

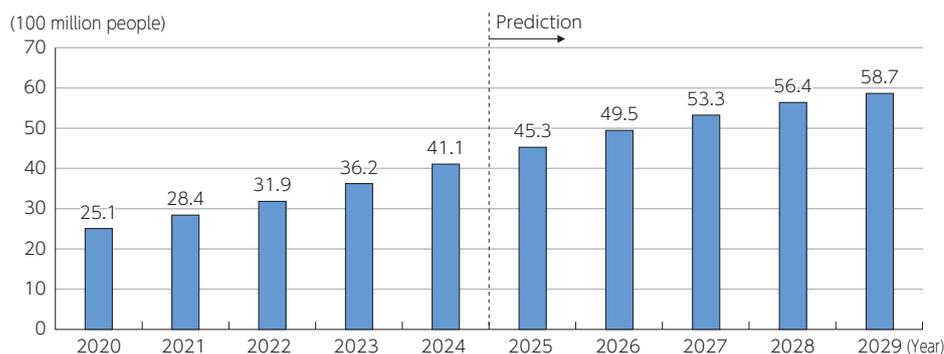
## Section 7 Trends in the market of ICT services and contents and application services

### 1. SNS

The number of social media users worldwide<sup>1</sup> is expected to increase from 4.11 billion in 2024 to 5.87 billion by 2029. Social media is being used not only for text

communication purposes but also for other purposes such as watching short video content (Figure 2-1-7-1).

Figure 2-1-7-1 Changes and forecasts of the number of global social media users



(Source) Prepared based on Statista (data obtained on February 1, 2025)<sup>2</sup>

### 2. EC

The global EC market sales continue to show an increasing trend, with an estimated expansion from 7.2 trillion dollars in 2024 to 10.4 trillion dollars in 2028. The average annual growth rate by country from 2024 to 2029 is expected to be high in Turkey, Brazil, India and

Mexico, while countries such as Japan, the U.S., and Germany are expected to fall below the global average, and South Korea is expected to have a particularly low growth rate.



**Figure (related data) Changes and forecasts of sales in the global EC market**

Source: Prepared based on Statista (a.o. eMarketer, Activate, Digital Commerce 360) (data obtained on February 1, 2025)  
 URL: <https://www.soumu.go.jp/johotsusintokei/whitepaper/ja/r07/html/datashu.html#f00238>  
 (Data collection)



**Figure (related data) Growth rate of EC market by country (2024 to 2029)**

Source: Prepared based on Statista "Statista Digital Market Insights" (data obtained on February 1, 2025)  
 URL: <https://www.soumu.go.jp/johotsusintokei/whitepaper/ja/r07/html/datashu.html#f00239>  
 (Data collection)

### 3. Searching services

In the world market for desktop search services, Google holds a high share, but its share has gradually decreased to 79.1% as of December 2024. On the other hand, Bing's share is expanding, reaching double digits at 11.9% as of December 2024. Microsoft's browser "Edge" sets Bing as the default search service, contributing to the expansion of Bing's share.

In Japan, as of December 2024, Google holds the highest share, accounting for over 70% in personal computers, smartphones and tablets. Additionally, Bing's share is roughly 12% in personal computers, while Yahoo! holds a share of less than 1% in smartphones and tablets, indicating differences in trends by device.

<sup>1</sup> The people using social media sites and applications at least once a month.

<sup>2</sup> <https://www.statista.com/forecasts/1146659/social-media-users-in-the-world>



**Figure (related data) Changes in global market share of search engines (desktop)**  
 Source: Prepared based on StatCounter (cited from Statista) (data obtained on January 31, 2025)  
 URL: <https://www.soumu.go.jp/johotsusintokei/whitepaper/ja/r07/html/datashu.html#f00242>  
 (Data collection)



**Figure (related data) Changes in global market share of search engines (mobile)**  
 Source: Prepared based on StatCounter (cited from Statista) (data obtained on January 31, 2025)  
 URL: <https://www.soumu.go.jp/johotsusintokei/whitepaper/ja/r07/html/datashu.html#f00243>  
 (Data collection)



**Figure (related data) Market share of searching engines in Japan**  
 Source: Prepared based on StatCounter (cited from Statista) (data obtained on January 31, 2025)  
 URL: <https://www.soumu.go.jp/johotsusintokei/whitepaper/ja/r07/html/datashu.html#f00244>  
 (Data collection)

## 4. Video streaming, music streaming and e-book

The global market for video streaming, music streaming, and e-books has continued to grow, driven by the increasing popularity of subscription-based services and

the rise in at-home time due to the spread of COVID-19. The total market size reached 180.3 billion dollars in 2024, marking a 12.1% increase from the previous year.

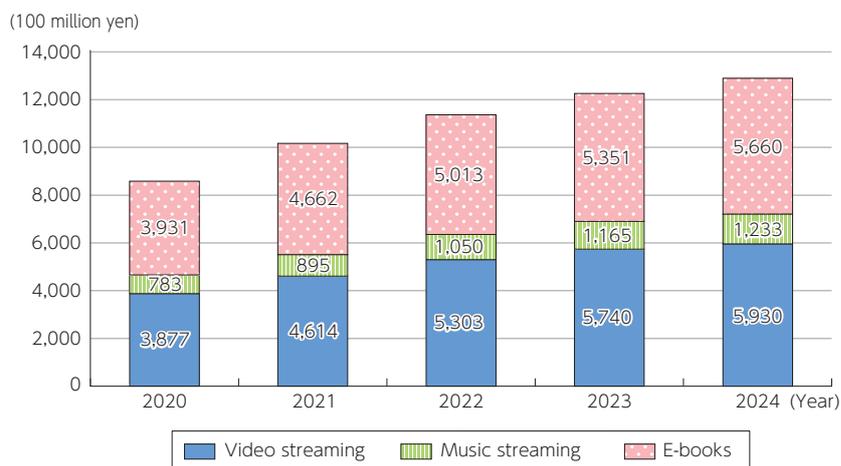


**Figure (related data) Changes in and forecast for the size of the global video streaming, music streaming and e-book markets**  
 Source: Prepared based on Omdia and Statista (data obtained on March 14, 2025)  
 URL: <https://www.soumu.go.jp/johotsusintokei/whitepaper/ja/r07/html/datashu.html#f00245>  
 (Data collection)

In Japan, the video streaming market reached 593 billion yen (a 3.3% increase from the previous year), the music streaming market 123.3 billion yen (a 5.8% increase), and the e-book market 566 billion yen (a 5.8%

increase) in 2024 (Figure 2-1-7-2). These markets are all experiencing growth trends similar to those seen globally.

**Figure 2-1-7-2 Changes in the size of the video streaming, music streaming and e-book markets in Japan**



(Source) Prepared based on GEM Partners "Video Streaming (VOD) Market Forecast for Five Years (2025-2029) Report"<sup>3</sup>, the Recording Industry Association of Japan "Japan's Recording Industry 2025"<sup>4</sup> and the All Japan Magazine and Book Publisher's and Editor's Association/Research Institute for Publications (2025) "Quarterly Publication Index - Winter 2025 Issue"<sup>5</sup>.

<sup>3</sup> <https://www.gem-standard.com/columns/1029>

<sup>4</sup> <https://www.riaj.or.jp/t/pdf/issue/industry/RIAJ2025.pdf>

<sup>5</sup> <https://shuppankagaku.com/wp/wp-content/uploads/2025/01/%E3%83%8B%E3%83%A5%E3%83%BC%E3%82%B9%E3%83%AA%E3%83%AA%E3%83%BC%E3%82%B92501.pdf>

## 5. New trends in the market of ICT services and contents and application services

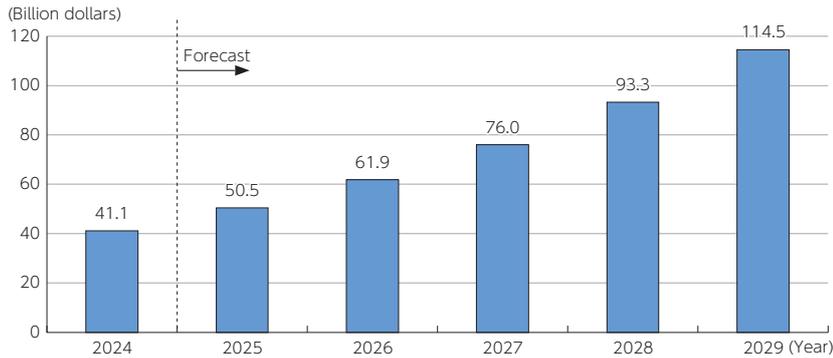
### (1) Autonomous Driving

For autonomous driving, efforts are underway to achieve Level 4 (fully autonomous driving under limited conditions) through the implementation of autonomous driving by local governments and private companies, as well as research and development by universities and private companies. There is a shift towards systems that use AI technology, and development of hybrid frame-

works is also underway, integrating traditional robotics approaches which allow for detailed protocol descriptions<sup>6</sup>.

The size of the global autonomous driving market is predicted to exceed 40 billion dollars in 2024 and reach approximately 110 billion dollars by 2029 (Figure 2-1-7-3).

Figure 2-1-7-3 The size of the global autonomous driving market



(Source) Prepared based on BNP Paribas (cited from Statista) (data obtained on March 12, 2025)<sup>7</sup>

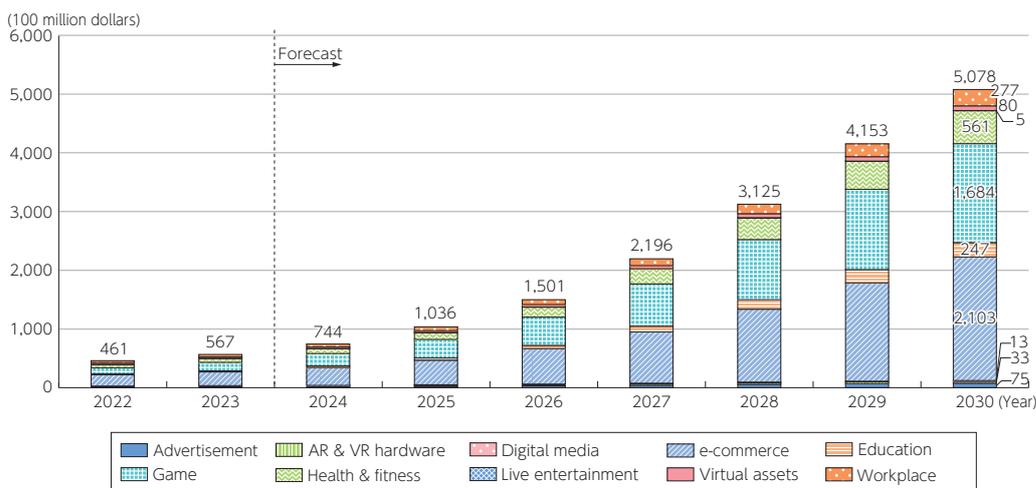
### (2) Metaverse

The global metaverse market is forecasted to expand from 74.4 billion dollars in 2024 to 507.8 billion dollars by 2030 (Figure 2-1-7-4). The largest segment within the metaverse is e-commerce, followed by games and health and fitness. The market is primarily driven by consumer-oriented metaverse services, rather than the hardware needed to enjoy the metaverse.

platforms, content, infrastructure, and XR (VR, AR, MR) devices used in metaverse services<sup>8</sup> is expected to reach 275 billion yen in FY2024, a 47.6% increase from the previous fiscal year, and expand to 1.87 trillion yen by FY2028 (Figure 2-1-7-5). In the future, the market is expected to expand with the advancement of XR devices, development of AI technology, and increase in awareness of the metaverse.

The Japanese metaverse market (including metaverse

Figure 2-1-7-4 Changes and forecasts of the size of the global metaverse market



(Source) Prepared based on Statista (data obtained on February 1, 2025)<sup>9</sup>

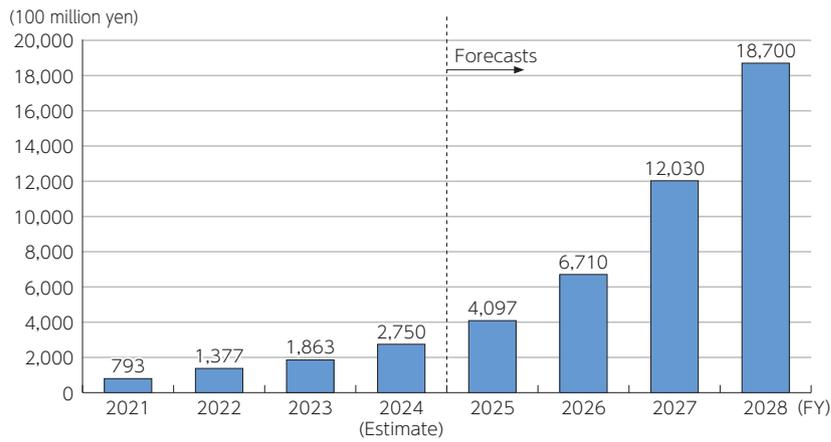
<sup>6</sup> [https://tier4.jp/media/detail/?sys\\_id=6UQblxseKbqGhwFOd0573W&category=NEWS](https://tier4.jp/media/detail/?sys_id=6UQblxseKbqGhwFOd0573W&category=NEWS)

<sup>7</sup> <https://www.statista.com/statistics/428692/projected-size-of-global-autonomous-vehicle-market-by-vehicle-type/>

<sup>8</sup> The figures for platforms, content, and infrastructure are calculated based on sales of business operators, while the figures for XR devices are calculated based on sales prices.

<sup>9</sup> <https://www.statista.com/outlook/amo/metaverse/worldwide>

**Figure 2-1-7-5 Changes and forecasts of the size of the Japan's metaverse market (in terms of sales)**



\*1 The total market size is the sum of metaverse platforms, content, infrastructure, etc., and XR (VR, AR, MR) equipment used in metaverse services. The figures for platforms, content, and infrastructure, etc. are calculated based on sales of business operators, while the figures for XR equipment are calculated based on sales prices.

\*2 The enterprise (corporate) metaverse and consumer metaverse are included in the scope, while game-only metaverse services are excluded.

(Source) Yano Research Institute Ltd., "Metaverse Market in Japan: Key Research Findings 2024" (published on December 17, 2024)

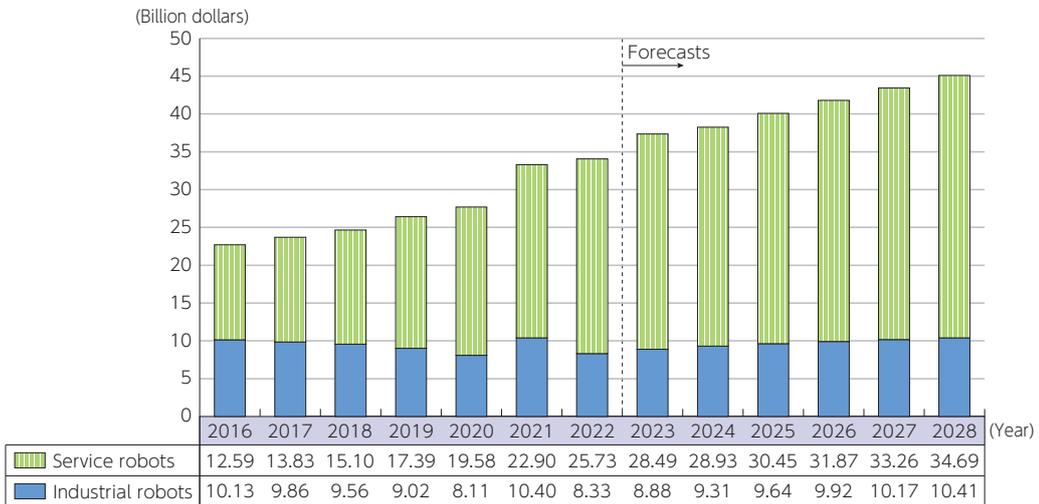
**(3) Robots**

A wide variety of robots are used in various fields, such as among others, industry, home, healthcare, entertainment. In particular, the application of AI technology is expected to lead to the emergence of even more advanced robots.

The global robot market, valued at 34.1 billion dollars in 2022, is projected to grow to 45.1 billion dollars by 2028, representing a compound annual growth rate (CAGR) of 4.8% from 2022 to 2028. Looking at the break-

down, the service robot segment is projected to increase from 25.7 billion dollars in 2022 to 34.7 billion dollars in 2028 (a CAGR of 5.1%), while the industrial robot segment is projected to increase from 8.3 billion dollars in 2022 to 10.4 billion dollars in 2028 (a CAGR of 3.8%). In terms of the trend of the market size since 2016, the service robot segment has been driving the overall growth of the global robot market (Figure 2-1-7-6).

**Figure 2-1-7-6 Changes and forecasts of the size of the global robot market**



(Source) Prepared based on Statista (data obtained on March 12, 2025)<sup>10</sup>

<sup>10</sup> <https://www.statista.com/forecasts/1384829/global-robotics-revenue-by-category>