

To News Organizations and Journalists

Mobile Content Forum

The 2014 total for mobile content related markets was 3,904.6 billion yen.

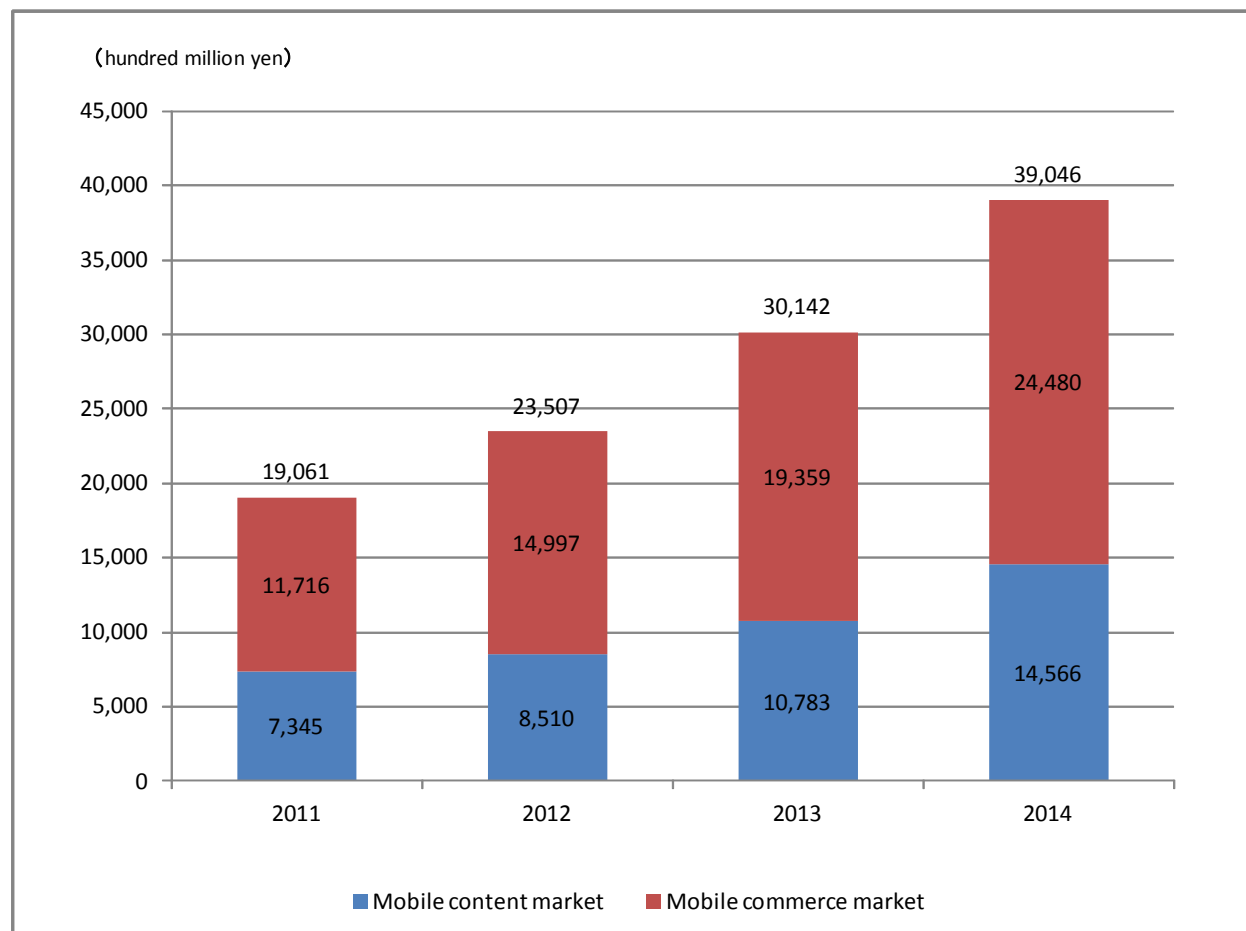
The mobile content market accounted for 1,456.6 billion yen.

The mobile commerce market accounted for 2,448.0 billion yen.

(Unit: hundred million yen)

Market category	2011	2012	2013	YOY	2014	YOY
Mobile content market	7,345	8,510	10,783	127%	14,566	135%
Mobile commerce market	11,716	14,997	19,359	129%	24,480	126%
Mobile content reralted market	19,061	23,507	30,142	128%	39,046	130%

Mobile Content Forum Survey



Mobile Content Forum (MCF) conducted market research regarding the mobile content-related market in 2014 (from January to December). We have announced the results of our mobile content-related market survey with regards to the "mobile content market", which consists of paid digital content such as games and music, and the "mobile commerce market", which consists of 3 segments including the shopping, services, and transaction segments. The total for the "mobile content-related market", combining both markets in 2014, was 3,904.6 billion yen for a positive year-on-year of 130%. Since the business model of the "mobile content market" is different, calculations were made to distinguish between the feature phone market and the smartphone market.

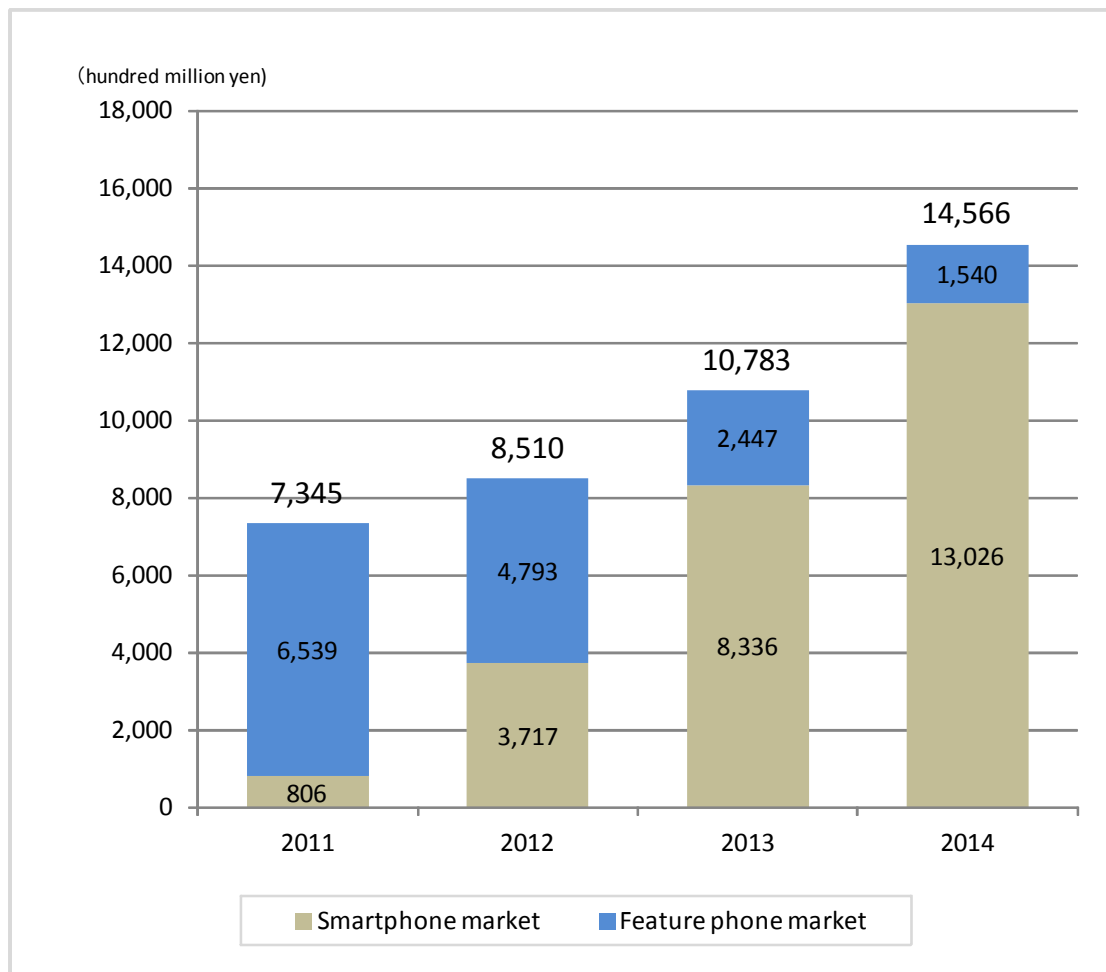
The mobile content market accounted for 1,456.6 billion yen in 2014.

The feature phone market accounted for 154.0 billion yen and the smartphone market accounted for 1,302.6 billion yen.

(Unit: hundred million yen)

	2011	2012	2013	YOY	2014	YOY
Feature phone market	6,539	4,793	2,447	51%	1,540	63%
Smartphone market	806	3,717	8,336	224%	13,026	156%
Mobile content market	7,345	8,510	10,783	127%	14,566	135%

Mobile Content Forum Survey



*1 Feature phones are defined as conventional mobile phones that can make use of IP services for mobile phones such as the i-mode. The feature phone market is defined as the market for selling digital content such as music and games, based on a main model representing carrier charges on an official website related to feature phones.

*2 Smartphones (including tablets) are defined as terminals that are Internet connectible open operating systems that can make general use via applications and Web browsers. The smartphone market is defined as the market for selling digital content (including applications) related to smartphones. Although game dedicated terminals, which can download game titles, and notebook PCs are capable of connecting to the Internet, they have not been included in this market.

Breakdown of the 2014 Feature Phone Market

The "social game market" accounted for 36.4 billion yen.

The "ringtone market" accounted for 9.5 billion yen, and the "chaku-uta market" accounted for 18.6 billion yen.

(Unit: hundred million yen)

	2011	2012	2013	YOY	2014	YOY
Ringtone market	287	200	135	68%	95	70%
Chaku-uta market	942	554	289	52%	186	64%
(Breakdown) Chaku-uta market	300	176	104	59%	66	63%
(Breakdown)Chaku-uta Full mar	642	378	185	49%	120	65%
Mobile game market	570	398	194	49%	112	58%
Decomail® market	213	128	58	45%	45	78%
E-book market	489	320	159	50%	99	62%
Ringback tone market	118	94	66	70%	61	92%
Horoscope market	180	122	71	58%	40	56%
Standby image market	172	108	50	46%	32	64%
Kisekae tool market	103	54	22	41%	17	77%
Weather/news market *1	140	120	84	70%	73	87%
Traffic information market *2	217	160	114	71%	86	75%
Lifestyle information market *3	168	159	55	35%	24	44%
Avatar/item sales (SNS, etc.) *4	2,078	1,888	770	41%	364	47%
Mobile video *5	176	93	40	43%	24	60%
Arts/entertainment *6	242	103	85	83%	44	52%
Media/information *7	54	37	20	54%	11	55%
Other mobile content market	390	255	235	92%	227	97%
Feature phone market totals	6,593	4,793	2,447	51%	1,540	63%

Mobile Content Forum Survey

*1 The weather/news market refers to news services such as weather information, current events, and financial information.

*2 The traffic information market refers to traffic information services such as searching navigation, map information, and station transfer information.

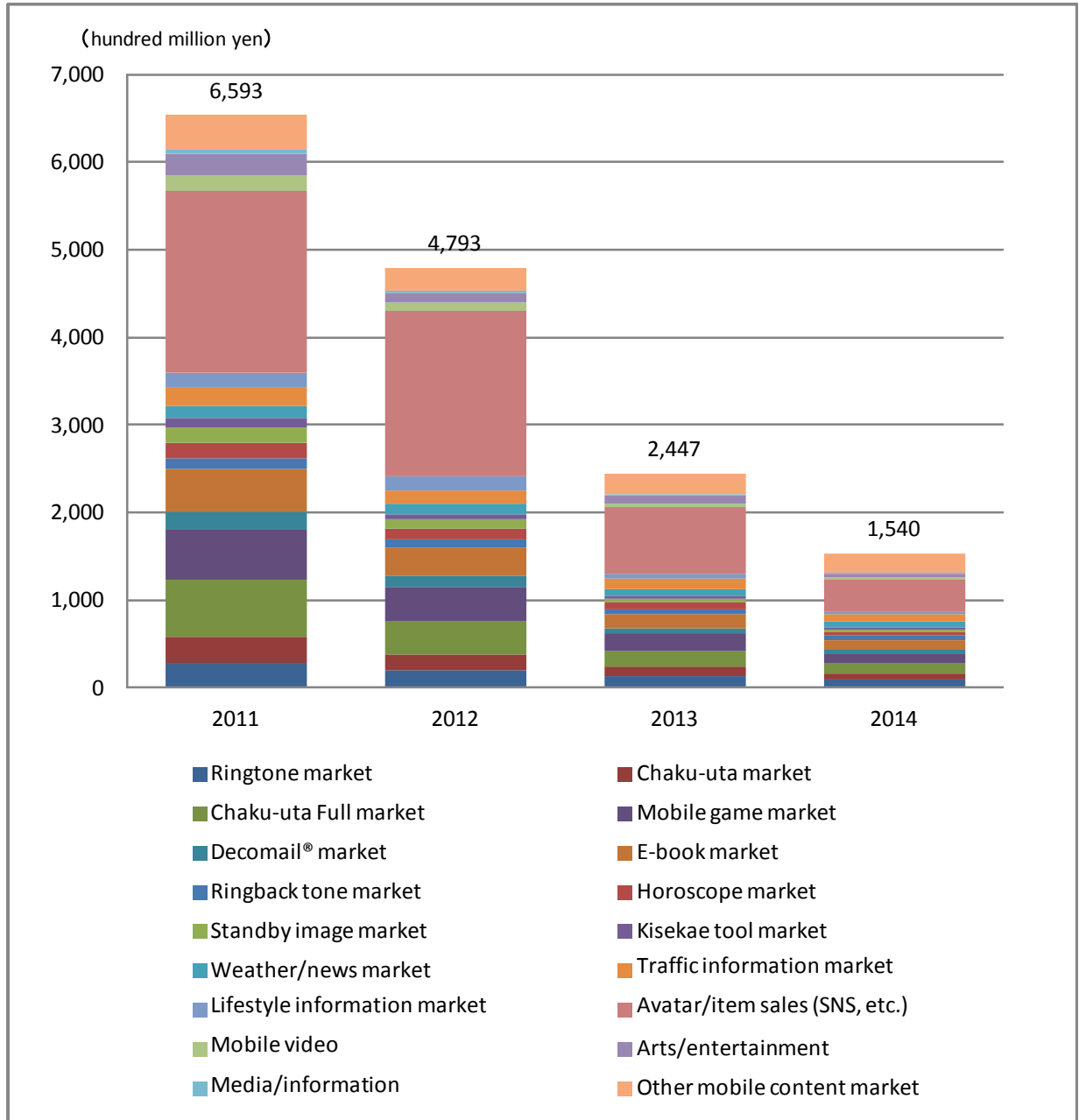
*4 The social game market had its name changed in 2011 from "avatar/item selling (SNS, etc.)" to the "social game market". This includes digital tools that can be bought such as SNS related charges, avatars, and other items.

*5 The video dedicated market refers to websites that exclusively provide video content.

*6 The arts and entertainment market refers to entertainment related productions that provide artist information, entertainment news, movie information, etc.

*7 The media and information related market refers to program and magazine related information operated by television and radio broadcasters as well as publishing companies.

Feature phone market



Breakdown of the 2014 smartphone market

The "game and social game market" accounted for 893.8 billion yen.

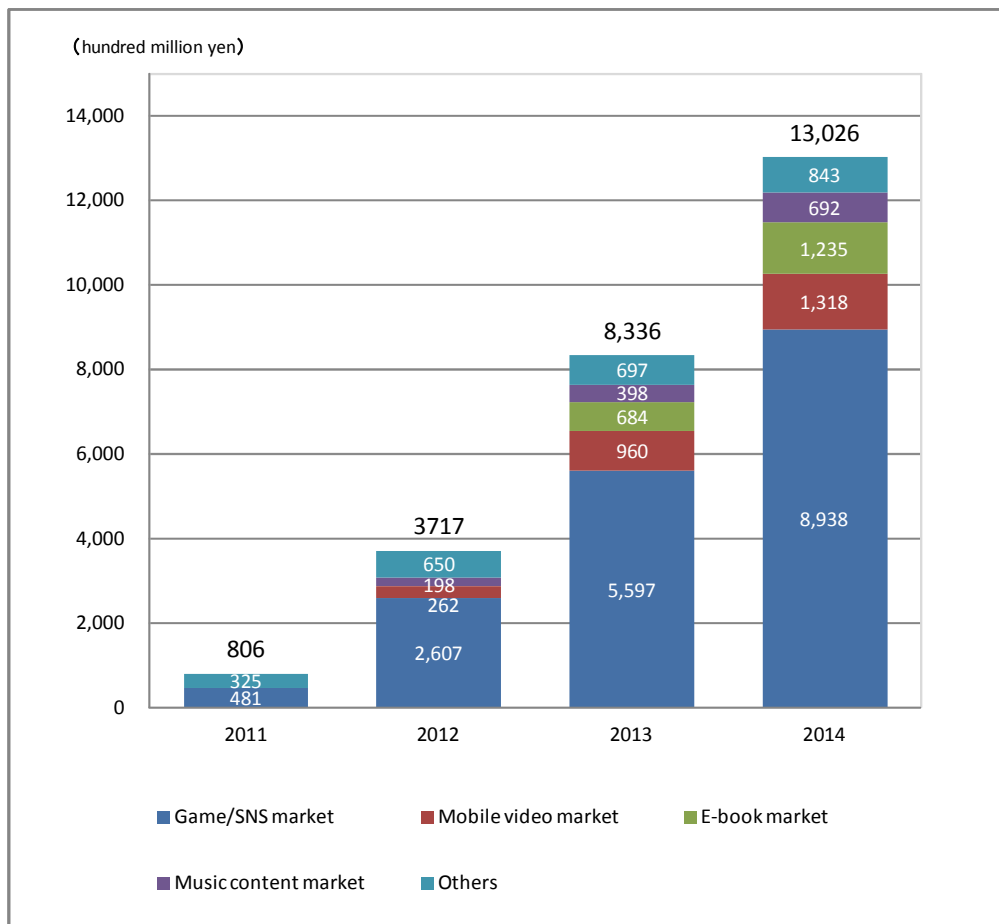
The "Mobile video market" accounted for 131.8 billion yen, and the "E-book market" accounted for 123.5 billion yen.

The "music content market" accounted for 69.2 billion yen.

(Unit: hundred million yen)

	2011	2012	2013	YOY	2014	YOY
Game/SNS market *1	481	2,607	5,597	215%	8,938	160%
Mobile video market *2	-	262	960	366%	1,318	137%
E-book market *3	-	-	684	-	1,235	181%
Music content market *4	-	198	398	201%	692	174%
Others	325	650	697	107%	843	121%
Smartphone market totals	806	3,717	8,336	224%	13,026	156%

Mobile Content Forum Survey



*1 The "Game and social game market" refers to online games and paid content provided by SNS, etc. This includes digital tools that can be bought such as avatars, and other items.

*2 The "Mobile video market" refers to paid video and movie content that can be used on smartphones, etc.

*3 The "E-book market" refers to e-book content that can be used on smartphones, etc.

*4 The "Music content market" refers to paid music content that can be used on smartphones, etc.

The market scale of the "mobile content market" in 2014 was 1456.6 billion yen, which is up, providing a year-on-year increase of 135%. The market scale includes calculation divided between the feature phone market, which is the market for selling digital content such as music and games, based on a main model representing carrier charges on an official website related to feature phones, and the smartphone market, which is the market for selling digital content (including applications) related to smartphones.

Among the figures for the market, the "feature phone market" accounted for 154.0 billion, shrank rapidly at only 63% of the previous year's figures. On the other hand, the "smartphone market" experienced quick growth at 1,302.6 billion yen for year-on-year growth of 156%

Looking at the breakdown of the content, all genres in the "feature phone market" are indicating a downward trend. In contrast to this, all genres in the "smartphone market " are indicating an upward trend. The "Game and social game market" in the "

smartphone market" accounted for 69% of the whole market, providing for 893.8 billion yen. And, the "Mobile video market" and the "Music content market", accounted for 131.8 billion yen and 692.0 billion yen respectively. In addition, the "E-book market" accounted for 123.5 billion yen.

The mobile commerce market accounted for 2,448.0 billion yen in 2014.

"Shopping" accounted for 1,341.4 billion yen.

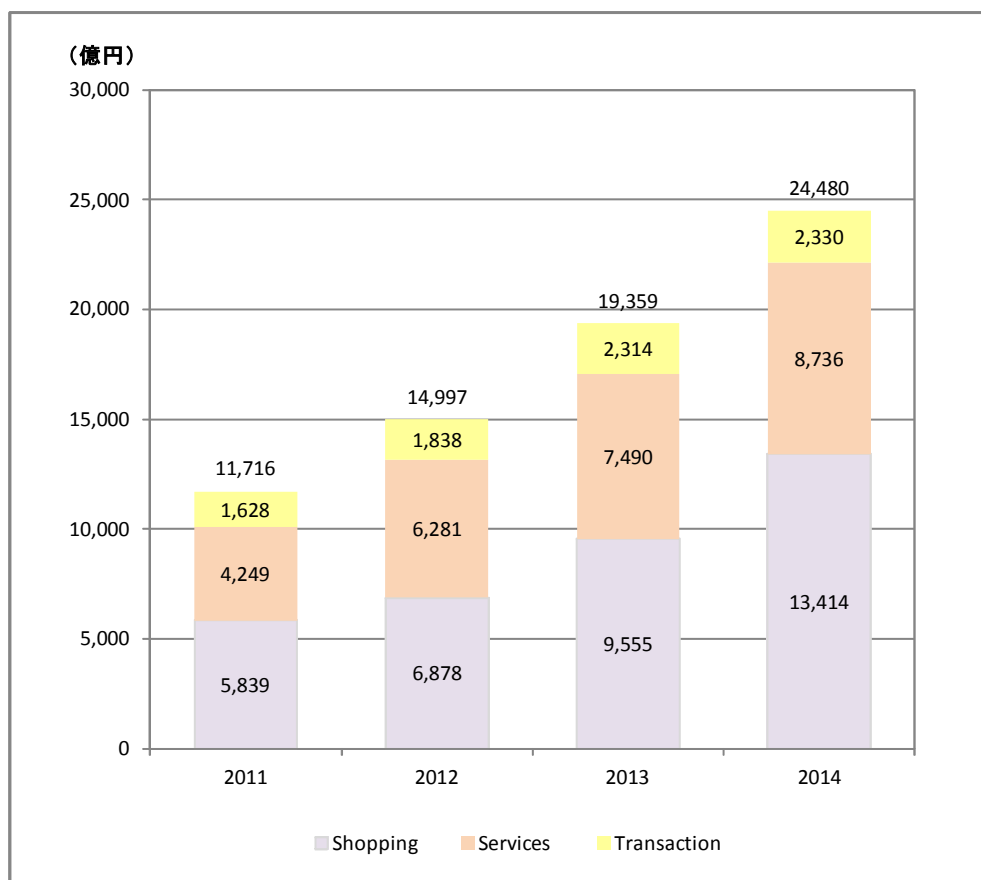
"Services" accounted for 873.6 billion yen.

"Transaction" accounted for 233.0 billion yen.

(Unit: hundred million yen)

	2011	2012	2013	YOY	2014	YOY
Shopping	5,839	6,878	9,555	139%	13,414	140%
Services	4,249	6,281	7,490	119%	8,736	117%
Transaction	1,628	1,838	2,314	126%	2,330	101%
Mobile commerce market totals	11,716	14,997	19,359	129%	24,480	126%

*Mobile Content Forum Survey



The "mobile commerce market" is divided into 3 category segments including the "shopping market" (market targeting general mail order shopping), the "services market" (market targeting performance tickets, travel tickets, airline tickets, train tickets, etc.), and the "transaction market" (market targeting securities transaction fees, auction transaction fees, public competition transaction fees, etc.). The "mobile commerce market", by combining the 3 segments" accounted for 2,448.0 billion yen for a year-on-year of 126%.

The "shopping market" for purchasing products accounted for 1,341.4 billion yen, providing a year-on-year of 140%. The "services market" accounted for 873.6 billion yen for a year-on-year of 117%. The "transaction market" accounted for 233.0 billion yen for a year-on-year of 101%

The mobile commerce market combines the totals of the feature phone and smartphone market.

◆Mobile Content Forum (abbreviated name: MCF)

Mobile Content Forum was established as an industry association consisting of businesses related to mobile content delivery services in order to further activate the mobile content environment. In order to support the healthy development of mobile content related industries, we aim at achieving co-existence and co-prosperity with society as it builds smooth relationships between consumers and relevant organizations. It is our mission to support the activities of our members and the industry. We have a membership of 145 companies (as of August 2015), most of whom are content providers.

Inquiries regarding this release

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