Turnover for Broadcasting in Japan

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1. Standard classification structure

Japan Standard Industrial Classification (JSIC)

- 38 Broadcasting
  - 381 Public Broadcasting
    - 3811 Public Broadcasting
  - 382 Private-sector Broadcasting
    - 3821 Television Broadcasting
    - 3822 Radio Broadcasting
    - 3823 Satellite Broadcasting
    - 3829 Miscellaneous Private-sector Broadcasting
  - 383 Cablecasting
    - 3831 Cable Television Broadcasting
    - 3832 Cable Radio Broadcasting
2. Surveys of turnover

**Monthly**
- Monthly Survey on Service Industries (MSSI)

**Annual**
- Basic Survey on the Information and Communications Industry

**Periodic**
- Economic Census for Business Activity (ECBA) (every 5 years)
3. Unit of measurement to be collected

MSSI
- 381-Enterprise
- 382, 383-Enterprise & Establishment

Basic Survey on the Information and Communications Industry
- Enterprise

ECBA
- Enterprise & Establishment
4. Market conditions and constraints

- Turnover

  - **381 Public Broadcasting (NHK Only)**
    - Receiving Fee (advertising not allowed)
  
  - **382 Private-sector Broadcasting**
    - Advertising Income
    - Fee-paying Broadcast Income
  
  - **383 Cablecasting**
    - Advertising Income
    - Fee-paying Broadcast Income
4. Market conditions and constraints (Cont.)

- Enterprises and Establishments (1st Feb. 2012)

<table>
<thead>
<tr>
<th>JSIC Group</th>
<th>Enterprises</th>
<th>Establishments</th>
</tr>
</thead>
<tbody>
<tr>
<td>38 Broadcasting</td>
<td>881</td>
<td>1808</td>
</tr>
<tr>
<td>381 Public Broadcasting</td>
<td>1</td>
<td>79</td>
</tr>
<tr>
<td>382 Private-sector Broadcasting</td>
<td>509</td>
<td>789</td>
</tr>
<tr>
<td>383 Cablecasting</td>
<td>371</td>
<td>934</td>
</tr>
</tbody>
</table>

- Turnover (2011)
  - “JSIC38 Broadcasting” accounts for 0.30% turnover of all industries.

(Source: 2012 ECBA by SBJ, METI)
4. Market conditions and constraints (Cont.)

- **Turnover and Workers**

<table>
<thead>
<tr>
<th>Year</th>
<th>Turnover (trillion yen)</th>
<th>Workers (thousand)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>38 Broadcasting</td>
<td>382 Private-sector Broadcasting (percentage of “382” in “38”)</td>
</tr>
<tr>
<td>2009</td>
<td>3.91</td>
<td>2.50 (63.9%)</td>
</tr>
<tr>
<td>2010</td>
<td>4.03</td>
<td>2.56 (63.4%)</td>
</tr>
<tr>
<td>2011</td>
<td>3.65</td>
<td>2.21 (60.5%)</td>
</tr>
<tr>
<td>2012</td>
<td>3.56</td>
<td>2.20 (61.9%)</td>
</tr>
</tbody>
</table>

(Source: MSSI by SBJ)
4. Market conditions and constraints (Cont.)

Revision of MSSI (January, 2013)

- Collect turnover by business activity in addition to turnover by principal industry of entity
- Turnover by principal industry of entity: collect total amount of turnover as turnover of principal industry of entity concerned
- Turnover by business activity: collect turnover breakdowns of top 4 business activities of enterprise
4. Market conditions and constraints (Cont.)

**MSSI: Survey on enterprises**

Turnover by Principal Industry of Enterprise

Enterprise A

- Turnover by Industry of Business Activity (A)
- Turnover by Industry of Business Activity (B)
- Turnover by Industry of Business Activity (C)
- Turnover by Industry of Business Activity (D)
- Turnover by Industry of Business Activity (E)
4. Market conditions and constraints (Cont.)

- Turnover by business activity

Composition ratio of turnover by business activity of enterprises and establishments whose principal industry is Broadcasting (January, 2013)

- 38 Broadcasting: 87.4%
- 37 Communications: 7.4%
- 41 Video picture, sound information, character information production and distribution: 2.0%
- Others: 0.9%
- Service industries other than listed above: 2.3%

(Source: MSSI by SBJ)
4. Market conditions and constraints (Cont.)

- Diversification of Broadcasting
  - Cablecasters function as internet providers
  - Receiving broadcast through internet
  - Broadcast for mobile terminals
  - Video-on-demand through internet
  - Smart televisions
- Revision of classification?
  - Maybe in the future.
5. Turnover data methods

- MSSI (Monthly)
  - Sample survey
  - Questionnaires distributed & collected by mail (also available online)
  - Total turnover of entity, turnover of enterprise by business activity
  - Preliminary results: 2 months after survey
  - Final results: 5 months after survey
  - Missing values occur, estimated value used for tabulation
  - Also collect number of workers, type of legal organization, amount of capital and so on
5. Turnover data methods (Cont.)

- **2012 ECBA**
  - Questionnaires distributed & collected by enumerators or by mail (also available online)
  - Total annual turnover of entity, turnover of entity by business activity
  - Preliminary tabulations released in January (1-digit level) and March (Manufacturing, 2-digit level), 2013
  - Final tabulations released in August (3-digit level), November, 2013 and February, 2014
  - Also collect financial items, and tabulate value added
6. Summary

- Turnover collected by business activity
  - By revision of MSSI, we can grasp monthly turnover by business activity of entities whose principal activity is Broadcasting.

- ECBA
  - In 2012, turnover and other financial items of all entities of all industries were surveyed for the first time.

- Diversification of Broadcasting
  - Grasping figures by business activity will become more important.
Thank you for listening!