

# Japan - Telecommunication Services: A developed and attractive telecom market (Strategy, Performance and Risk Analysis)

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## Abstracts

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### SUMMARY

This report provides an in depth analysis of the Japanese telecommunication market, exploring the current and forecast trends of the key segments, including fixed and mobile, changes in the competitive landscape, and benchmarking between Japan and the regional and global trends, among much more. Japan is considered a developed and attractive telecom market, offering plenty of room for growth and investments. Within the report, readers will find much more detail on such topics, along with up-to-date data to support all analysis.

MarketLine's Premium industry reports provide a comprehensive market view including sections on: industry risk & reward, key industry trends and drivers, industry SWOT analysis, industry benchmarking to compare key performance indicators with regional and global markets, competitive landscape, and innovation.

### KEY HIGHLIGHTS

Innovative offerings to drive subscriptions

Innovation in the services of operators, such as packaging of services with voice, data and free handsets, subscriptions which involve a commitment for a fixed period of time, handsets locked to the operator, reduced handset price, and increased tariffs in service

plans, have widened the scope for postpaid subscriptions.

Despite this, prepaid subscriptions are leading the market, resulting in an increase of 3.4% CAGR, from 134 million subscriptions in 2012 to 153 million in 2016, and are expected to grow further at 1.5% CAGR during 2016-2021, in order to reach 164.5 million.

#### Improving customer retention lowers churn

A decrease in churn rates indicates higher customer retention in the market. Operators are retaining customers due to rapid problem solving and good customer service. Japan reported a very low churn rate of 10.2% in 2016, compared to the Asia-Pacific region with a rate of 51%. Japan's peer countries also showed to have comparatively high individual churn rates, with 35.3% by China and 20.8% by the South Korea.

#### Limited service differentiation due to restrictions

Adapted by the Japanese Government, there is a strategy that aims to provide a rate plan that considers the various needs of its users, reducing users' monthly payments for smartphone usage. This scheme, coupled with a higher degree of regulations, such guidelines concerning smartphone pricing and subscriber identification module (SIM) unlocking regulations, are a major concern for operators. This is due to the adverse effect both have on the financial position of the operators; as there is not much differentiation rate, the operators have difficulties attracting new customers, whilst competing at the same level with one another.

## SCOPE

Risk/Reward Index - enables you to assess the risks and potential rewards of investing in the Japanese telecommunications market in comparison with other Asia-pacific countries.

Industry Snapshot and Industry View - Key Telecommunications Industry Statistics, including fixed/mobile revenue, subscriptions, churn, market share, and ARPS, are analyzed to reveal the key issues and trends that drive market performance in the Japanese telecommunications market.

Industry SWOT Analysis - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance and investments in the Japanese

telecommunications market.

Industry Benchmarking - Benchmark how the Japanese telecommunications market is performing compared to the regional and global markets in terms of fixed or mobile revenue, subscriptions, ARPS, penetration, and usage to gauge potential for growth or market entry.

Competitive Landscape - Analyze and compare the performance of the leading players in the Japanese telecommunications market through the business segment on metrics such as churn, ARPU, and subscriber and revenue growth.

## **REASONS TO BUY**

An analysis of the market's performance over both the review and forecast period in terms of: revenues, subscribers, ARPU, and customer churn?

How have technological advancements supported operators in maintaining their subscriber base?

What are the key developments in the Japanese telecom market with regards to company/country collaborations and technological innovations?

What are the Japanese telecom market's strengths and weaknesses?

How will mobile data compare with other segments over the forecast period?

What are the primary drivers of the market, and how will they affect the market's sectors: data, prepaid, postpaid, broadband, and IPTV?

What were the key financial deals made between 2015 and 2016?

Who are the key players in the Japanese telecom market and how has this affected the competitive landscape?

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