

To News Organizations and Journalists

Mobile Content Forum

**The 2020 total for mobile content related markets was 7,115.8 billion yen.**

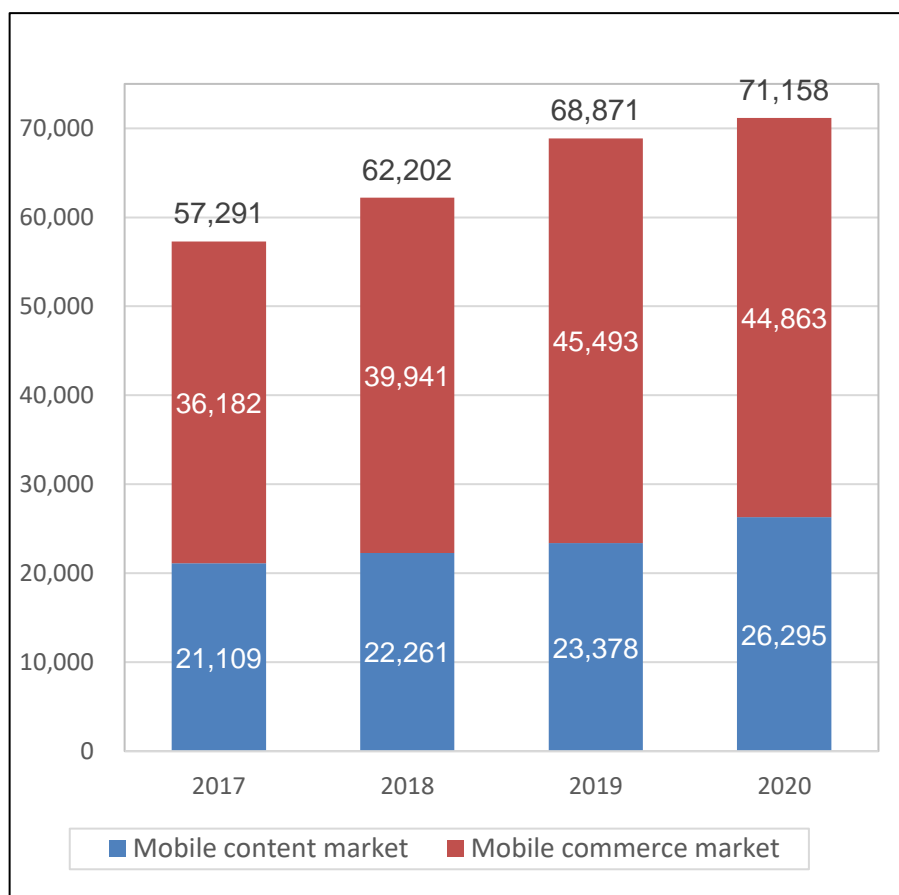
**The mobile content market accounted for 2,629.5 billion yen.**

**The mobile commerce market accounted for 4,486.3 billion yen.**

(Unit: hundred million yen)

Market category	2017	2018	2019	YOY	2020	YOY
Mobile content market	21,109	22,261	23,378	105%	26,295	112%
Mobile commerce market	36,182	39,941	45,493	114%	44,863	99%
Mobile content related market	57,291	62,202	68,871	111%	71,158	103%

Mobile Content Forum Survey



Mobile Content Forum (MCF) conducted market research regarding the mobile content-related market in 2020 (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 2020, was 7,115.8 billion yen for a positive year-on-year of 103%. 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.

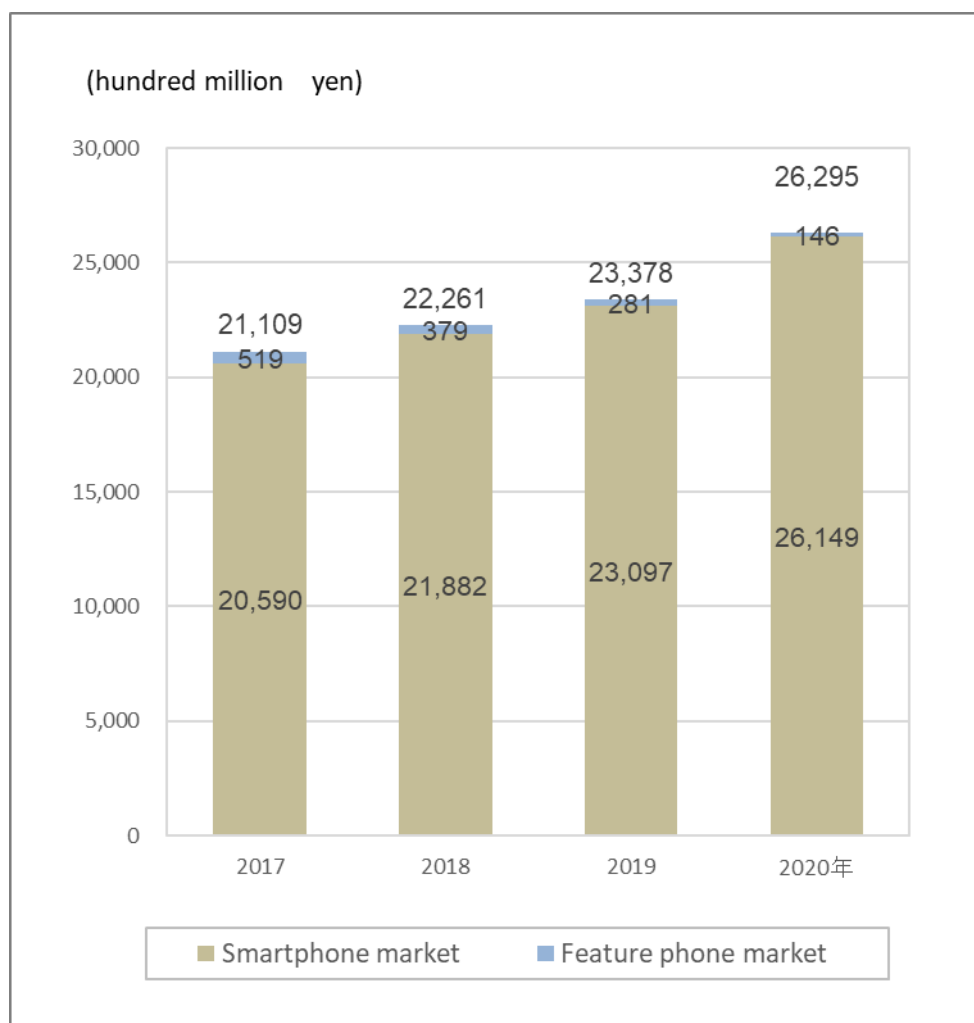
**The mobile content market accounted for 2,629.5 billion yen in 2020.**

**The feature phone market accounted for 14.6 billion yen and the smartphone market accounted for 2,614.9 billion yen.**

(Unit: hundred million yen)

	2017	2018	2019	YOY	2020	YOY
Smartphone market *1	20,590	21,882	23,097	106%	26,149	113%
Feature phone market *2	519	379	281	74%	146	52%
Mobile content market	21,109	22,261	23,378	105%	26,295	112%

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.

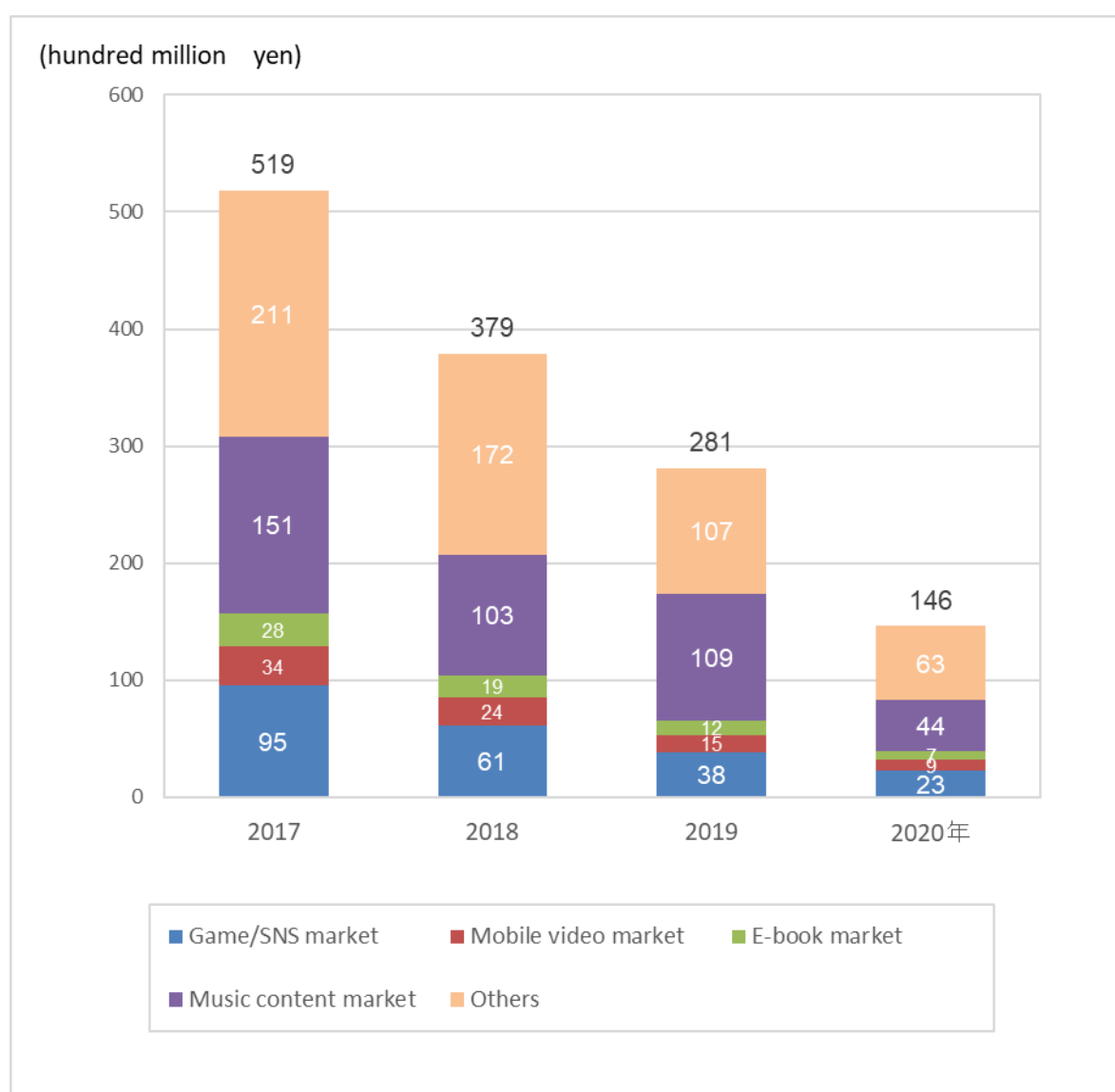
\*2 Feature phones are defined as conventional mobile phones that can make use of IP services for mobile phones such as the i-mode. The feature phone market is defined as the market for selling digital content such as music and games, based on a main model representing carrier charges on an official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

### Breakdown of the 2020 Feature Phone Market

(Unit: hundred million yen)

	2017	2018	2019	YOY	2020	YOY
Game/SNS market *1	95	61	38	62%	23	61%
Mobile video market *2	34	24	15	63%	9	60%
E-book market *3	28	19	12	63%	7	58%
Music content market *4	151	103	109	106%	44	40%
Others	211	172	107	62%	63	59%
<b>Feature Phone market totals</b>	<b>519</b>	<b>379</b>	<b>281</b>	<b>74%</b>	<b>146</b>	<b>52%</b>

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 2020 smartphone market**

**The "game and social game market" accounted for 1,526.5 billion yen.**

**The "Mobile video market" accounted for 342.1 billion yen, and the "E-book market" accounted for 393.9 billion yen.**

**The "music content market" accounted for 142.3 billion yen.**

(Unit: hundred million yen)

	2017	2018	2019	YOY	2020	YOY
Game/SNS market *1	13,632	14,116	13,973	99%	15,265	109%
Mobile video market *2	1,859	1,997	2,497	125%	3,421	137%
E-book market *3	2,419	2,684	3,273	122%	3,939	120%
Music content market *4	1,033	1,152	1,294	112%	1,423	110%
Others	1,647	1,933	2,060	107%	2,101	102%
Smartphone market totals	20,590	21,882	23,097	106%	26,149	113%

**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 2020 was 2,629.5 billion yen, which is up, providing a year-on-year increase of 112%. 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 2,614.9 billion yen for year-on-year growth of 113%. On the other hand, the "feature phone market" accounted for 14.6 billion, shrank at only 52% of the previous year's figures.

**The mobile commerce market accounted for 4,486.3 billion yen in 2020.**

**"Shopping" accounted for 2,784.9 billion yen.**

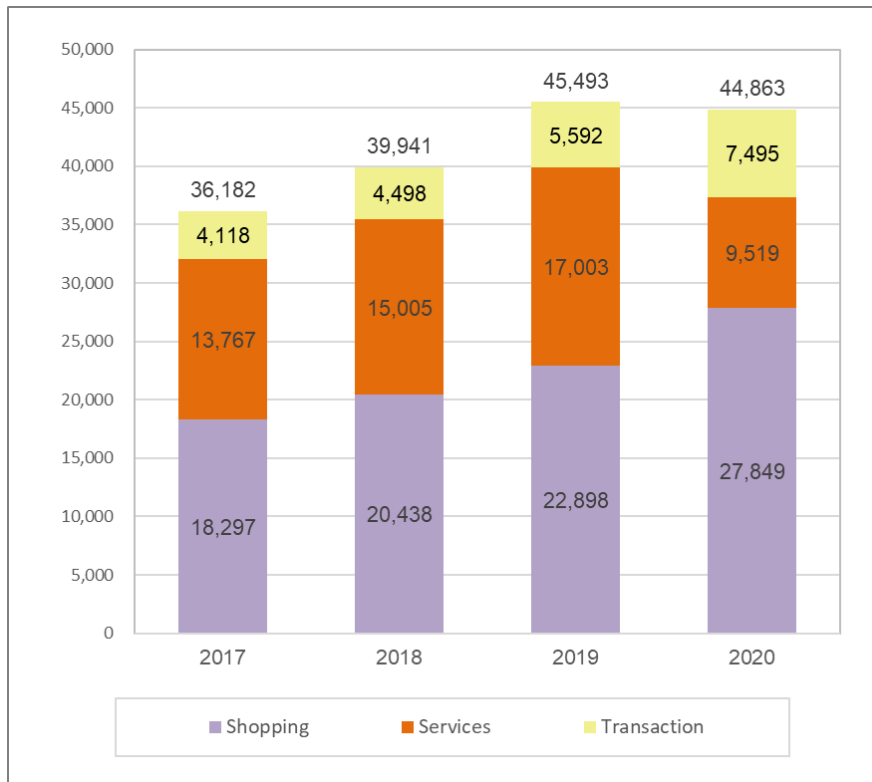
**"Services" accounted for 951.9 billion yen.**

**"Transaction" accounted for 749.5 billion yen.**

(Unit: hundred million yen)

	2017	2018	2019	YOY	2020	YOY
Shopping	18,297	20,438	22,898	112%	27,849	122%
Services	13,767	15,005	17,003	113%	9,519	56%
Transaction	4,118	4,498	5,592	124%	7,495	134%
Mobile commerce market totals	36,182	39,941	45,493	114%	44,863	99%

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 4,486.3 billion yen for a year-on-year of 99%.

The "shopping market" for purchasing products accounted for 2,784.9 billion yen, providing a year-on-year of 122%. The "services market" accounted for 951.9 billion yen for a year-on-year of 56%. The "transaction market" accounted for 749.5 billion yen for a year-on-year of 134%

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 83 companies (as of June 2021), most of whom are content providers.

Inquiries regarding this release

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