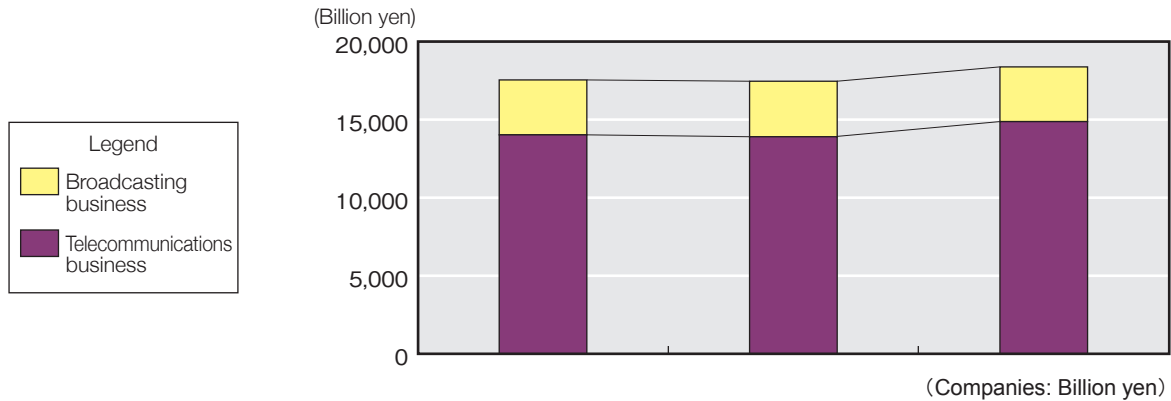


**Chapter 1**  
**Movements in the Info-communications**  
**Industry As a Whole**

## 1-1 Trends of Sales in the Communications and Broadcasting Industry



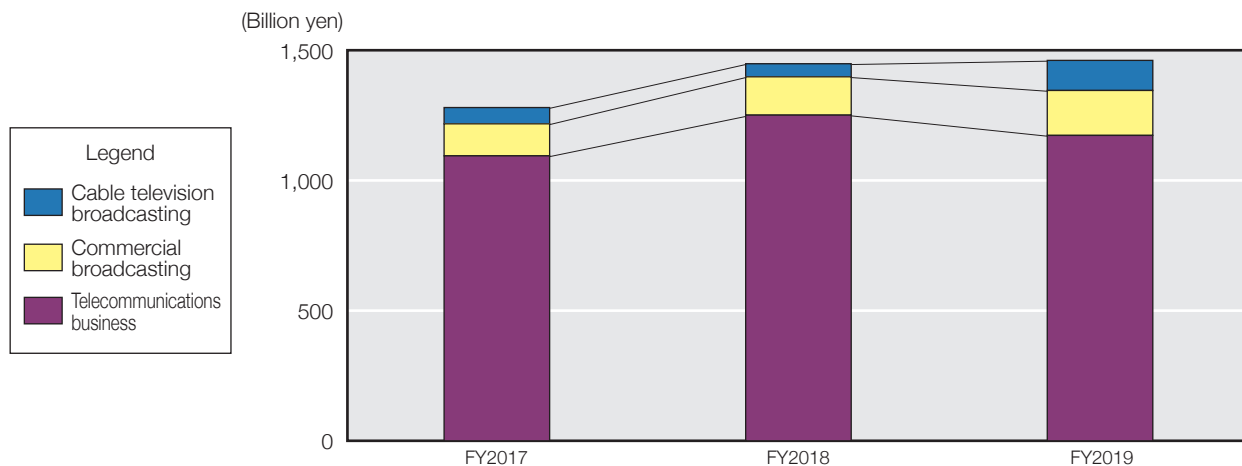
	FY2017		FY2018		FY2019	
	Number of companies	Sales amount	Number of companies	Sales amount	Number of companies	Sales amount
Communications and broadcasting industry in total	946	17,541.2	976	17,457.8	948	18,376.0
Telecommunications business	375	14,023.8	403	13,903.2	407	14,872.6
Broadcasting business	571	3,517.4	573	3,554.6	541	3,503.3
Commercial broadcasting	359	2,320.7	376	2,387.5	351	2,252.3
Cable television broadcasting	211	479.0	196	429.8	189	513.7
NHK	1	717.7	1	737.3	1	737.3

Note: The data on NHK are based on Published Material

The aging comparison requires attention on the grounds that the number of valid responses varies from year to year

\*Compiled by TCA based on data publicized by the Ministry of Internal Affairs and Communications

## 1-2 Trends in Amounts of Investment in Plant and Equipment Acquired by the Communications and Broadcasting Industry

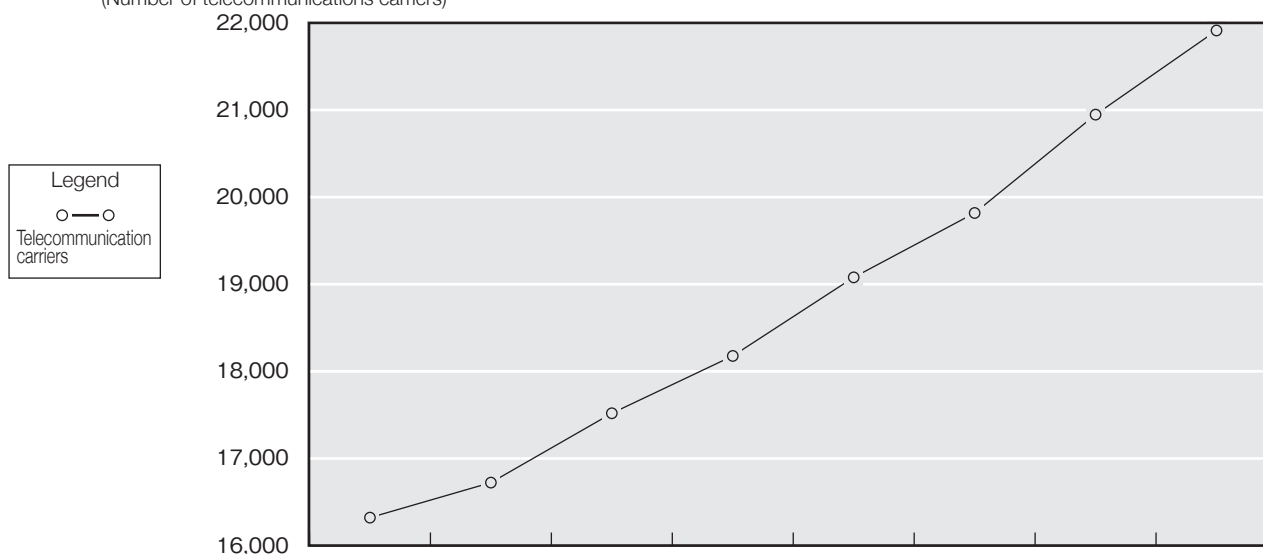


		Communications and Broadcasting Industry		Telecommunications business		Broadcasting business		Commercial broadcasting		Cable television broadcasting	
		companies	Billion yen	companies	Billion yen	companies	Billion yen	companies	Billion yen	companies	Billion yen
Amount of FY2017	Amounts of investment in plant and equipment	561	1,279.9	205	1,094.4	356	185.5	198	123.0	158	62.5
	Amounts of investment in plant and equipment (except software)	550	1,151.5	199	978.4	351	173.0	194	111.3	157	61.8
	Software	249	128.5	91	116.0	158	12.5	110	11.7	48	0.8
Amount of FY2018	Amounts of investment in plant and equipment	599	1,448.1	232	1,250.8	367	197.4	209	147.2	158	50.1
	Amounts of investment in plant and equipment (except software)	574	1,282.9	218	1,099.4	356	183.5	201	134.8	155	48.6
	Software	281	165.2	109	151.3	172	13.9	125	12.4	47	1.5
Amount of FY2019	Amounts of investment in plant and equipment	561	1,461.0	216	1,172.9	345	288.2	196	172.6	149	115.5
	Amounts of investment in plant and equipment (except software)	542	1,246.0	204	971.2	338	274.8	190	161.0	148	113.8
	Software	274	215.1	106	201.7	168	13.3	119	11.6	49	1.7

Note: The aging comparison requires attention on the grounds that the number of valid responses varies from year to year  
 \*Compiled by TCA based on data publicized by the Ministry of Internal Affairs and Communications

## 1-3 Trend of the Number of Telecommunications Carriers

(Number of telecommunications carriers)

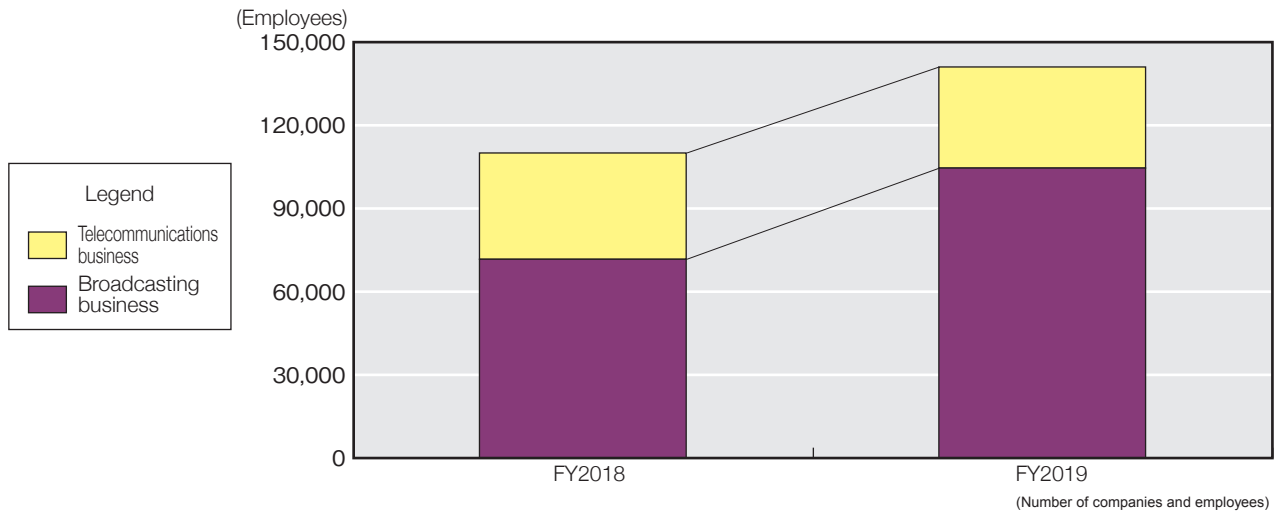


(Companies)

(Figures are current as of the end of each fiscal year.)	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020
Number of telecommunications carriers	16,321	16,723	17,519	18,177	19,079	19,818	20,947	21,913

\*Compiled by TCA based on data publicized by the Ministry of Internal Affairs and Communications

### 1-4 Number of Employees in the Communications and Broadcasting Industry (by Type of Service and Type of Employment)



	Communications and Broadcasting Industry		Telecommunications business		Broadcasting business		Commercial broadcasting		Cable television broadcasting	
	FY2018	FY2019	FY2018	FY2019	FY2018	FY2019	FY2018	FY2019	FY2018	FY2019
Number of companies	891	896	348	374	543	522	362	342	181	180
Number of employees	110,016	141,033	71,685	104,578	38,331	36,455	30,579	25,875	7,752	10,580
Number of regular employees	109,477	140,359	71,673	104,516	37,804	35,843	30,064	25,265	7,740	10,578
Permanent employees	84,463	100,840	53,800	71,523	30,663	29,317	24,599	20,662	6,064	8,655
Non-permanent employees (part-time workers, etc.)	12,211	20,193	8,006	16,227	4,205	3,966	3,296	2,634	909	1,332
Employees detached to other companies/organizations	10,132	13,098	9,171	12,116	961	982	884	718	77	264
Temporary employees	539	674	12	62	527	612	515	610	12	2
Dispatched employees	17,109	22,524	10,639	15,899	6,470	6,625	5,887	5,649	583	976
Number of employees per company	123	157	206	280	71	70	84	76	43	59

Note: The aging comparison requires attention on the grounds that the number of valid responses varies from year to year  
 \*Compiled by TCA based on data publicized by the Ministry of Internal Affairs and Communications