

Japan Telecommunications Report Q2 2016

<https://marketpublishers.com/r/JC2F8856688EN.html>

Date: March 2016

Pages: 68

Price: US\$ 1,295.00 (Single User License)

ID: JC2F8856688EN

Abstracts

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BMI View: Japan's telecommunications industry is one of the most developed globally, as characterised by high-speed internet connections. Continued growth is largely attributable to operators' success in pursuing multi-device strategies. However, the country's economic slowdown brings considerable downside risks to this strategy; which relies on high levels of disposable income.

Latest Updates And Industry Developments

Mobile subscriptions grew by 2.2% in 2015, despite market saturation, reaching 158.59mn by end- December. 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.

Fixed broadband subscriptions grew by 2.4% y-o-y to reach 40.76mn in Q315. We forecast total broadband subscriptions to reach 146.05mn by end-2020, with high speed fibre-optic broadband and dedicated mobile broadband leading this subscriber growth.

Contents

BMI Industry View

SWOT

Industry Forecast

Japan

Latest Updates

Structural Trends

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

Industry Risk Reward Ratings

Table: Asia Pacific Telecoms Risk/Reward Index - Q2 2016

Japan

Market Overview

Japan

Latest Updates

Structural Trends

Mobile

Table: Falling ARPU Across Operators (JPY)

Mobile Content

Wireline Voice & Broadband

Table: Number Of Broadband Subscriptions ('000)

Regulatory Development

Regulatory Overview

Regulatory Developments

Competitive Landscape

Table: Key Players In Japan

Table: Selected Operator Revenues 2007-2014 (FY end-March 31 unless stated)
(USDmn)

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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