

Media Concentration in Japan

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Japan Research Team

- Sponsors
 - FY2008 Information Communications Policy Forum
 - FY2009 Japan Society of Information and Communication Research
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Newspaper Market

	1984	1988	1992	1996	2000	2004	2006
Yomiuri Shimbun	18.4	18.9	19.6	19.6	19.6	19.6	19.2
Asahi Shimbun Company	15.7	15.7	16.6	16.2	15.9	16.1	15.4
Mainichi Newspapers	8.9	8.2	8.1	7.7	7.7	7.7	7.6
Nikkei Inc,	4.3	5.0	5.9	5.7	5.4	5.9	5.8
Sankei Shimbun Co.,Ltd.	4.1	4.0	3.9	3.8	3.8	4.1	4.2
Chunichi Shimbun	6.1	5.9	6.2	6.3	6.9	6.8	7.0
Hokkaido Shimbun Press	—	—	2.3	2.3	2.4	2.4	2.3
Nishinippon Shimbun Co.,Ltd	—	—	1.6	1.6	1.6	1.6	1.6
Others	42.5	42.3	36.0	36.7	36.8	35.9	36.9
C4	49.1	48.6	50.3	49.9	50.0	50.1	49.2
HHI	752	761	829	814	805	818	784
# of Newspaper Publishers	121	121	121	121	121	121	121
# of Circulation (thousand copies)	47,515	50,598	49,948	51,571	51,890	51,408	52,310

Terrestrial Radio Market

	1984	1988	1992	1996	2000	2004	2008
Tokyo Broadcasting System	9.8	8.2	7.4	6.1	6.0	7.0	6.9
Nippon Cultural Broadcasting	9.0	9.0	7.6	6.8	4.3	4.8	4.7
Nippon Broadcasting System	14.5	14.2	14.9	14.3	14.5	12.9	11.5
Mainichi Broadcasting System	3.9	3.8	3.7	3.6	3.9	2.5	2.3
Tokai Radio Broadcasting	4.0	4.0	4.2	4.3	2.0	1.9	1.8
Tokyo FM	7.1	8.7	7.1	9.2	11.9	12.1	7.7
FM802	—	1.2	3.0	2.2	2.0	1.9	1.8
Others	51.7	50.9	52.1	53.5	55.4	56.0	61.9
C4	40.4	40.1	37.0	36.4	36.7	36.8	30.8
HHI	543	520	474	451	468	438	318
# of Stations	61	77	89	128	225	241	320
Market vol. (¥ mil.)	177,196	229,869	277,377	281,150	262,962	226,212	195,298

Terrestrial TV Market

	1984	1988	1992	1996	2000	2004	2006
NTV Network	18.5	18.7	17.9	19.5	20.5	19.2	18.5
TBS Network	19.4	19.6	17.5	17.4	16.8	17.0	17.5
Fuji Television Network	19.1	21.4	21.9	21.2	21.3	22.1	22.0
TV Asahi Network	14.1	14.3	14.2	14.9	14.8	14.9	15.3
TV Tokyo Network	3.0	3.7	4.4	4.6	4.8	5.0	5.2
NHK	22.9	19.5	21.2	19.3	19.0	19.2	18.9
Others	2.6	2.6	2.6	2.7	2.5	2.3	2.4
C4	80.0	79.2	78.5	77.5	77.6	77.6	77.0
HHI	1,827	1,797	1,784	1,761	1,766	1,770	1,759
# of Networks	6	6	6	6	6	6	6
Market vol. (¥ bil.)	1,470	1,832	2,334	2,670	2,891	2,929	2,922

Wireline Telecommunications Market

		1984	1988	1992	1996	2000	2004	2008
NTT	PSTN	100.0	100.0	99.6	98.1	89.2	83.5	67.2
	ISDN	--	0.0	0.3	1.7	10.6	14.2	10.9
	Sub-total	100.0	100.0	99.9	99.8	99.8	97.7	78.0
Other Dry Copper Carriers	KDDI	--	--	--	--	--	--	5.6
	SBT	--	--	--	--	--	--	2.4
	Other PSTN	--	--	0.1	0.1	0.2	2.2	0.8
	Other ISDN	--	--	--	0.1	0.0	0.1	0.1
	Sub-total	--	--	0.1	0.2	0.2	2.3	8.8
IP Telephone	NTT	--	--	--	--	--	--	9.6
	KDDI	--	--	--	--	--	--	1.4
	K-opt.com	--	--	--	--	--	--	0.9
	Others	--	--	--	--	--	--	1.4
	Sub-total	--	--	--	--	--	--	13.2
C4		100.0	100.0	100.0	100.0	100.0	100.0	93.2
HHI		10,000	10,000	9,982	9,961	9,968	9,548	7,729
# of Subscribers (in thousand)		42,880	48,420	56,420	62,200	62,150	60,260	58,990

Wireless Telecommunications Market

		1984	1988	1992	1996	2000	2004	2008
Cellular	NTT	100.0	100.0	61.4	--	--	--	--
	NTT Docomo	--	--	--	48.4	51.6	53.2	49.7
	IDO G	--	--	38.6	11.1	6.9	--	--
	Cellular G	--	--	--	24.8	11.0	--	--
	Tu-ka G	--	--	--	--	6.1	4.2	--
	au	--	--	--	--	--	19.5	28.3
	Digital Phone G	--	--	--	15.8	--	--	--
	J-Phone G	--	--	--	--	14.4	--	--
	Vodafone	--	--	--	--	--	--	--
	Softbank	--	--	--	--	--	17.2	17.3
	EMobile	--	--	--	--	--	--	0.4
PHS	DDI Pocket	--	--	--	--	5.8	3.3	--
	NTT Docomo	--	--	--	--	2.5	1.8	--
	Astel	--	--	--	--	1.7	0.7	--
	Willcom	--	--	--	--	--	--	4.3
C4	100.0	100.0	100.0	100.0	83.8	94.1	99.6	
HHI	10,000	10,000	4,515	3,325	3,509	3,865	3,591	
# of Subscribers (in thousand)	27	151	1,378	10,203	56,849	87,057	107,340	

ISP Market

	2001.9	2002.9	2003.9	2004.12	2005.12	2006.12	2007.12
Top 3	56.7	51.2	46.9	59.6	60.7	60.8	58.9
HHI	1390	1197	1094	1509	1526	1588	1554

	1996	2000	2004	2007
Nifty	33.7	16.8	14.1	--
Infoweb	3.1	Nifty	Nifty	--
Softbank BB	--	--	12.8	17.0
NTT Communications	--	8.2	12.0	20.0
NEC	33.0	13.2	11.2	7.2
KDDI	--	6.6	7.6	7.6
Nippon Telecom	--	5.5	--	--
Asahi Net/People	10.2	--	--	--
Microsoft Network	3.6	--	--	--
NTT Plala	--	--	--	7.5
Others	16.4	49.7	42.3	40.7
C4	80.0	44.8	50.1	52.1
HHI	2,351	598	690	855
# of Providers	N/A	N/A	N/A	N/A
# of Subscribers (in thousand)	6,858	27,400	37,530	28,300

Above: MIC Report

Left: Nikkei Sangyo Shimbun Report

Observations

- HHIs are relatively stable except ISP market
 - Latest: Newspaper 784, Radio 318, TV 1,759, Wireline 7,729, Wireless 3,591, ISP 1,554 or 855
- Regulation and competition policy influence to HHI
 - Licensing to community FM stations reduces radio market HHI from 543 to 318
 - Introduction of competition in wireless comm. market results decrease in HHI from 10,000 to 3,591
- HHI calculation of new market e.g. ISP is difficult because of the lack of market data