

To News Organizations and Journalists

Mobile Content Forum

The 2022 total for mobile content related markets was 8,522 billion yen.

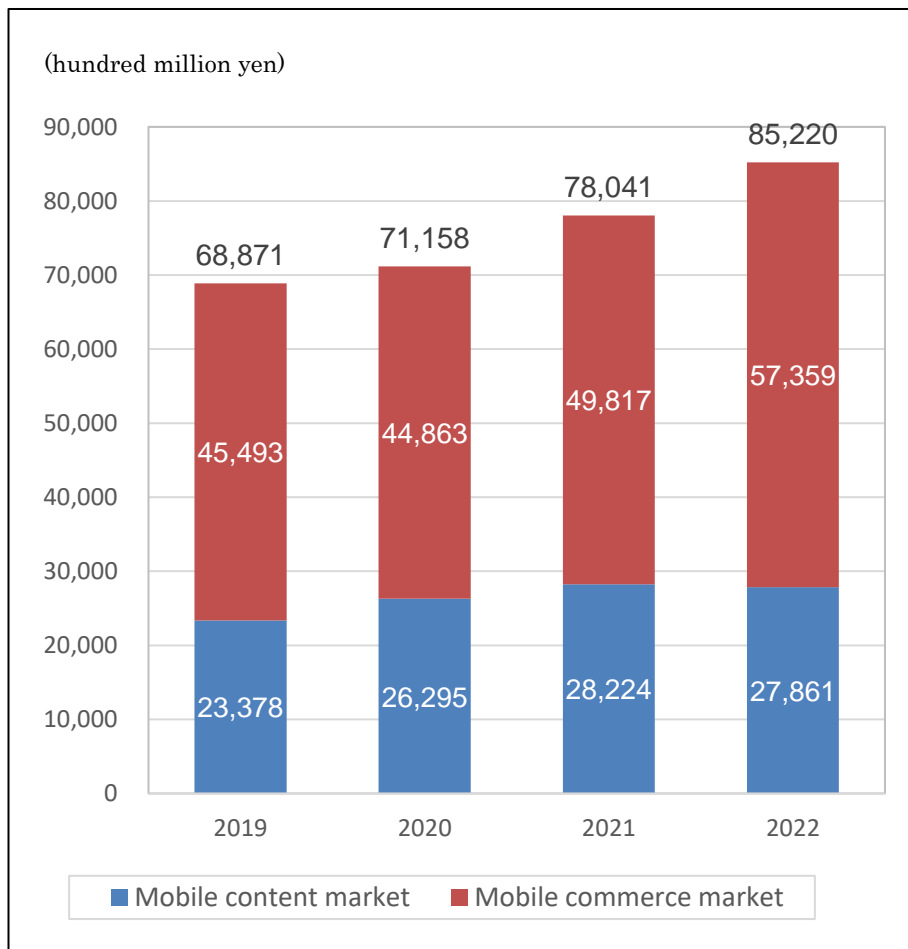
The mobile content market accounted for 2,786.1billion yen.

The mobile commerce market accounted for 5,735.9 billion yen.

(Unit: hundred million yen)

Market category	2019	2020	2021	YOY	2022	YOY
Mobile content market	23,378	26,295	28,224	107%	27,861	99%
Mobile commerce market	45,493	44,863	49,817	111%	57,359	115%
Mobile content related market	68,871	71,158	78,041	110%	85,220	109%

Mobile Content Forum Survey



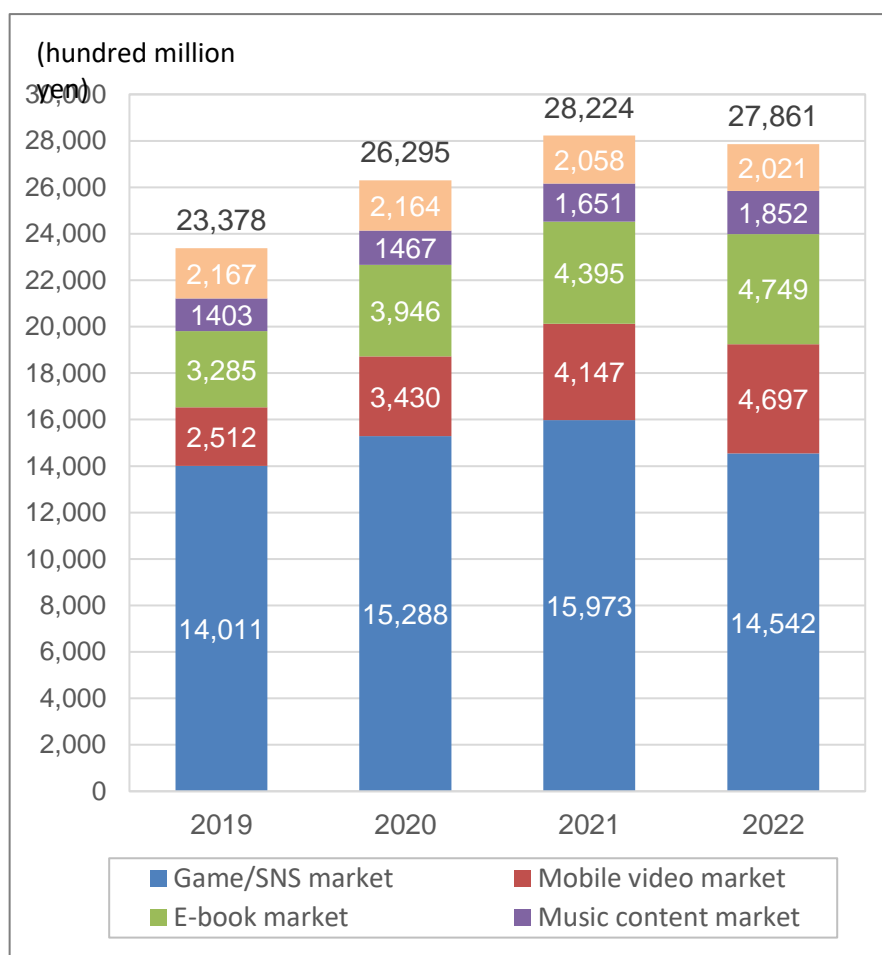
Mobile Content Forum (MCF) conducted market research regarding the mobile content-related market in 2022 (from January to December). We have announced the results of our mobile content-related market survey with regards to the "mobile content market", which consists of paid digital content such as games 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 2022, was 8,522 billion yen for a positive year-on-year of 109%.

The mobile content market accounted for 2,786.1 billion yen in 2022
The "game and social game market" accounted for 1,454.2 billion yen.
The "Mobile video market" accounted for 469.7 billion yen, and the "E-book market" accounted for 474.9 billion yen.
The "music content market" accounted for 185.2 billion yen.

(Unit: hundred million yen)

	2019	2020	2021	YOY	2022	YOY
Game/SNS market *1	14,011	15,288	15,973	104%	14,542	91%
Mobile video market *2	2,512	3,430	4,147	121%	4,697	113%
E-book market *3	3,285	3,946	4,395	111%	4,749	108%
Music content market *4	1,403	1,467	1,651	113%	1,852	112%
Others	2,167	2,164	2,058	95%	2,021	98%
Smartphone market totals	23,378	26,295	28,224	107%	27,861	99%

Mobile Content Forum Survey



* Due to the discontinuation of feature phone services, starting from 2022, only the smartphone market will be accounted for.

*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 size of the "mobile content market" in 2022 was 2,786.1 billion yen, 99% of that of the previous year. This market covers sales of smartphones and other devices. The market for smartphones, etc. is defined as the market for smartphones, etc. (including tablets), which are devices that can be used for general purposes using applications, browsers, etc. on an open OS with Internet access, and the market for digital content for smartphones, etc. is defined as the mobile content market (the "mobile content market"). The market for digital content for smartphones and other devices is defined as the mobile content market (the smartphone market only from 2022 due to the termination of feature phone content services). Looking at the breakdown of the overall "mobile content market" by category, the "game and social game market, etc." continues to account for the majority of the market, at 1.4542 trillion yen.

The mobile commerce market accounted for 5,735.9 billion yen in 2022.

"Shopping" accounted for 3,397 billion yen.

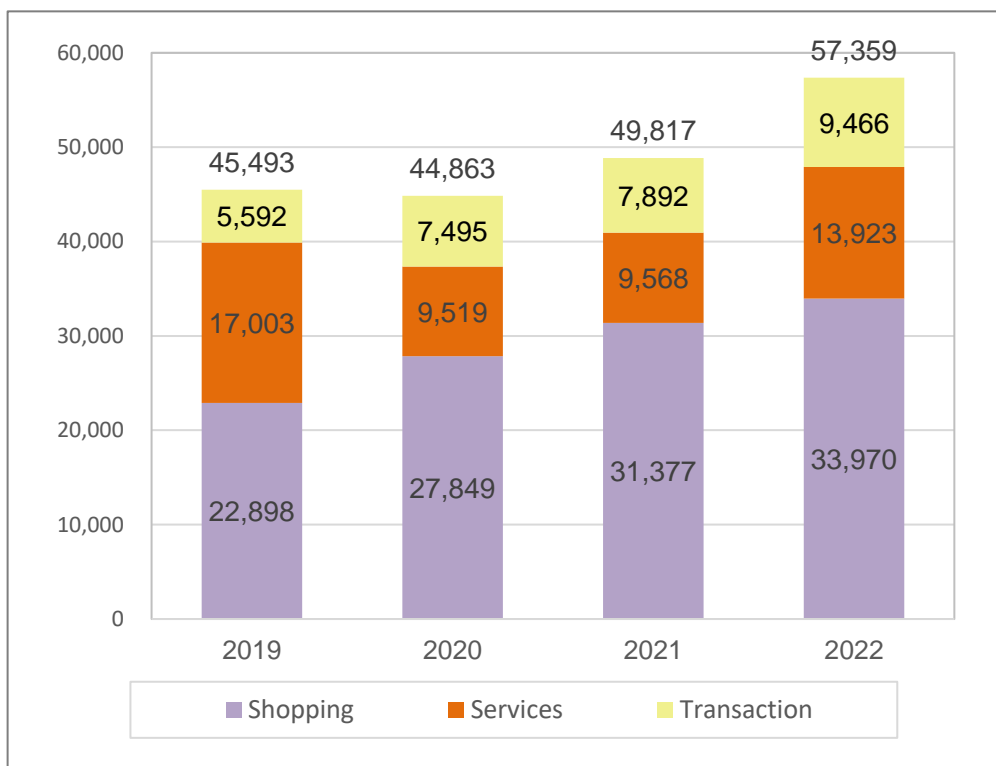
"Services" accounted for 1,392.3 billion yen.

"Transaction" accounted for 946.6 billion yen.

(Unit: hundred million yen)

	2019	2020	2021	YOY	2022	YOY
Shopping	22,898	27,849	31,377	113%	33,970	108%
Services	17,003	9,519	9,568	101%	13,923	146%
Transaction	5,592	7,495	7,892	105%	9,466	120%
Mobile commerce market totals	45,493	44,863	49,817	111%	57,359	115%

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 5,735.9 billion yen for a year-on-year of 115%.

The "shopping market" for purchasing products accounted for 3,397 billion yen, providing a year-on-year of 108%. The "services market" accounted for 1,392.3 billion yen for a year-on-year of 146%. The "transaction market" accounted for 946.6 billion yen for a year-on-year of 107%

. The "transaction market" market size has been revised retroactively to 2021 to reflect the addition

of QR code payment fees to the scope of the survey.

◆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 80 companies (as of June 2023), most of whom are content providers.

Inquiries regarding this release

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