

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.

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