

Japan Telecommunications Report Q3 2016

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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. We believe that the future of the Japanese mobile and telecommunications market as a whole will be driven by advanced technologies such as M2M, Internet of Things (IoT), connected cars and smart devices. With very high rates of 3G/4G penetration, virtually 100%, recent new subscriber growth is largely reflective of the very high degree of technological and new device innovation uptake in the country, rather than traditional and conventional cellular telephone users.

Latest Updates And Industry Developments

Mobile subscriptions grew by 3.7% y-o-y in Q116, despite market saturation, reaching 160.62mn by end-March. 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 82.7mn by the end of 2015 with high-speed fibreoptic broadband and dedicated mobile broadband leading this subscriber growth. We estimate over 91mn broadband connections by 2016 and see this number jumping beyond 110mn by the end of 2020.

Contents

BMI Industry View

SWOT

Japan

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: Asia Pacific Telecoms Risk/Reward Index, Q316

Japan Risk/Reward Index

Market Overview

Latest Updates

Structural Trends

Mobile

Table: Falling ARPUs Across The Board

Mobile Content

Wireline Voice And Broadband

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

Regulatory Development

Regulatory Overview

Table: Division Of Regulatory Responsibilities In Japan

Regulatory Developments

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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