers, telephone/e-mail surveys, and literature research

What are Smartphone Games?

The smartphone games in this research indicate game application programs, namely native game applications or browser games, which can be played using smartphone devices.

What is the Smartphone Games Market?

Size of the smartphone games market in this research is calculated by totaling the payment billed to the users for smartphone games including the payment for the items that the users acquired in the games. No advertisement revenues included.

◆ **Key Findings**

■ **Domestic Smartphone Games Market Attained 895.0 billion Yen in FY2014, Remarkable 159.8% of Size in Previous Fiscal Year**

Size of the domestic smartphone games market, based on the sales amount at game makers, has grown to 895.0 billion yen in FY2014, remarkable 159.8% of the size of the previous fiscal year. Continuous popularity of the game applications, such as 'Puzzle & Dragons' released in 2012 and 'Monster Strike' released in 2013, have boosted the market. What was only 48 billion yen in FY2011, size of the smartphone games market has expanded immensely over the last four years.

■ **Smartphone Games Market Becoming Oligopolistic**

With the environment surrounding smartphone games changing at high speed, there is no denying that new games with innovative technique may keep on emerging one after another to attract users. However, the current environment requires the game makers to possess technological ability to develop the games for home video game consoles, as well as affordability to bear cost increase, secure human resources, and have multiple number of development lines, in order to prepare for lengthening development period, all of which can be attained by only a limited number of game makers able to cope with severe conditions and to provide attractive contents. Therefore, the market is likely to be oligopolistic.

■ **Domestic Smartphone Game Market Continues Steady Growth, Projected to Achieve 945.0 Billion Yen in FY2016**

Many home video game makers have shifted to develop smartphone games just as the largest enterprise of such game makers is scheduled to enter the domestic smartphone game market in

2016. They quickly gained popularity by making their existing game titles available to play on the smartphone devices. Therefore, the market has a sufficient environment to cover the potential loss whenever the fans of currently-popular applications decrease. Since steady growth is expected to continue, the domestic smartphone games market is likely to attain 945.0 billion yen, 102.2% of the size in the previous fiscal year.

◆ **Report format:**

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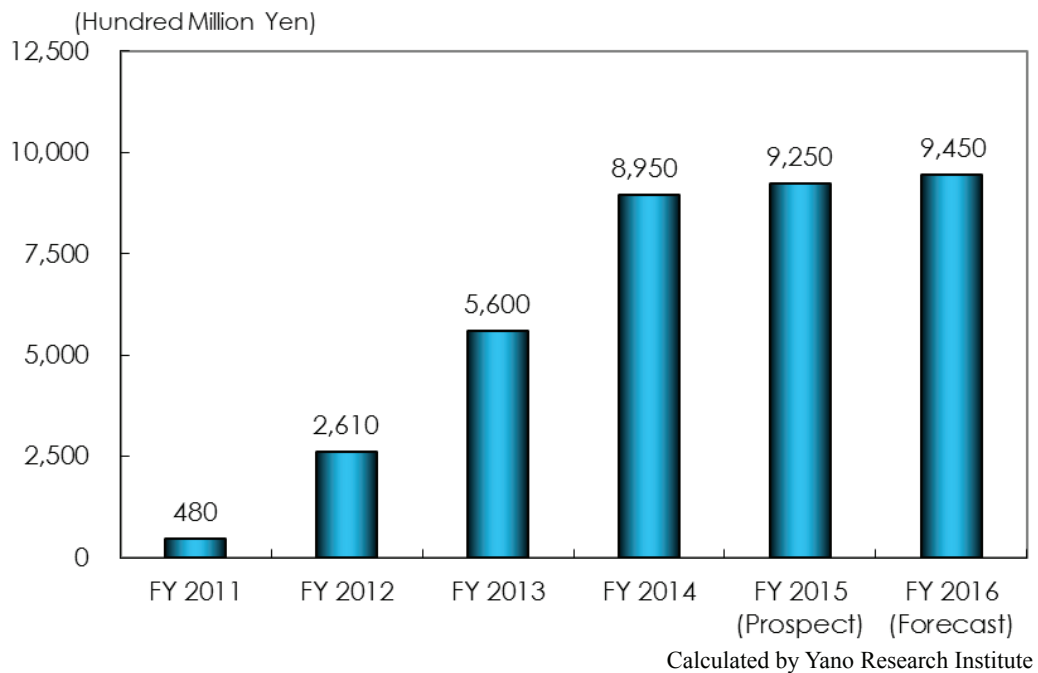
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■ **Figure 1: Transition and Forecast of Domestic Smartphone Games Market Size**



Notes:

1. The market size is based on the sales of the enterprises.
2. The figures in FY2015 and beyond are forecast.
3. Size of the smartphone games market in this research is calculated by totaling the payment billed to the users for smartphone games including the payment for the items that the users acquired in the games. No advertisement revenues included.