

# Japan Telecommunications Report Q4 2016

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## Abstracts

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**BMI View:** Japan's mature telecommunications industry is characterised by high-speed internet connections. Operators have enjoyed success in pursuing multi-device strategies due to a high appetite for advanced technology and digital applications. However, the country's economic slowdown brings considerable downside risks to this strategy; which relies on high levels of disposable income. We believe that the future of the Japanese telecommunications market will be driven by the Internet of Things (IoT). With virtually 100% 3G/4G penetration, recent trends are reflective of operators' rush to use this high technological base to push for subscribers to take up higher-value digital services.

### Latest Updates And Industry Developments

Mobile subscriptions grew by 3.5% y-o-y in Q216, despite market saturation, reaching 161.43mn by end-June. Almost 100% of these subscribers are 3G/ 4G users, and this is in line with our 3G/ 4G forecasts of 161.76mn by end-2016, a number which will rise modestly to 164.12mn by end-2020.

The number of broadband connections grew to around 89.52mn by Q216 with high-speed fibre-optic broadband and dedicated mobile broadband leading this subscriber growth. We estimate over 91mn broadband connections by end-2016 and see this number jumping beyond 110mn by the end of 2020.

## Contents

BMI Industry View

SWOT

Telecoms

Industry Forecast

Latest Updates

Structural Trends

Table: Telecoms Sector - Historical Data & Forecasts (Japan 2013-2020)

Industry Risk Reward Ratings

Asia Pacific Risk/Reward Index

Table: APAC Telecoms Risk/Reward Index, Q416

Japan Risk/Reward Index

Market Overview

Latest Updates

Table: Falling ARPUs Across The Board

Mobile Content

Wireline Voice And Broadband

Table: Broadband Subscription Numbers ('000) & (%) Change y-o-y

Regulatory Development

Regulatory Overview

Industry Risks

Table: Division Of Regulatory Responsibilities In Japan

Main Development: Data Pricing And Handset Subsidies

Competitive Landscape

Table: Key Players In Japan

Table: Mobile Market Overview

Table: NTT DoCoMo

Table: KDDI

Table: SoftBank Mobile

Company Profile

KDDI Corporation

NTT Corporation

SoftBank Corp

Demographic Forecast

Demographic Outlook

Table: Population Headline Indicators (Japan 1990-2025)

Table: Key Population Ratios (Japan 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Japan 1990-2025)

Table: Population By Age Group (Japan 1990-2025)

Table: Population By Age Group % (Japan 1990-2025)

Glossary

Table: Glossary Of Terms

Methodology

Industry Forecast Methodology

Sources

Risk/Reward Index Methodology

Table: Risk/Reward Index Indicators

Table: Weighting Of Indicators

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