

To News Organizations and Journalists

Mobile Content Forum

The 2019 total for mobile content related markets was 6,887.1 billion yen.

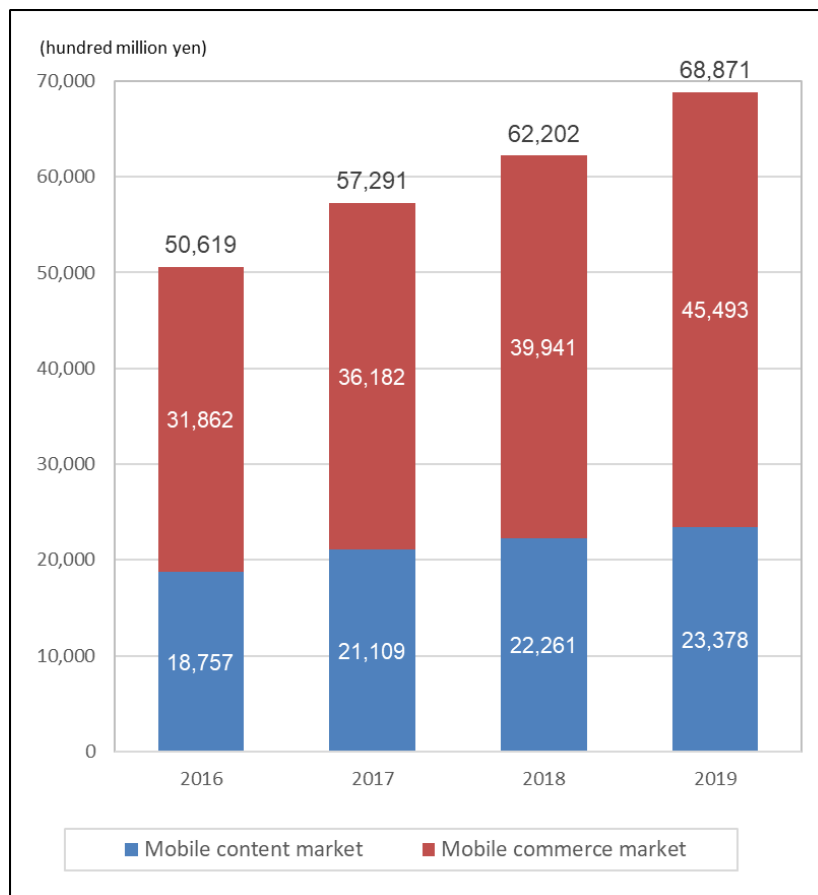
The mobile content market accounted for 2,337.8 billion yen.

The mobile commerce market accounted for 4,549.3 billion yen.

(Unit: hundred million yen)

Market category	2016	2017	2018	YOY	2019	YOY
Mobile content market	18,757	21,109	22,261	105%	23,378	105%
Mobile commerce market	31,862	36,182	39,941	110%	45,493	114%
Mobile content related market	50,619	57,291	62,202	109%	68,871	111%

Mobile Content Forum Survey



Mobile Content Forum (MCF) conducted market research regarding the mobile content-related market in 2019 (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 2019, was 6,887.1 billion yen for a positive year-on-year of 111%. 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.

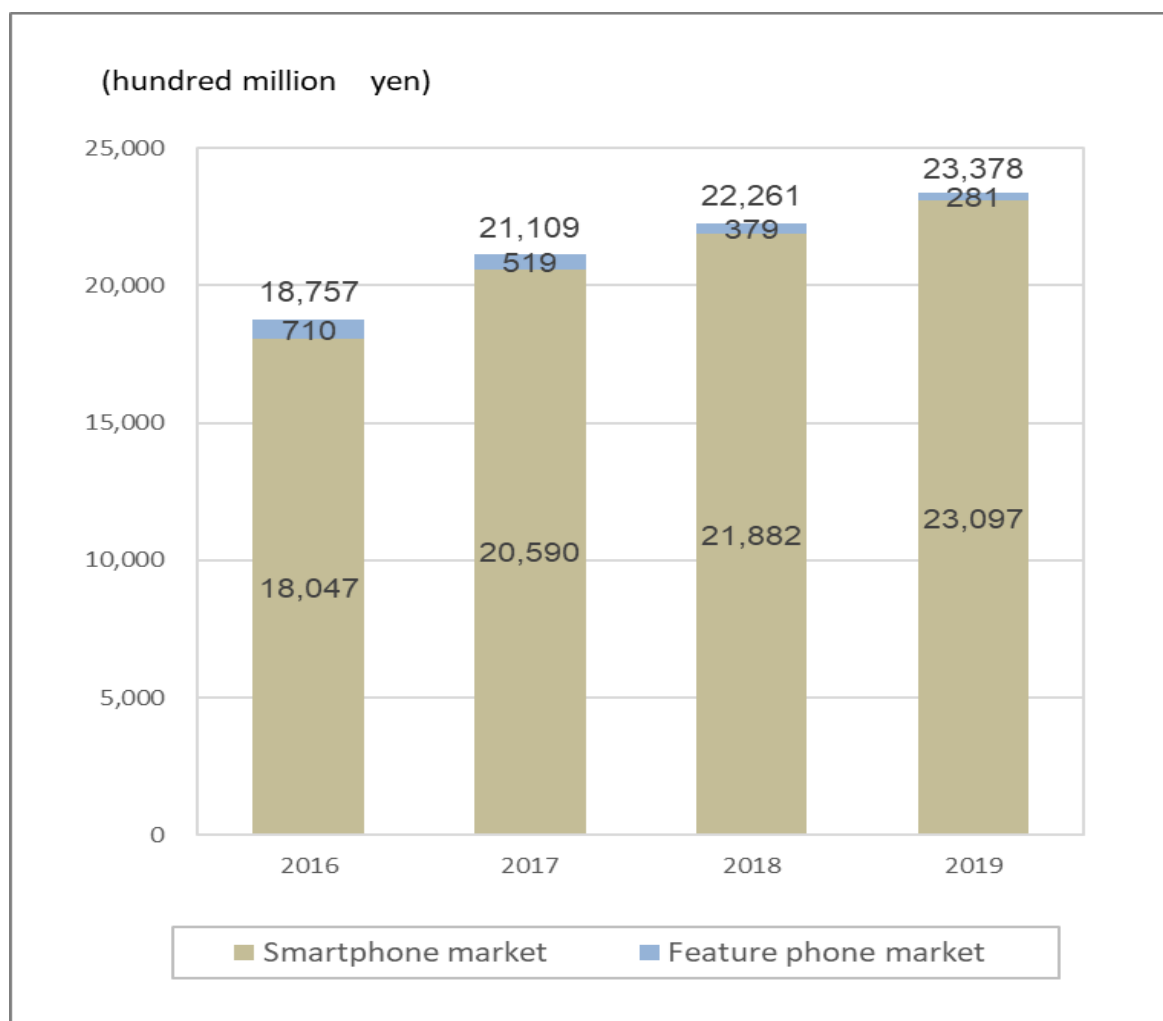
The mobile content market accounted for 2,337.8 billion yen in 2019.

The feature phone market accounted for 28.1 billion yen and the smartphone market accounted for 2,309.7 billion yen.

(Unit: hundred million yen)

	2016	2017	2018	YOY	2019	YOY
Smartphone market *1	18,047	20,590	21,882	106%	23,097	106%
Feature phone market *2	710	519	379	73%	281	74%
Mobile content market	18,757	21,109	22,261	105%	23,378	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.

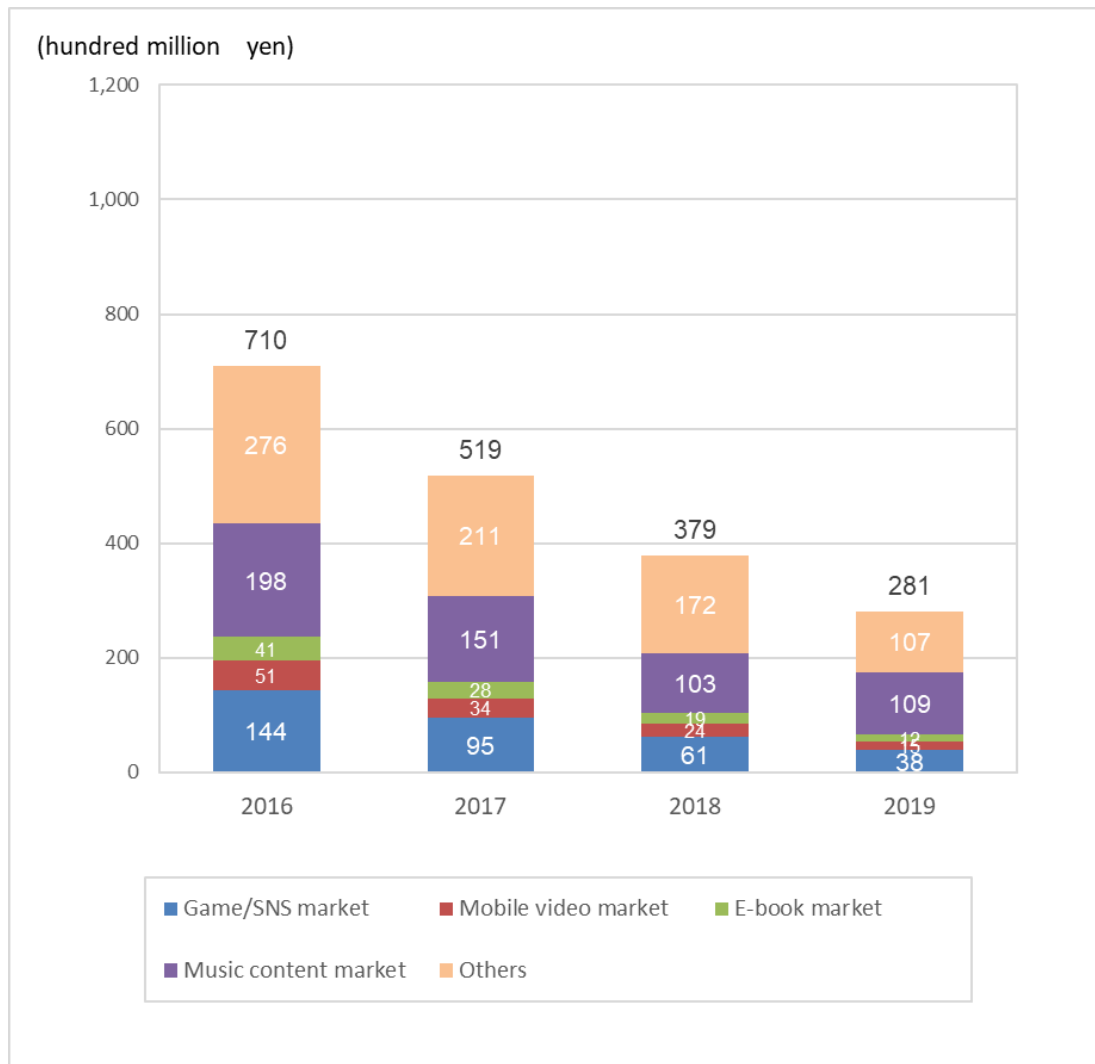
*2 Feature phones are defined as conventional mobile phones that can make use of IP services for mobile phones such as the i-mode. The feature phone market is defined as the market for selling digital content such as music and games, based on a main model representing carrier charges on an official website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

Breakdown of the 2019 Feature Phone Market

(Unit: hundred million yen)

	2016	2017	2018	YOY	2019	YOY
Game/SNS market *1	144	95	61	58%	38	64%
Mobile video market *2	51	34	24	75%	15	71%
E-book market *3	41	28	19	66%	12	68%
Music content market *4	198	151	103	76%	109	68%
Others	276	211	172	75%	107	82%
Feature Phone market totals	710	519	379	73%	281	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 2019 smartphone market

The "game and social game market" accounted for 1,397.3 billion yen.

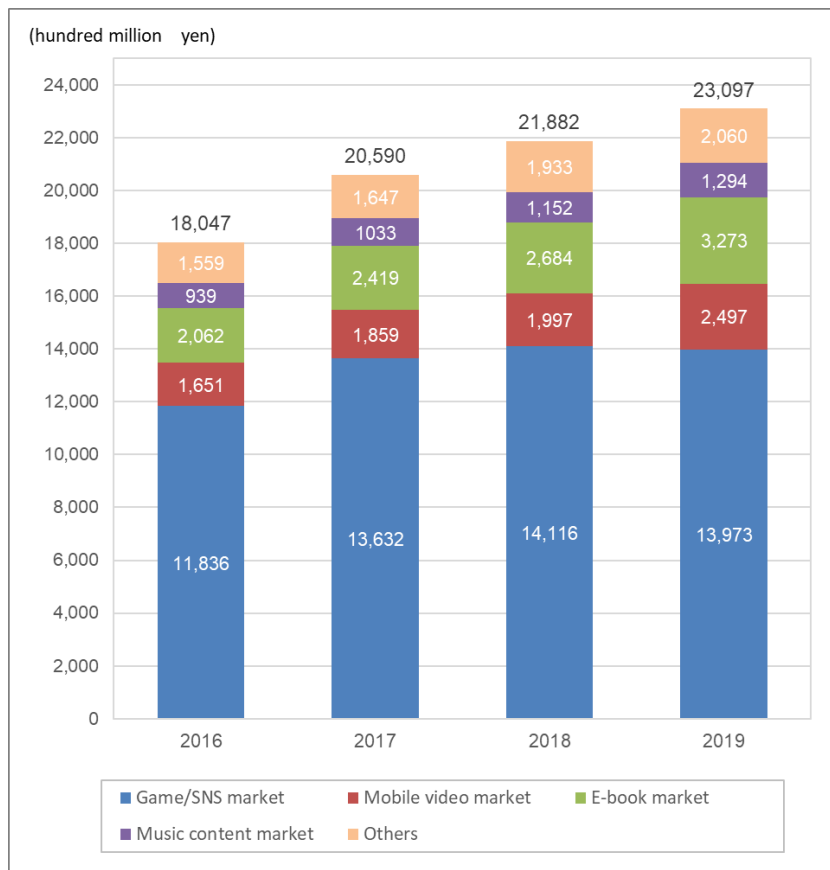
The "Mobile video market" accounted for 249.7 billion yen, and the "E-book market" accounted for 327.3 billion yen.

The "music content market" accounted for 129.4 billion yen.

(Unit: hundred million yen)

	2016	2017	2018	YOY	2019	YOY
Game/SNS market *1	11,836	13,632	14,116	104%	13,973	99%
Mobile video market *2	1,651	1,859	1,997	107%	2,497	125%
E-book market *3	2,062	2,419	2,684	111%	3,273	122%
Music content market *4	939	1,033	1,152	112%	1,294	112%
Others	1,559	1,647	1,933	117%	2,060	107%
Smartphone market totals	18,047	20,590	21,882	106%	23,097	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 2019 was 2,337.8 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 2,309.7 billion yen for year-on-year growth of 106%. On the other hand, the "feature phone market" accounted for 28.1 billion, shrank at only 74% of the previous year's figures.

The mobile commerce market accounted for 4,549.3 billion yen in 2019.

"Shopping" accounted for 2,289.8 billion yen.

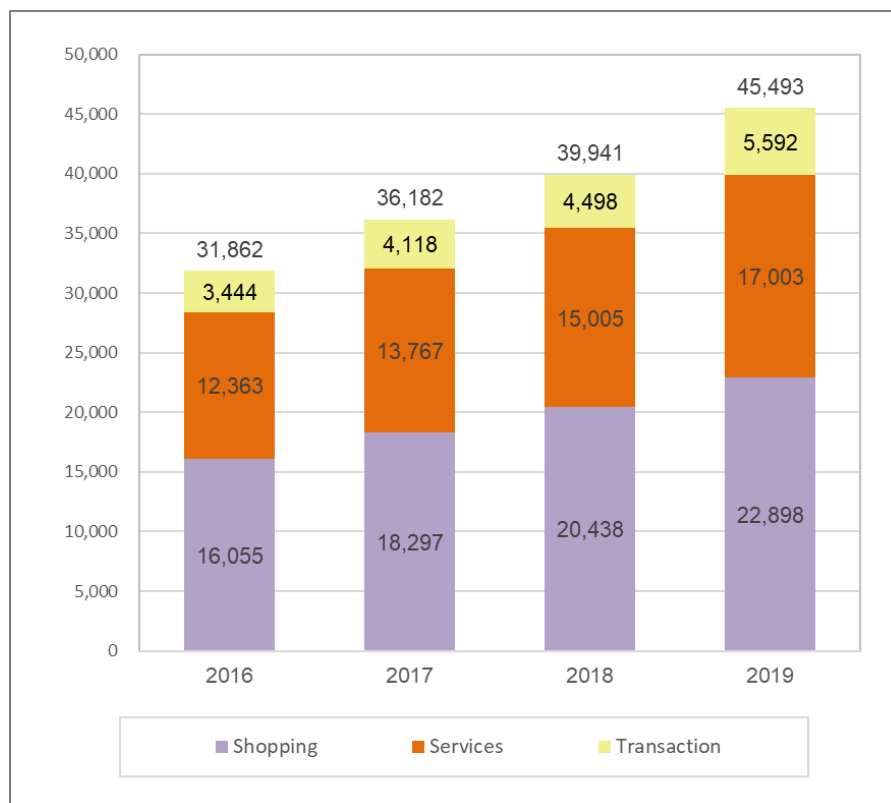
"Services" accounted for 1,700.3 billion yen.

"Transaction" accounted for 559.2 billion yen.

(Unit: hundred million yen)

	2016	2017	2018	YOY	2019	YOY
Shopping	16,055	18,297	20,438	112%	22,898	112%
Services	12,363	13,767	15,005	109%	17,003	113%
Transaction	3,444	4,118	4,498	109%	5,592	124%
Mobile commerce market totals	31,862	36,182	39,941	110%	45,493	114%

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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 4,549.3 billion yen for a year-on-year of 114%.

The "shopping market" for purchasing products accounted for 2,289.8 billion yen, providing a year-on-year of 112%. The "services market" accounted for 1,700.3 billion yen for a year-on-year of 113%. The "transaction market" accounted for 559.2 billion yen for a year-on-year of 124%

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 92 companies (as of August 2020), most of whom are content providers.

Inquiries regarding this release

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