

To News Organizations and Journalists

Mobile Content Forum

The 2016 total for mobile content related markets was 4,422.8 billion yen.

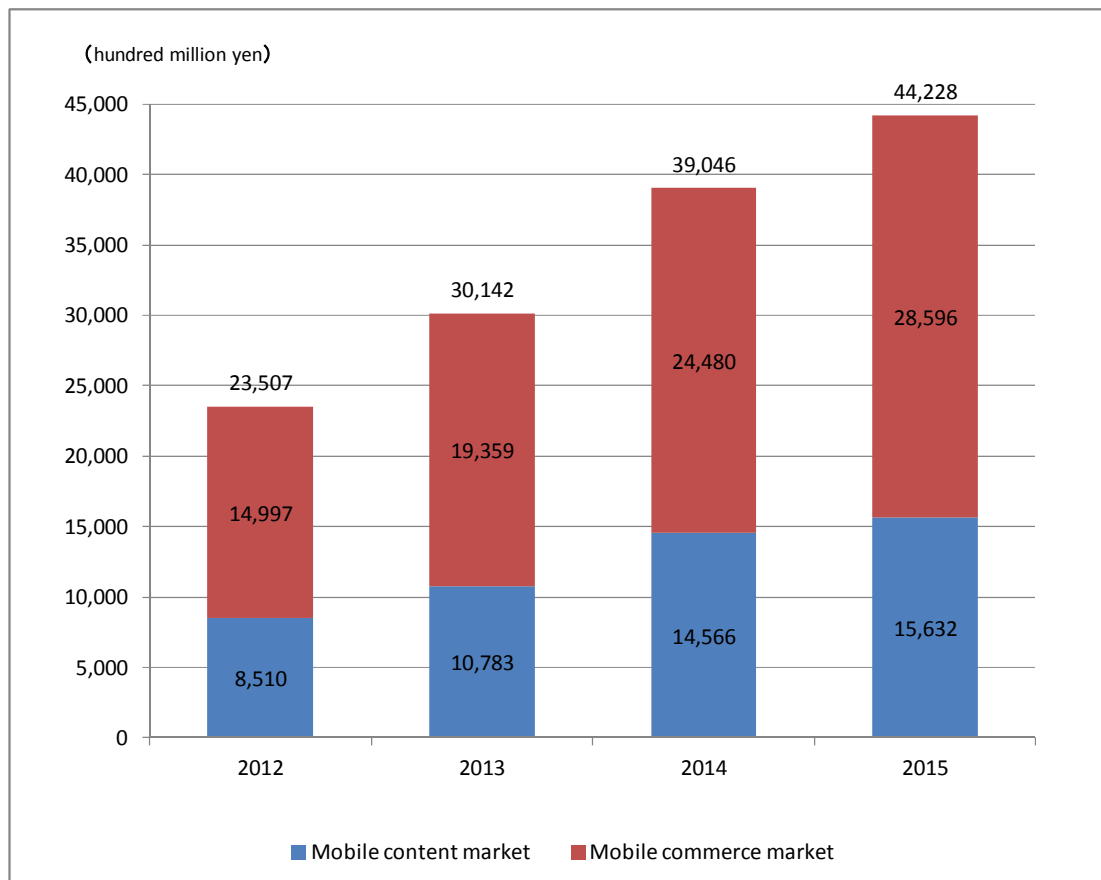
The mobile content market accounted for 1,563.2 billion yen.

The mobile commerce market accounted for 2,859.6 billion yen.

(Unit: hundred million yen)

Market category	2012	2013	2014	YOY	2015	YOY
Mobile content market	8,510	10,783	14,566	135%	15,632	107%
Mobile commerce market	14,997	19,359	24,480	126%	28,596	117%
Mobile content reralted market	23,507	30,142	39,046	130%	44,228	113%

Mobile Content Forum Survey



Mobile Content Forum (MCF) conducted market research regarding the mobile content-related market in 2015 (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 2015, was 4,422.8 billion yen for a positive year-on-year of 113%. 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.

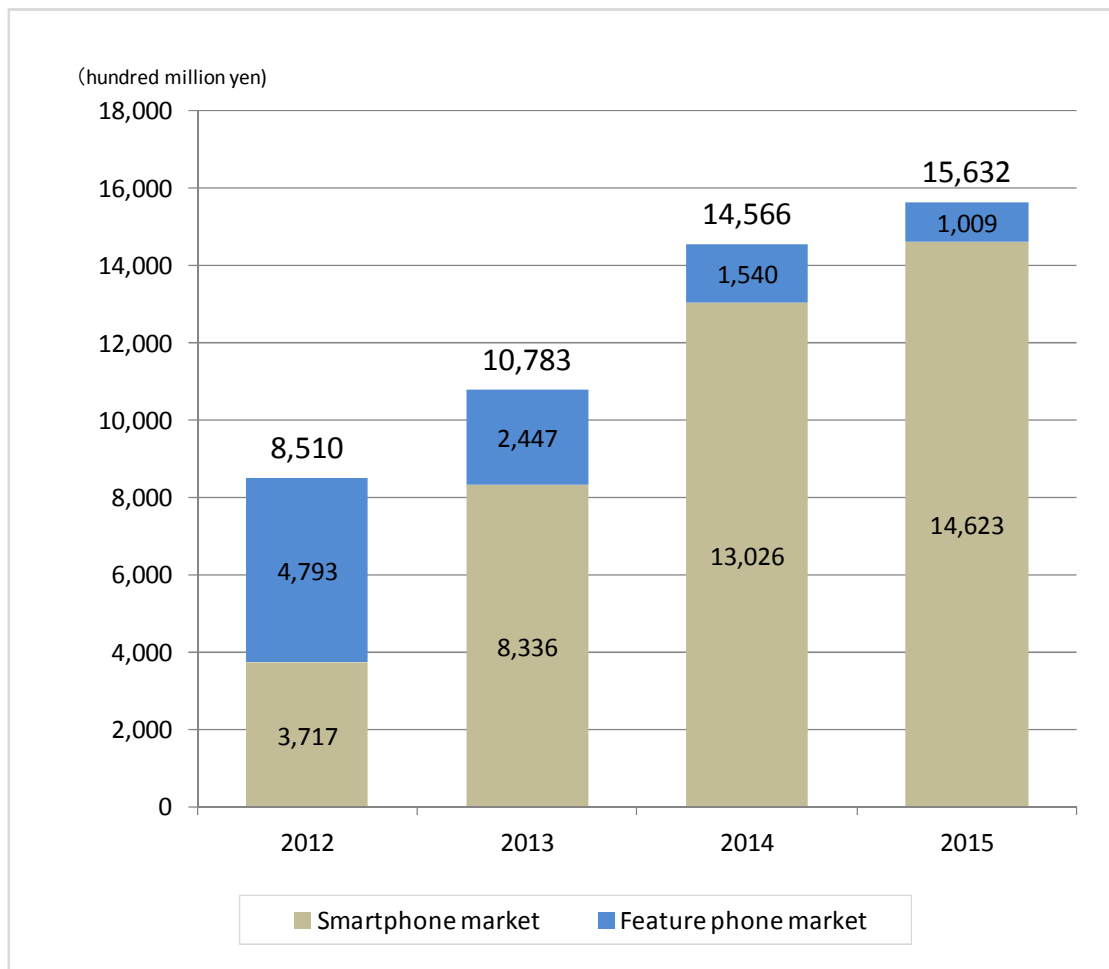
The mobile content market accounted for 1,563.2 billion yen in 2015.

The feature phone market accounted for 100.9 billion yen and the smartphone market accounted for 1,462.3 billion yen.

(Unit: hundred million yen)

	2012	2013	2014	YOY	2015	YOY
Smartphone market *1	3,717	8,336	13,026	156%	14,623	112%
Feature phone market *2	4,793	2,447	1,540	63%	1,009	66%
Mobile content market	8,510	10,783	14,566	135%	15,632	107%

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.

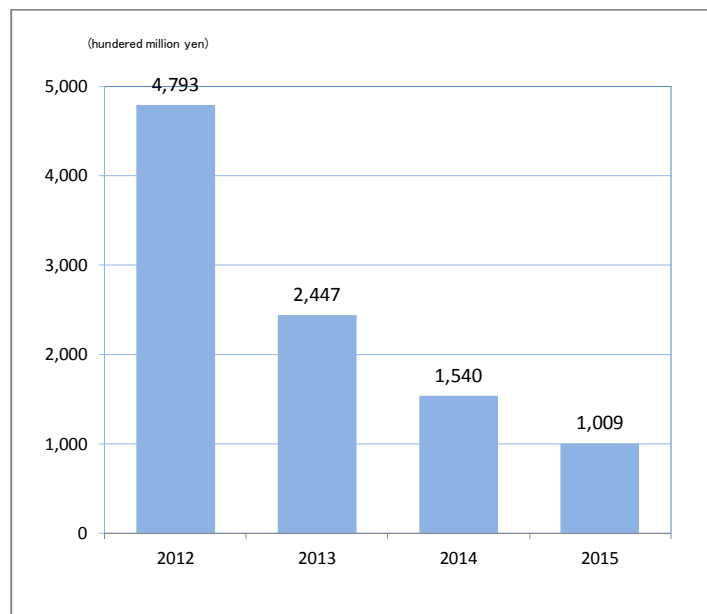
*2 Feature phones are defined as conventional mobile phones that can make use of IP services for mobile phones such as the i-mode. The feature phone market is defined as the market for selling digital content such as music and games, based on a main model representing carrier charges on an official website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

Breakdown of the 2015 Feature Phone Market

(Unit: hundred million yen)

	2012	2013	2014	YOY	2015	YOY
Ringtone market	200	135	95	70%	78	82%
Chaku-uta market	554	289	186	64%	135	73%
(Breakdown) Chaku-uta market	176	104	66	63%	52	79%
(Breakdown)Chaku-uta Full market	378	185	120	65%	83	69%
Mobile game market	398	194	112	58%	78	70%
Decomail® market	128	58	45	78%	25	56%
E-book market	320	159	99	62%	62	63%
Ringback tone market	94	66	61	92%	47	77%
Horoscope market	122	71	40	56%	29	73%
Standby image market	108	50	32	64%	22	69%
Kisekae tool market	54	22	17	77%	9	53%
Weather/news market *1	120	84	73	87%	61	84%
Traffic information market *2	160	114	86	75%	76	88%
Lifestyle information market *3	159	55	24	44%	22	92%
Avatar/item sales (SNS, etc.) *4	1,888	770	364	47%	171	47%
Mobile video *5	93	40	24	60%	13	54%
Arts/entertainment *6	103	85	44	52%	26	59%
Media/information *7	37	20	11	55%	9	82%
Other mobile content market	255	235	227	97%	146	64%
Feature phone market totals	4,793	2,447	1,540	63%	1,009	66%

Mobile Content Forum Survey



*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.

Breakdown of the 2015 smartphone market

The "game and social game market" accounted for 962.8 billion yen.

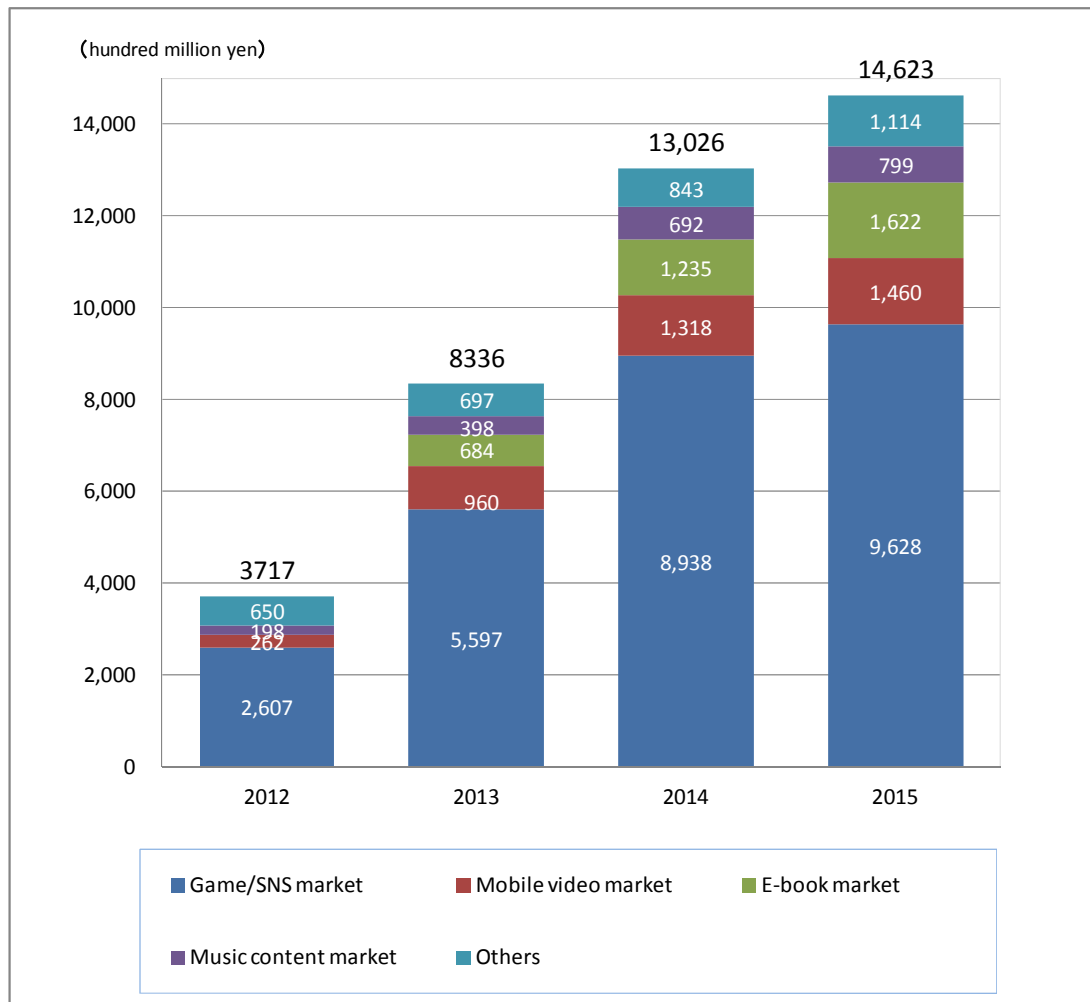
The "Mobile video market" accounted for 146.0 billion yen, and the "E-book market" accounted for 162.2 billion yen.

The "music content market" accounted for 79.9 billion yen.

(Unit: hundred million yen)

	2012	2013	2014	YOY	2015	YOY
Game/SNS market *1	2,607	5,597	8,938	160%	9,628	108%
Mobile video market *2	262	960	1,318	137%	1,460	111%
E-book market *3	-	684	1,235	-	1,622	131%
Music content market *4	198	398	692	174%	799	115%
Others	650	697	843	121%	1,114	132%
Smartphone market totals	3,717	8,336	13,026	156%	14,623	112%

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 2015 was 1,563.2 billion yen, which is up, providing a year-on-year increase of 107%. 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 1,462.3 billion yen for year-on-year growth of 112%. On the other hand, the "feature phone market" accounted for 100.9 billion, shrank at only 66% 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 66% of the whole market, providing for 962.8 billion yen. And, the "Mobile video market" and the "Music content market", accounted for 146.0 billion yen and 79.9 billion yen respectively. In addition, the "E-book market" accounted for 162.2 billion yen.

The mobile commerce market accounted for 2,859.6 billion yen in 2015.

"Shopping" accounted for 1,463.2 billion yen.

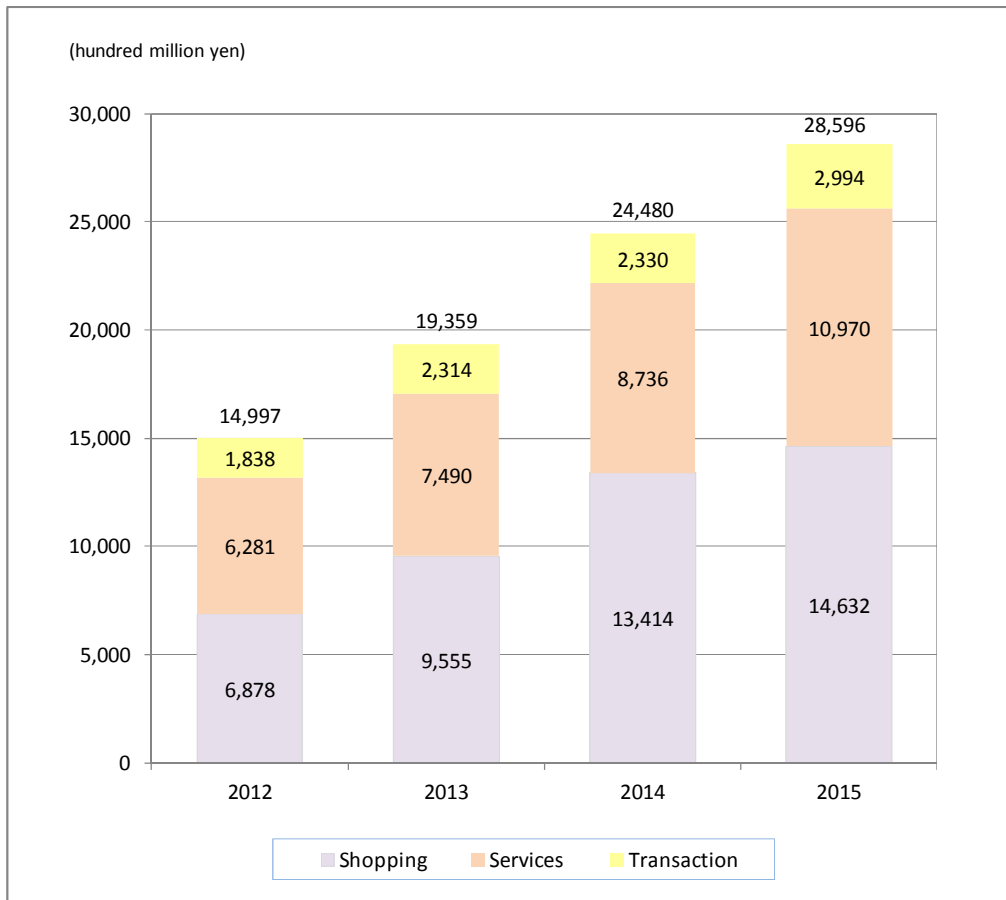
"Services" accounted for 1,097.0 billion yen.

"Transaction" accounted for 299.4 billion yen.

(Unit: hundred million yen)

	2012	2013	2014	YOY	2015	YOY
Shopping	6,878	9,555	13,414	140%	14,632	109%
Services	6,281	7,490	8,736	117%	10,970	126%
Transaction	1,838	2,314	2,330	101%	2,994	128%
Mobile commerce market totals	14,997	19,359	24,480	126%	28,596	117%

*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 2,859.6 billion yen for a year-on-year of 117%.

The "shopping market" for purchasing products accounted for 1,463.2 billion yen, providing a year-on-year of 109%. The "services market" accounted for 1,097.0 billion yen for a year-on-year of 126%. The "transaction market" accounted for 299.4 billion yen for a year-on-year of 128%

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 138 companies (as of August 2016), most of whom are content providers.

Inquiries regarding this release

■Mobile Content Forum

Sawada Building 4F, Higashi 3-22-8, Shibuya-ku, Tokyo, Japan 150-0011

Contact us :<https://www.mcf.or.jp/en/inquiry.html>

URL : <http://www.mcf.or.jp/en/>

E-mail: info@mcf.or.jp