

To News Organizations and Journalists

Mobile Content Forum

The 2013 total for mobile content related markets was 3,014.2 billion yen.

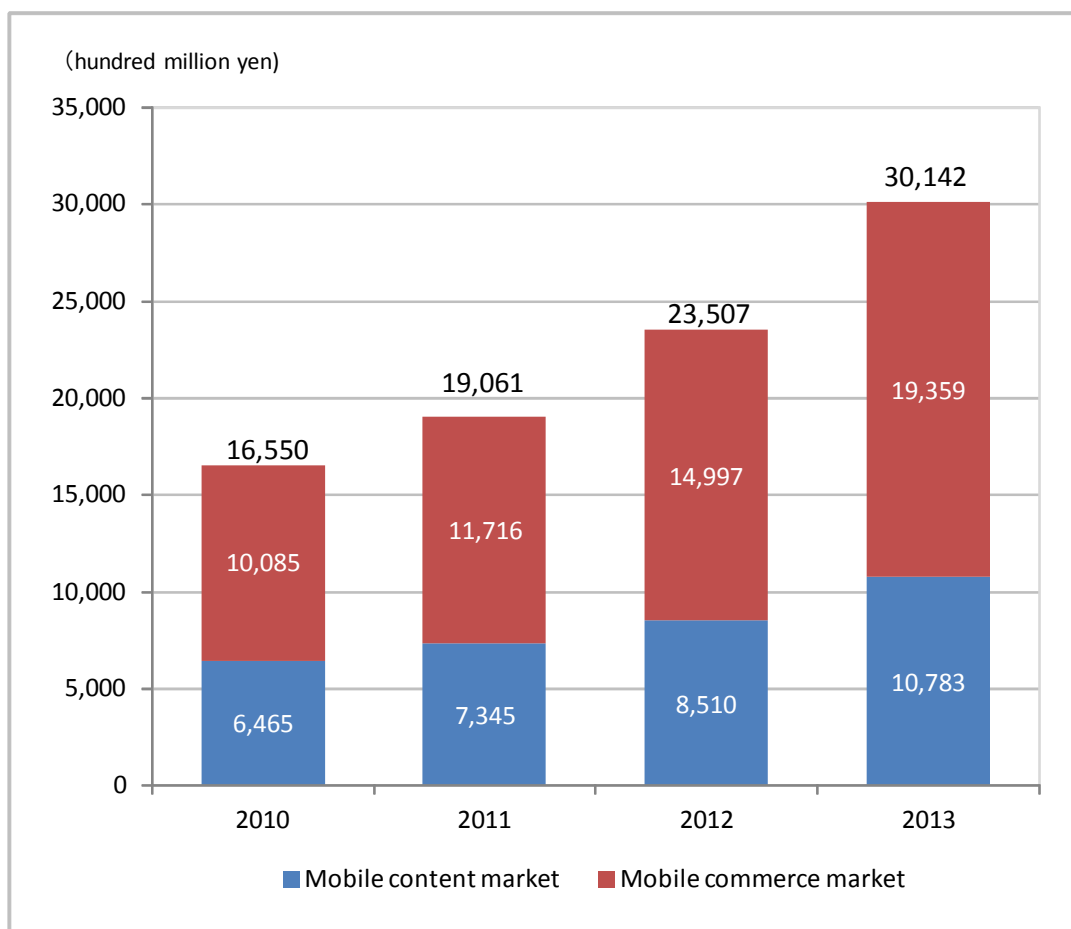
The mobile content market accounted for 1,078.3 billion yen.

The mobile commerce market accounted for 1,935.9 billion yen.

(Unit: hundred million yen)

Market category	2010	2011	2012	Year-on-year	2013	Year-on-year
Mobile content market	6,465	7,345	8,510	116%	10,783	127%
Mobile commerce market	10,085	11,716	14,997	128%	19,359	129%
Mobile content related markets	16,550	19,061	23,507	123%	30,142	128%

Mobile Content Forum Survey



Mobile Content Forum (MCF) conducted market research regarding the mobile content-related market in 2013 (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 2013, was 3,014.2 billion yen for a positive year-on-year of 128%. 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.

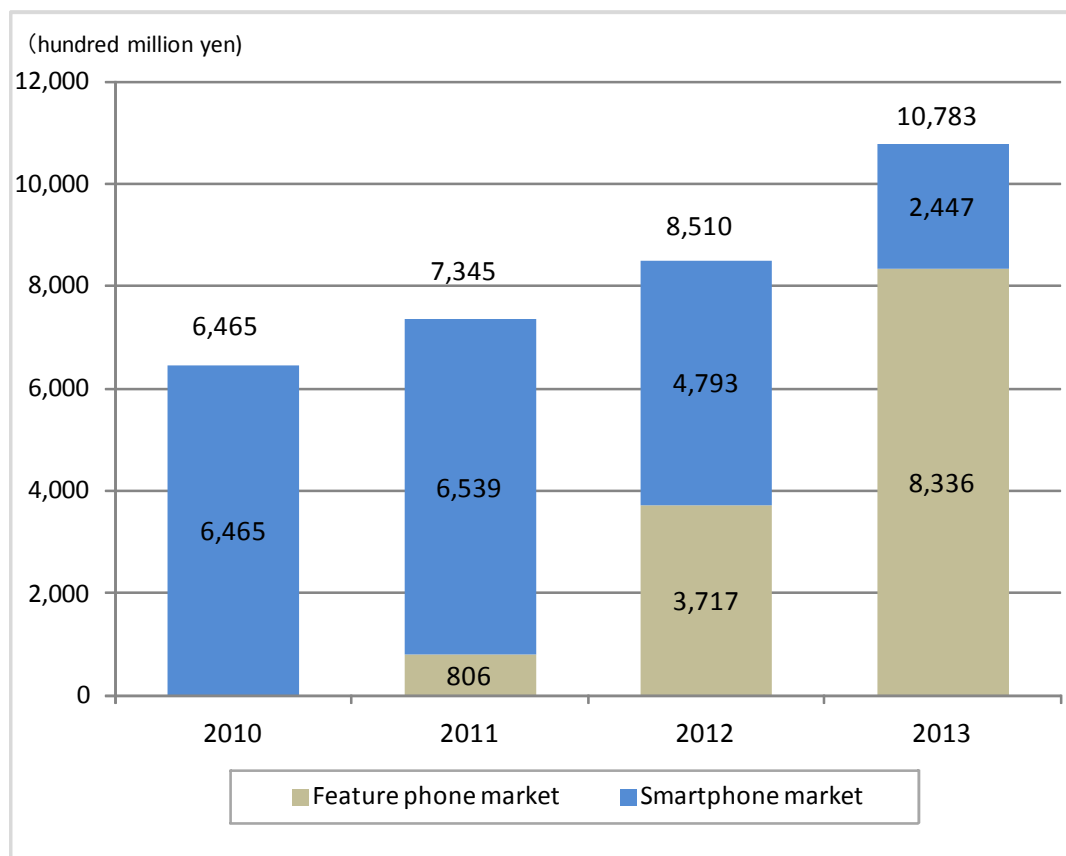
The mobile content market accounted for 1,078.3 billion yen in 2013.

The feature phone market accounted for 244.7 billion yen and the smartphone market accounted for 833.6 billion yen.

(Unit: hundred million yen)

	2010	2011	2012	Year-on-year	2013	Year-on-year
Feature phone market *1	6,465	6,539	4,793	73%	2,447	51%
Smartphone market *2	(123)	806	3,717	461%	8,336	224%
Mobile content market	6,465	7,345	8,510	116%	10,783	127%

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 2013 Feature Phone Market

The "social game market" accounted for 77 billion yen.

The "ringtone market" accounted for 13.5 billion yen, and the "chaku-uta market" accounted for 28.9 billion yen.

The "arts and entertainment market" accounted for 8.5 billion yen.

The "weather and news market" account for 8.4 billion yen.

(Unit: hundred million yen)

	2010	2011	2012	Year-on-year	2013	Year-on-year
Ringtone market	335	287	200	70%	135	68%
Chaku-uta market	1,133	942	554	59%	289	52%
(Breakdown) Chaku-uta market	369	300	176	59%	104	59%
(Breakdown)Chaku-uta Full market	764	642	378	59%	185	49%
Mobile game market	822	570	398	70%	194	49%
Decomail® market	243	213	128	60%	58	45%
E-book market	516	489	320	65%	159	50%
Ringback tone market	130	118	94	80%	66	70%
Horoscope market	185	180	122	68%	71	58%
Standby image market	214	172	108	63%	50	46%
Kisekae tool market	117	103	54	52%	22	41%
Weather/news market *1	127	140	120	86%	84	70%
Traffic information market *2	267	217	160	74%	114	71%
Lifestyle information market *3	170	168	159	95%	55	35%
Avatar/item sales (SNS, etc.) *4	1,389	2,078	1,888	91%	770	41%
Mobile video *5	162	176	93	53%	40	43%
Arts/entertainment *6	242	242	103	43%	85	83%
Media/information *7	62	54	37	69%	20	54%
Other mobile content market	351	390	255	65%	235	92%
Feature phone market totals	6,465	6,593	4,793	73%	2,447	51%

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*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.

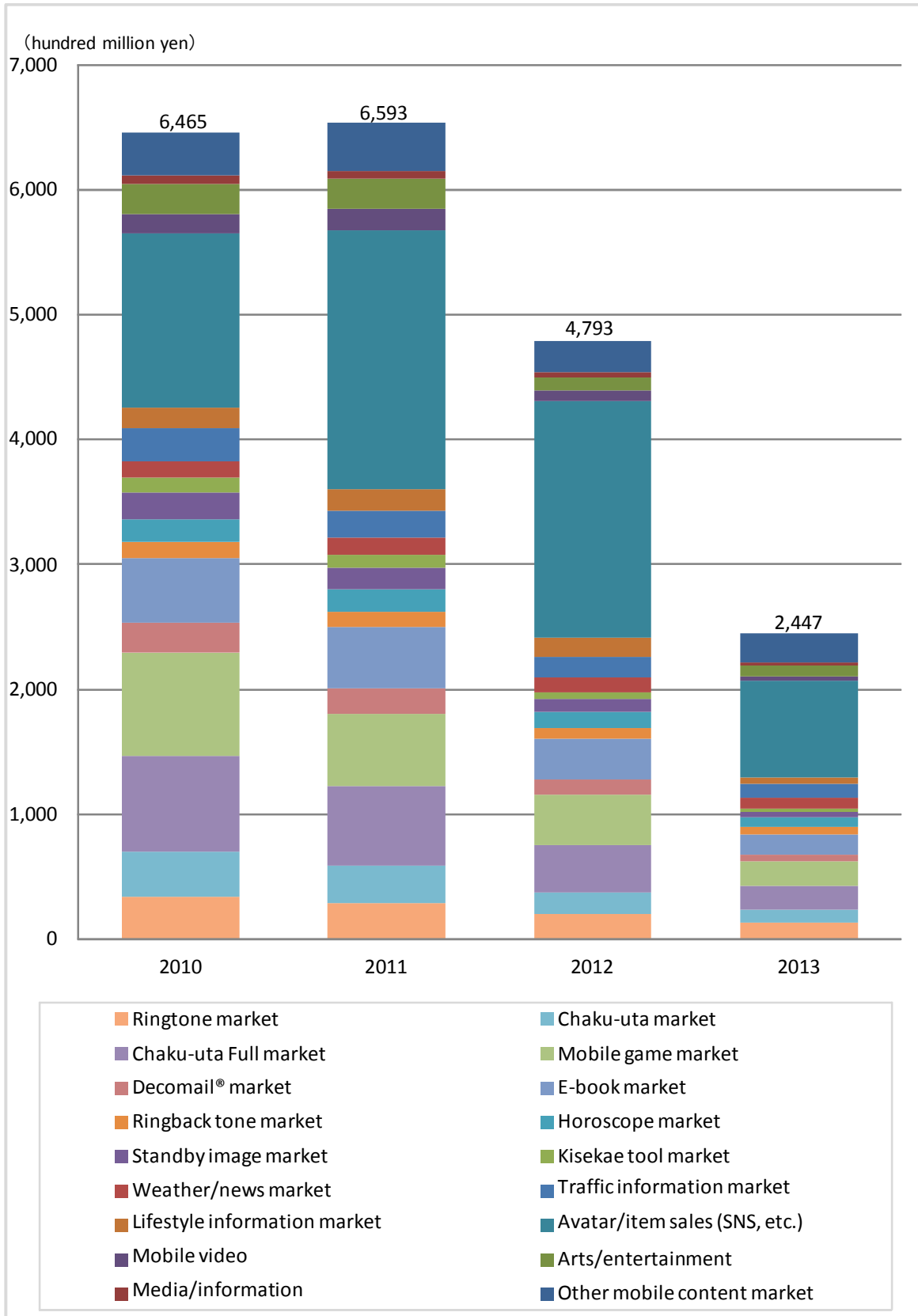
*4 The social game market had its name changed in 2011 from "avatar/item selling (SNS, etc.)" to the "social game market". This includes digital tools that can be bought such as SNS related charges, avatars, and other items.

*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 2013 smartphone market

The "game and social game market" accounted for 559.7 billion yen.

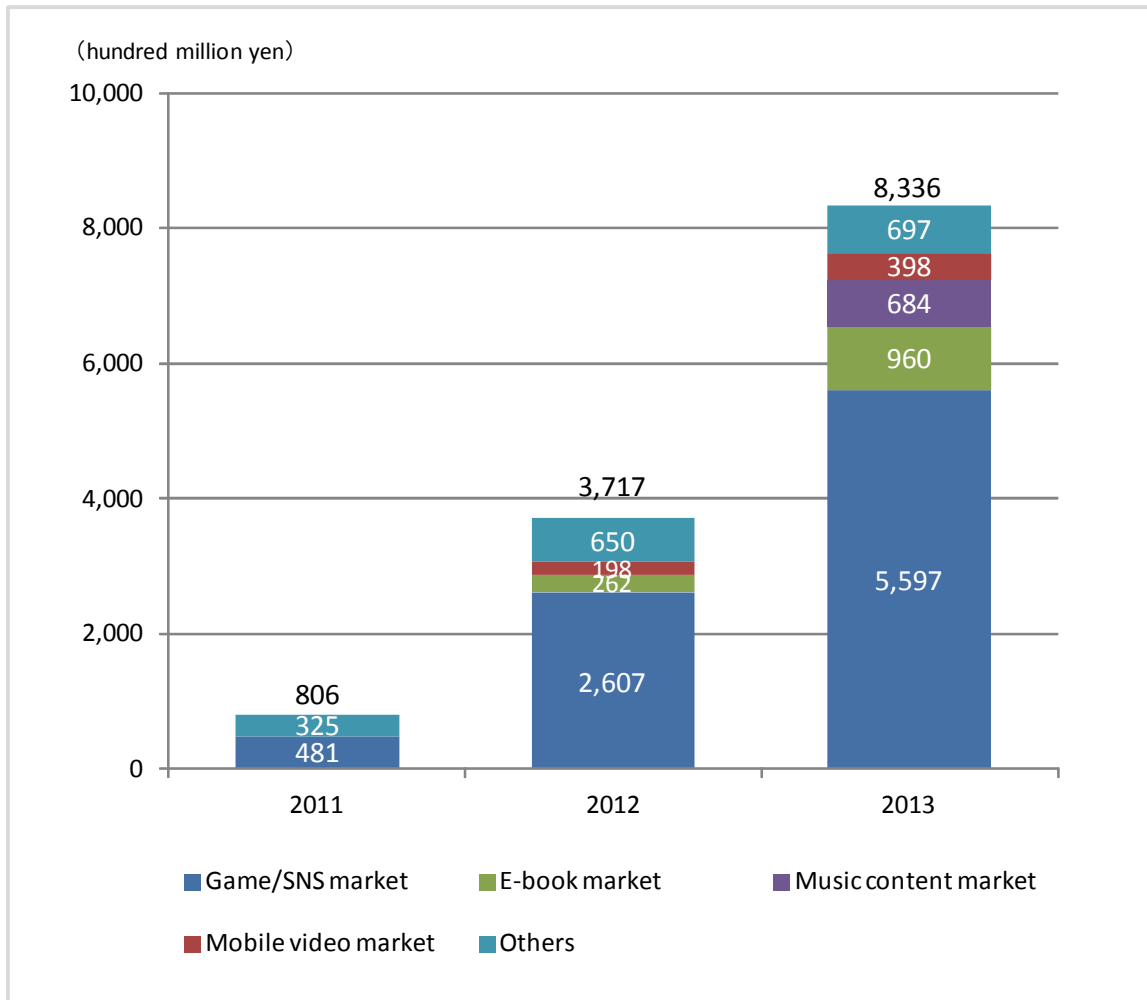
The "video and movie market" accounted for 96 billion yen, and the "E-book market" accounted for 68.4 billion yen.

The "music content market" accounted for 39.8 billion yen.

(Unit: hundred million yen)

	2011	2012	2013	Year-on-year
Game/SNS market *1	481	2,607	5,597	215%
Mobile video market *2	-	262	960	366%
E-book market *3	-	-	684	-
Music content market *4	-	198	398	201%
Others	325	650	697	107%
Smartphone market totals	806	3,717	8,336	224%

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 "video and movie 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 2013 was 1078.3 billion yen, which is up, providing a year-on-year increase of 127%. 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 244.7 billion, shrank rapidly at only 51% of the previous year's figures. On the other hand, the "smartphone market" experienced quick growth at 833.6 billion yen for year-on-year growth of 224%

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 67% of the whole market, providing for 559.7 billion yen. And, the "video and movie market" and "music content market", accounted for 96.0 billion yen and 39.8 billion yen respectively. In addition, "E-book market" which is newly added market categories from this year, accounted for 68.4 billion yen

The mobile commerce market accounted for 1,935.9 billion yen in 2013.

"Shopping" accounted for 955.5 billion yen.

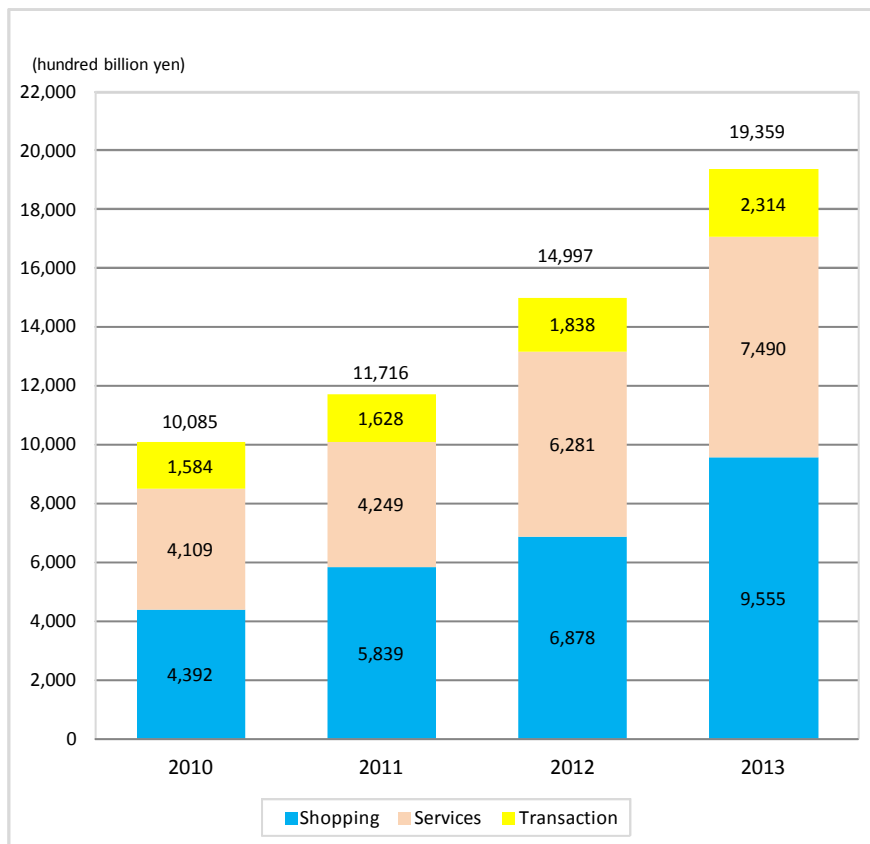
"Services" accounted for 749.0 billion yen.

"Transaction" accounted for 231.4 billion yen.

(Unit: hundred million yen)

	2010	2011	2012	Year-on-year	2013	Year-on-year
Shopping	4,392	5,839	6,878	118%	9,555	139%
Services	4,109	4,249	6,281	148%	7,490	119%
Transaction	1,584	1,628	1,838	113%	2,314	126%
Mobile commerce market totals	10,085	11,716	14,997	128%	19,359	129%

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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 1,935.9 billion yen for a year-on-year of 129%.

The "shopping market" for purchasing products accounted for 955.5 billion yen, providing a year-on-year of 139%. The "services market" accounted for 749 billion yen for a year-on-year of 119%. The "transaction market" accounted for 231.4 billion yen for a year-on-year of 126%

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 161 companies (as of July 2014), most of whom are content providers.

Inquiries regarding this release

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