

To News Organizations and Journalists

Mobile Content Forum

**The 2018 total for mobile content related markets was 6,220.2 billion yen.**

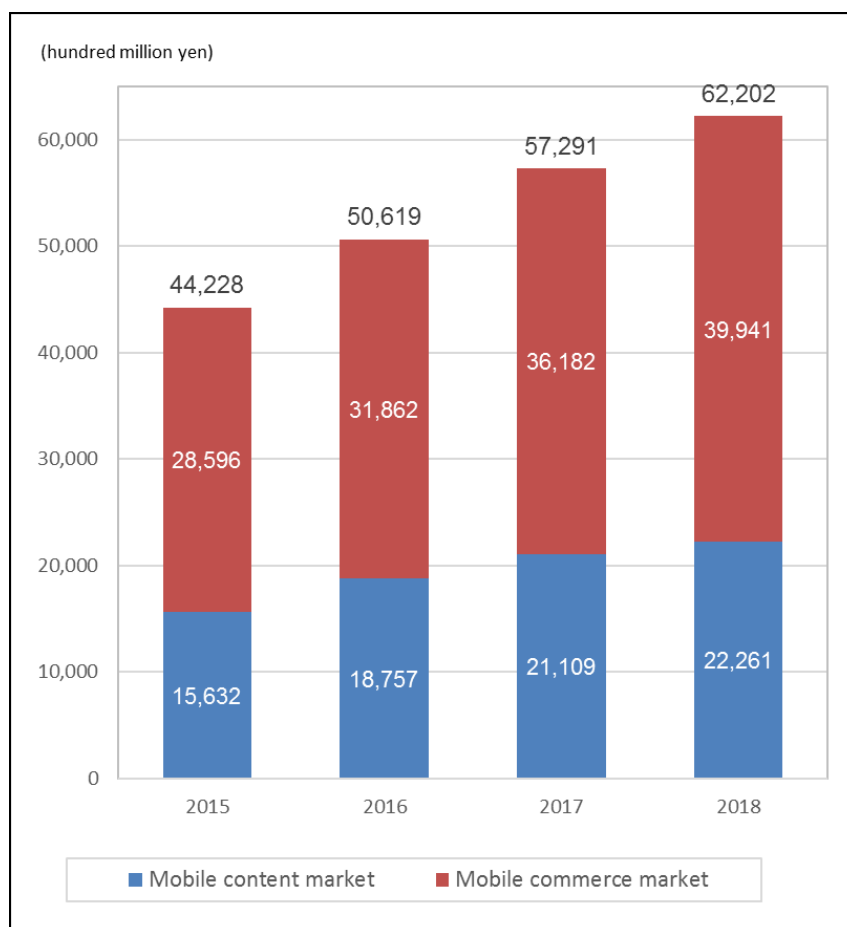
**The mobile content market accounted for 2,261.0 billion yen.**

**The mobile commerce market accounted for 3,994.1 billion yen.**

(Unit: hundred million yen)

Market category	2015	2016	2017	YOY	2018	YOY
Mobile content market	15,632	18,757	21,109	113%	22,261	105%
Mobile commerce market	28,596	31,862	36,182	114%	39,941	110%
Mobile content related market	44,228	50,619	57,291	113%	62,202	109%

Mobile Content Forum Survey



Mobile Content Forum (MCF) conducted market research regarding the mobile content-related market in 2018 (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 2018, was 6,220.2 billion yen for a positive year-on-year of 109%. 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.

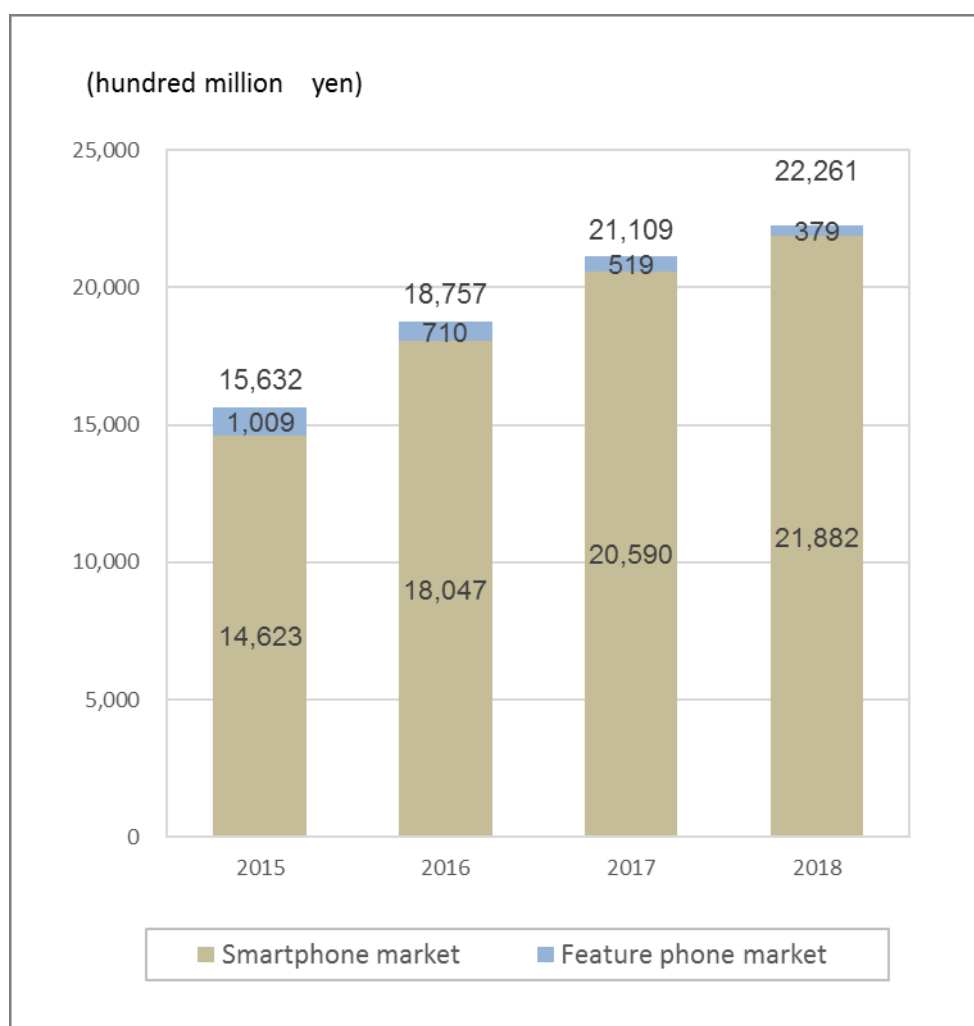
**The mobile content market accounted for 2,226.1 billion yen in 2018.**

**The feature phone market accounted for 37.9 billion yen and the smartphone market accounted for 2,188.2 billion yen.**

(Unit: hundred million yen)

	2015	2016	2017	YOY	2018	YOY
Smartphone market *1	14,623	18,047	20,590	114%	21,882	106%
Feature phone market *2	1,009	710	519	73%	379	73%
Mobile content market	15,632	18,757	21,109	113%	22,261	105%

Mobile Content Forum Survey



\*1 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.

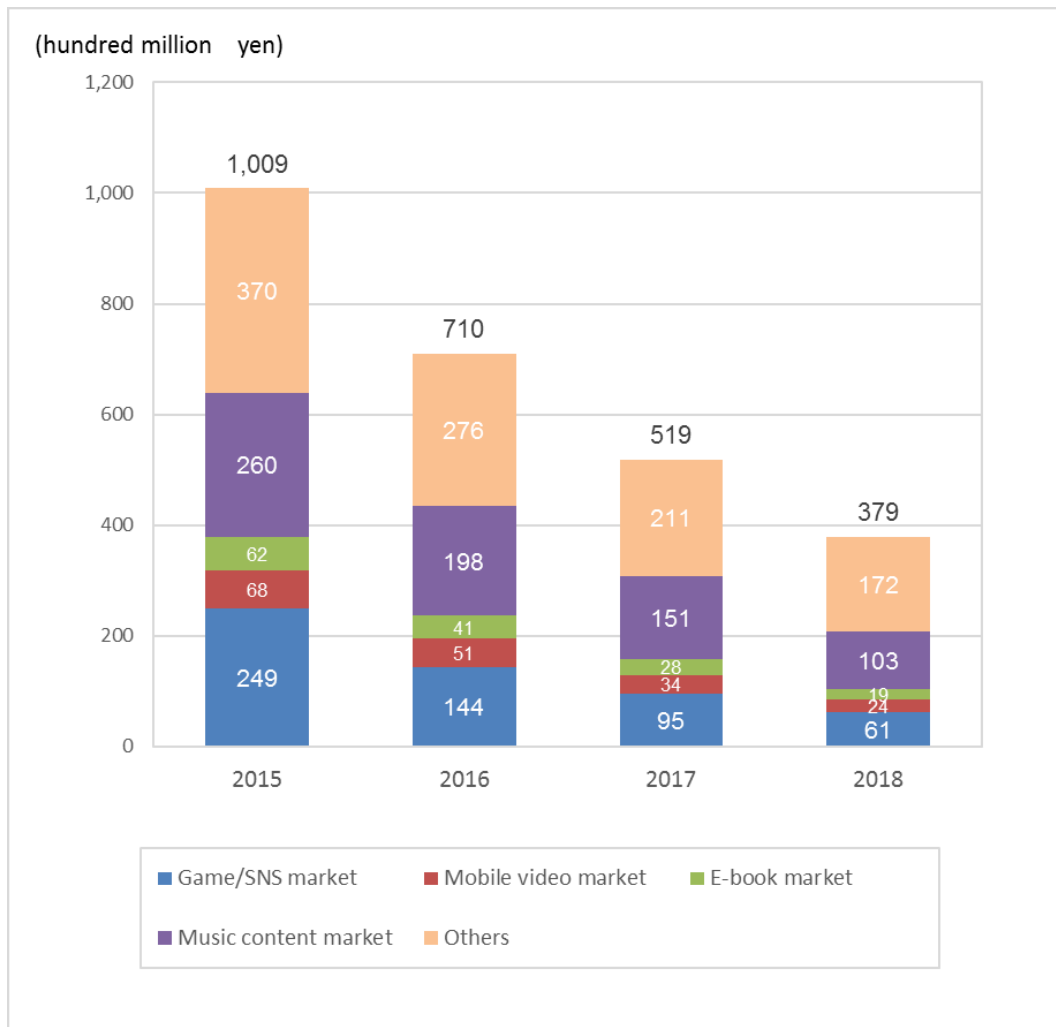
\*2 Feature phones are defined as conventional mobile phones that can make use of IP services for mobile phones such as the i-mode. The feature phone market is defined as the market for selling digital content such as music and games, based on a main model representing carrier charges on an official website related to feature phones.

## Breakdown of the 2018 Feature Phone Market

(Unit: hundred million yen)

	2015	2016	2017	YOY	2018	YOY
Game/SNS market *1	249	144	95	58%	61	64%
Mobile video market *2	68	51	34	75%	24	71%
E-book market *3	62	41	28	66%	19	68%
Music content market *4	260	198	151	76%	103	68%
Others	370	276	211	75%	172	82%
Feature Phone market totals	1,009	710	519	73%	379	73%

### 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.

**Breakdown of the 2018 smartphone market**

**The "game and social game market" accounted for 1,411.6 billion yen.**

**The "Mobile video market" accounted for 199.7 billion yen, and the "E-book market" accounted for 268.4 billion yen.**

**The "music content market" accounted for 115.2 billion yen.**

(Unit: hundred million yen)

	2015	2016	2017	YOY	2018	YOY
Game/SNS market *1	9,628	11,836	13,632	115%	14,116	104%
Mobile video market *2	1,460	1,651	1,859	113%	1,997	107%
E-book market *3	1,622	2,062	2,419	117%	2,684	111%
Music content market *4	799	939	1,033	110%	1,152	112%
Others	1,114	1,559	1,647	106%	1,933	117%
Smartphone market totals	14,623	18,047	20,590	114%	21,882	106%

**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 2018 was 2,226.1 billion yen, which is up, providing a year-on-year increase of 105%. 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 "smartphone market" experienced growth that 2,188.2 billion yen for year-on-year growth of 106%. On the other hand, the "feature phone market" accounted for 37.9 billion, shrank at only 73% of the previous year's figures. 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 64.5% of the whole market, providing for 1,411.6 billion yen. And, the "Mobile video market" and the "Music content market", accounted for 199.7 billion yen and 115.2 billion yen respectively. In addition, the "E-book market" accounted for 268.4 billion yen.

**The mobile commerce market accounted for 3,994.1 billion yen in 2018.**

**"Shopping" accounted for 2,043.8 billion yen.**

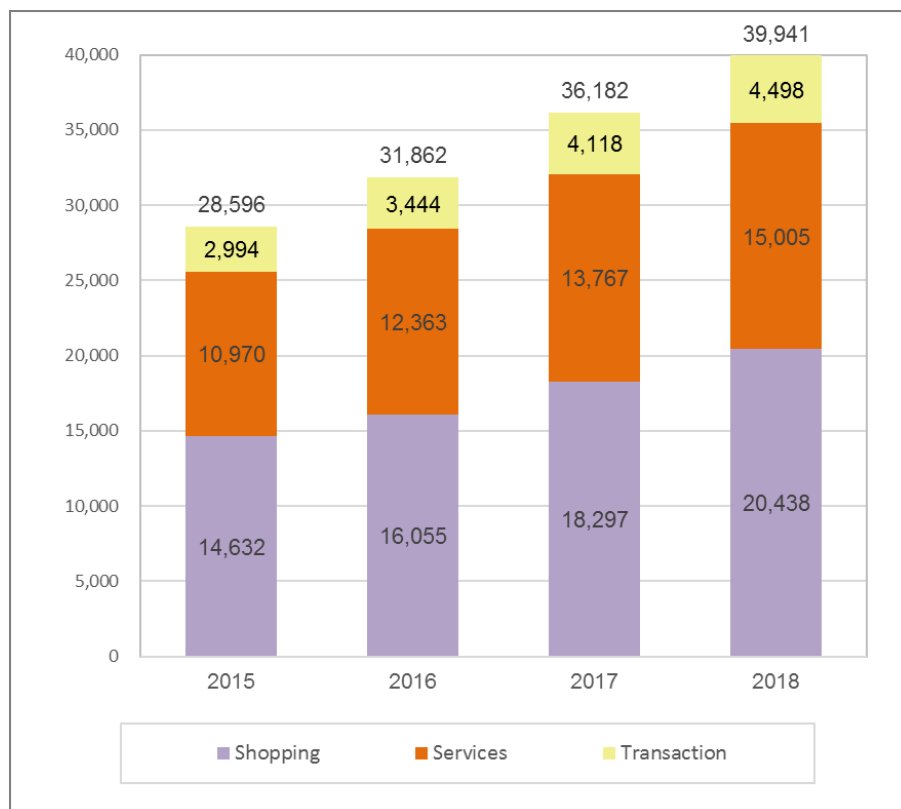
**"Services" accounted for 1,500.5 billion yen.**

**"Transaction" accounted for 449.8 billion yen.**

(Unit: hundred million yen)

	2015	2016	2017	YOY	2018	YOY
Shopping	14,632	16,055	18,297	114%	20,438	112%
Services	10,970	12,363	13,767	111%	15,005	109%
Transaction	2,994	3,444	4,118	120%	4,498	109%
Mobile commerce market totals	28,596	31,862	36,182	114%	39,941	110%

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 3,994.1 billion yen for a year-on-year of 110%.

The "shopping market" for purchasing products accounted for 2,043.8 billion yen, providing a year-on-year of 112%. The "services market" accounted for 1,500.5 billion yen for a year-on-year of 109%. The "transaction market" accounted for 449.8 billion yen for a year-on-year of 109%

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 101 companies (as of August 2019), most of whom are content providers.

Inquiries regarding this release

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