

To News Organizations and Journalists

Mobile Content Forum

The 2024 total for mobile content related markets was 10,480.3 billion yen.

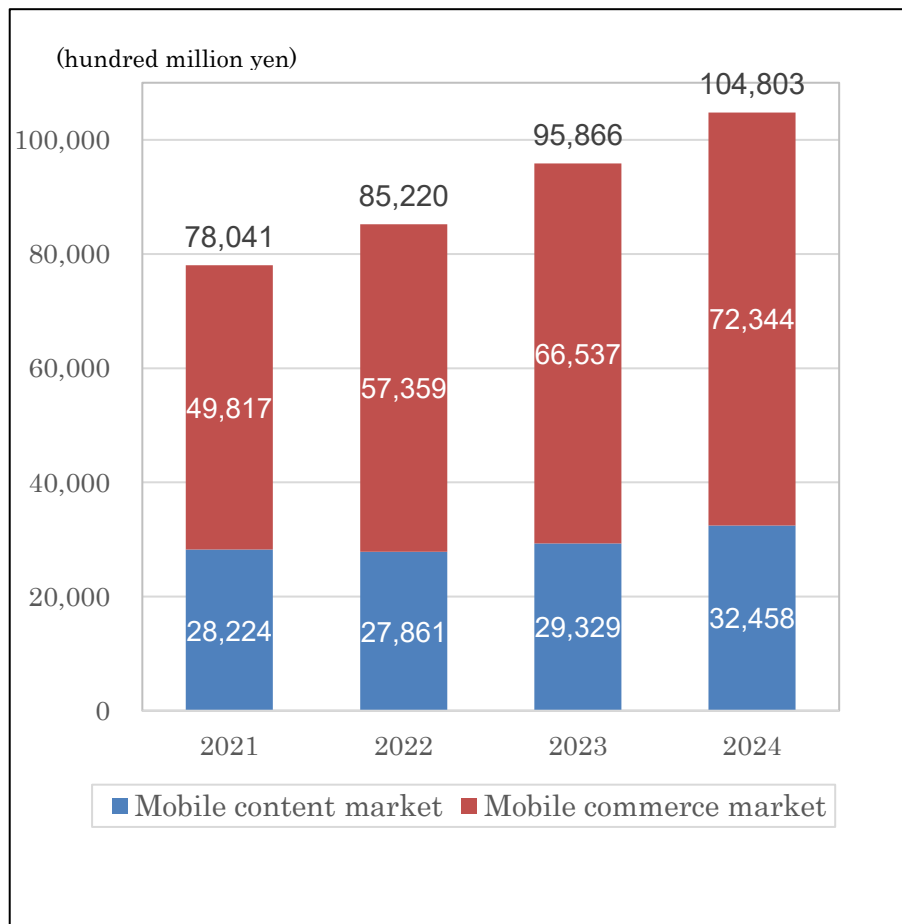
The mobile content market accounted for 3,245.8 billion yen.

The mobile commerce market accounted for 7,234.4 billion yen.

(Unit: hundred million yen)

Market category	2021	2022	2023	YOY	2024	YOY
Mobile content market	28,224	27,861	29,329	105%	32,458	111%
Mobile commerce market	49,817	57,359	66,537	116%	72,344	109%
Mobile content related market	78,041	85,220	95,866	112%	104,803	109%

Mobile Content Forum Survey



Mobile Content Forum (MCF) conducted market research regarding the mobile content-related market in 2024 (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 2024, was 10,480.3billion yen for a positive year-on-year of 109%.

The mobile content market accounted for 3,245.8 billion yen in 2024.

The "game and social game market" accounted for 1,629.6 billion yen.

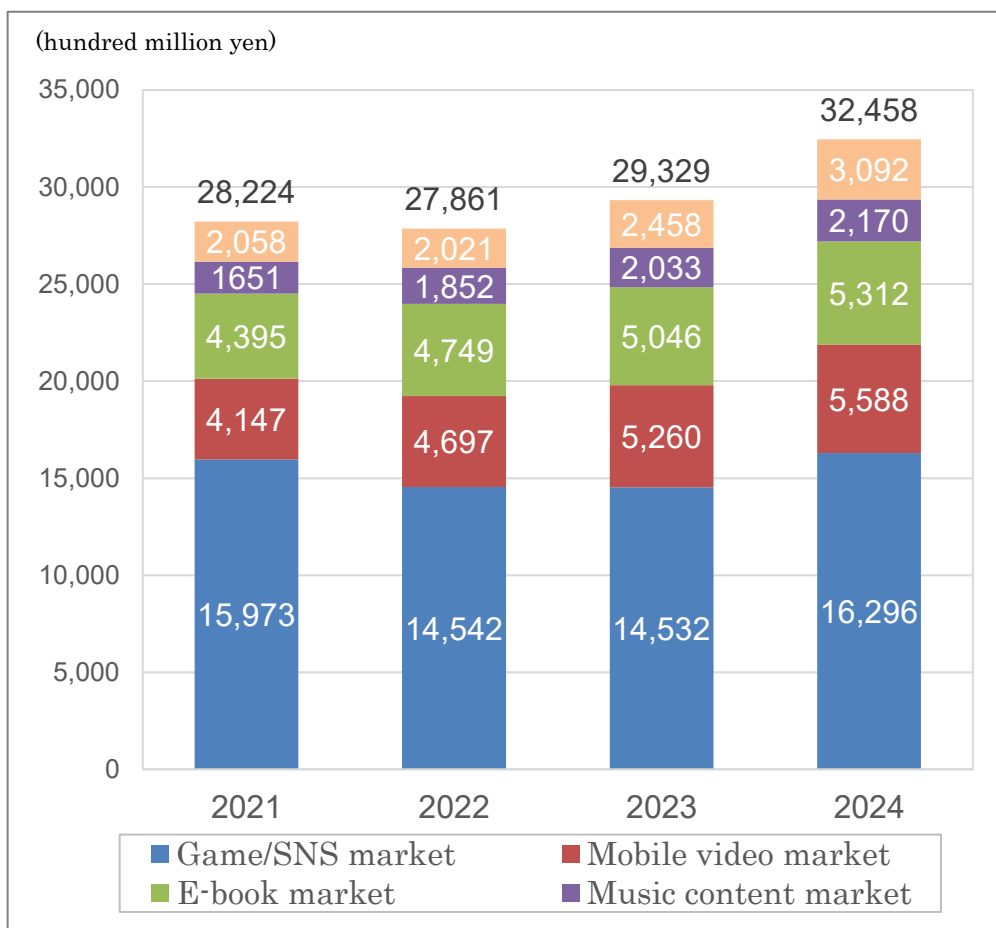
The "Mobile video market" accounted for 558.8 billion yen, and the "E-book market" accounted for 531.2 billion yen.

The "music content market" accounted for 217.0 billion yen.

(Unit: hundred million yen)

	2021	2022	2023	YOY	2024	YOY
Game/SNS market *1	15,973	14,542	14,532	100%	16,296	112%
Mobile video market *2	4,147	4,697	5,260	112%	5,588	106%
E-book market *3	4,395	4,749	5,046	106%	5,312	105%
Music content market *4	1,651	1,852	2,033	110%	2,170	107%
Others	2,058	2,021	2,458	122%	3,092	126%
Smartphone market totals	28,224	27,861	29,329	105%	32,458	111%

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 2024 was 3,245.8 billion yen, 111% 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 overall "mobile content market" by category, the "game and social game market, etc." continues to account for the majority of the market, at 1,629.6 billion yen.

The mobile commerce market accounted for 7,234.4 billion yen in 2024.

"Shopping" accounted for 4,055.0 billion yen.

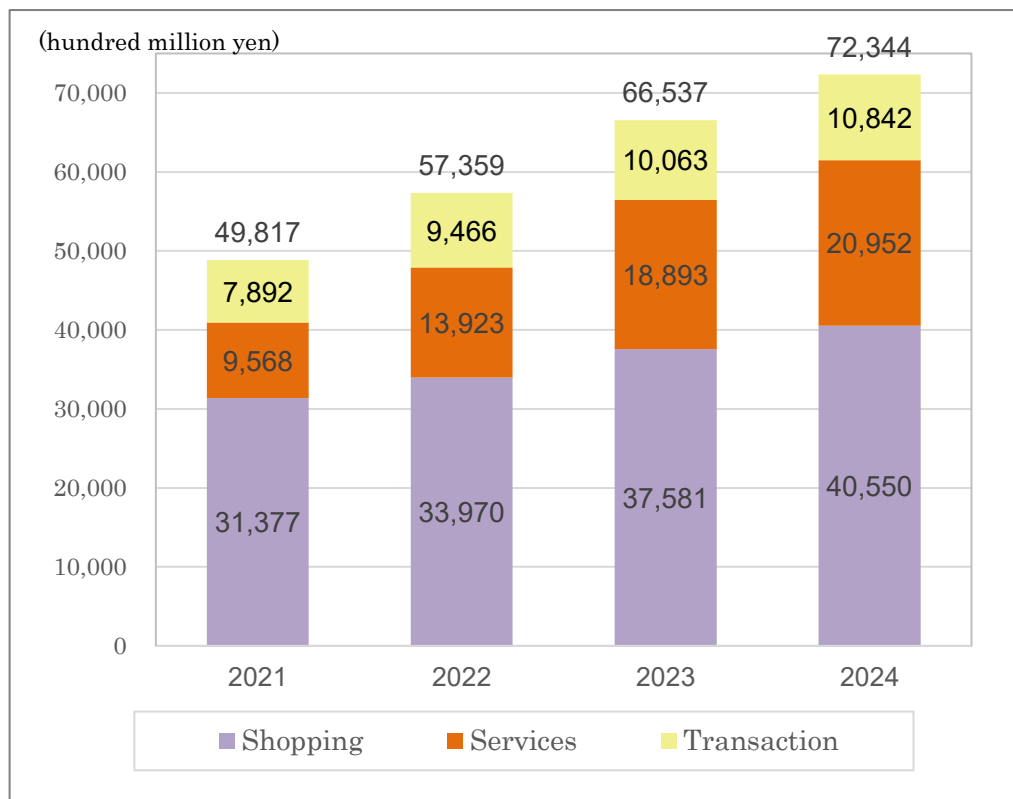
"Services" accounted for 2,095.2 billion yen.

"Transaction" accounted for 1,084.2 billion yen.

(Unit: hundred million yen)

	2021	2022	2023	YOY	2024	YOY
Shopping	31,377	33,970	37,581	111%	40,550	108%
Services	9,568	13,923	18,893	136%	20,952	111%
Transaction	7,892	9,466	10,063	106%	10,842	108%
Mobile commerce market totals	49,817	57,359	66,537	116%	72,344	109%

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 7,234.4 billion yen for a year-on-year of 109%.

The "shopping market" for purchasing products accounted for 4,055.0 billion yen, providing a year-on-year of 108%. The "services market" accounted for 2,095.2 billion yen for a year-on-year of 111%.

The "transaction market" accounted for 1,084.2 billion yen for a year-on-year of 109%.

. 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 75 companies (as of July 2025), most of whom are content providers.

Inquiries regarding this release

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