

## Section 3 Trends in the broadcasting and content field

### 1. Broadcasting

#### (1) Size of the broadcasting market

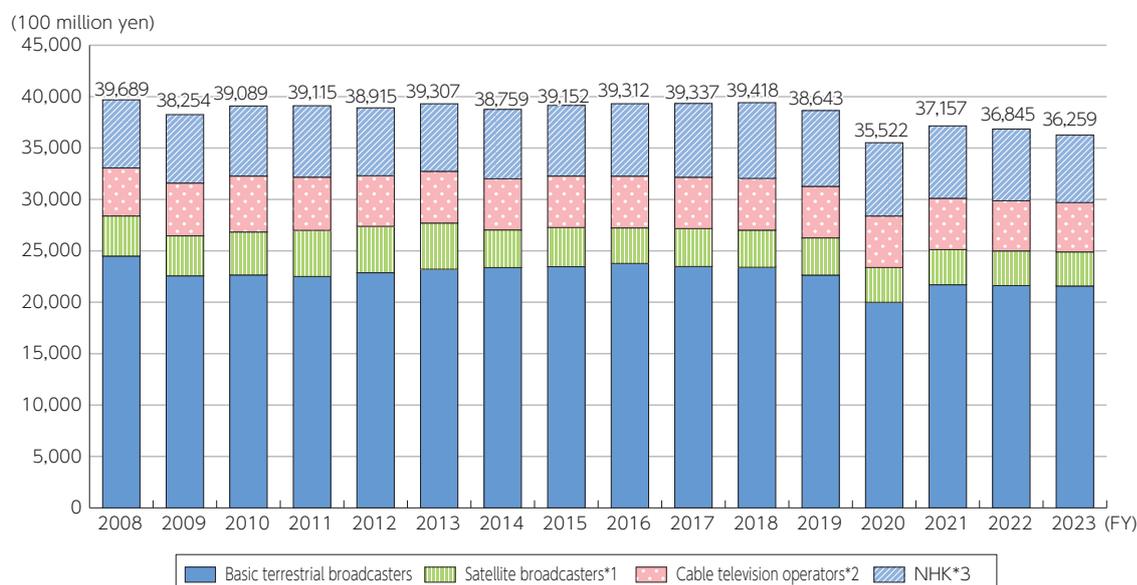
##### A Revenue of broadcasters

In Japan, broadcasting is conducted under a dual system consisting of NHK, which is funded by receiving fees, and private broadcasters, which are funded by advertising revenue or subscription fees for paid broadcasting. Additionally, the Open University of Japan Foundation broadcasts for educational purposes.

The total revenue of all broadcasters, including both broadcasting and non-broadcasting income, decreased from FY2022, amounting to 3.6259 trillion yen in FY2023, a 1.6% decrease from the previous fiscal year.

Breaking it down, the total revenue of private basic terrestrial broadcasters was 2.1582 trillion yen (a 0.2% decrease from the previous fiscal year), the total revenue of private satellite broadcasters was 331.5 billion yen (a 1.6% decrease from the previous fiscal year), the total revenue of cable television operators was 479.5 billion yen (a 1.7% decrease from the previous fiscal year), and NHK's operating revenue was 656.7 billion yen (a 5.8% decrease from the previous fiscal year) (Figure 2-1-3-1).

Figure 2-1-3-1 Changes in the size of the broadcasting industry market (total sales) and market breakdown



\*1 Calculated based on operating revenues related to the satellite broadcasting business.

\*2 Up to FY2010, cable TV operators were commercial corporations that conducted independent broadcasting using facilities approved under the former Cable Television Broadcasting Act (including facilities registered under the former Broadcasting Act for Use of Telecommunications Services that uses a broadcasting system equivalent to the facilities), and from FY2011, cable television operators are registered general broadcasters (limited to commercial corporations) that conduct independent broadcasting using cable telecommunications equipment (with both excluding operators using the IP multicast method).

\*3 NHK's value is ordinary business income.

\*4 Community broadcasters who are also engaged in cable television are excluded.

(Source) Prepared based on MIC "Income and Expenditures of Private Broadcasters" and NHK "Financial Statements" for each FY

Additionally, the advertising expenses for private basic terrestrial broadcasters in 2024 amounted to 1.7513 trillion yen, with 1.6351 trillion yen related to television

broadcasting and 116.2 billion yen related to radio broadcasting<sup>1</sup>.



#### Figure (related data) Changes in advertising expenditures of private basic terrestrial broadcasters

Source: Prepared based on Dentsu "Advertising Costs in Japan"

URL: <https://www.soumu.go.jp/johotsusintokei/whitepaper/ja/r07/html/datashu.html#f00164>

(Data collection)

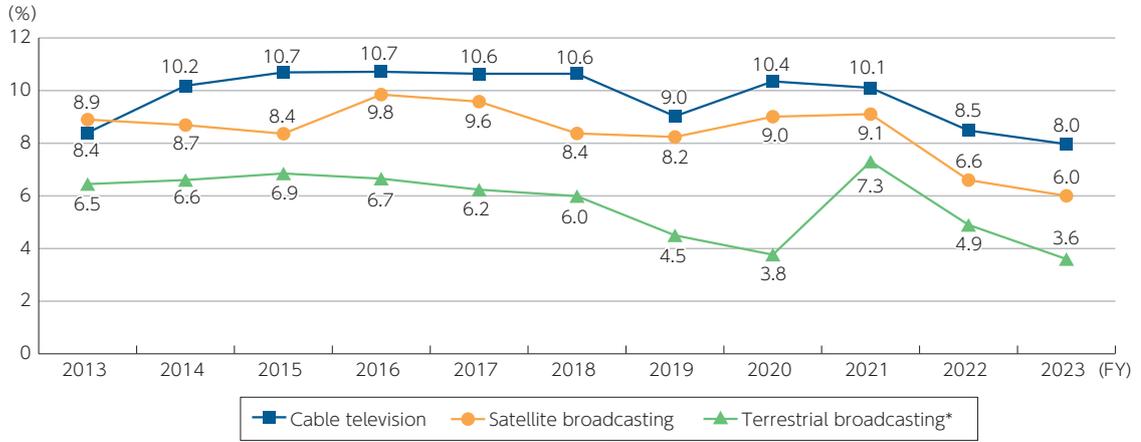
<sup>1</sup> Regarding the entire advertising market, refer to "2 Advertising" in, Part 2, Chapter 1, Section 3, Item 2(2) "Advertising."

**B Financial status of private broadcasters**

Looking at each category as a whole, private basic terrestrial broadcasters (with an operating profit margin of 3.6% in FY2023), private satellite broadcasters (6.0% in

the same period), and cable television operators (8.0% in the same period) all continued to secure profits in FY2023, following FY2022 (Figure 2-1-3-2).

**Figure 2-1-3-2 Changes in the operating profit margin of private broadcasters**



\* Basic terrestrial broadcasting excluding community broadcasting

(Source) Prepared based on MIC "Income and Expenditures of Private Broadcasters" for each FY, etc.

**(2) Number of operators**

As of the end of FY2024, the breakdown of the number of private broadcasters is as follows: 540 companies for private basic terrestrial broadcasters (including 346

companies conducting community broadcasting) and 39 private satellite broadcasters (Figure 2-1-3-3).

Figure 2-1-3-3 Changes in the number of private broadcasters

End of FY			2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Terrestrial	Television broadcasting (single operation)	VHF	16														
		UHF	77	93	93	94	94	98	94	94	95	95	95	96	96	96	96
	Radio broadcasting (single operation)	Medium-wave (AM) broadcasting	13	13	13	14	14	14	14	14	15	15	15	16	16	16	16
		Ultrashort wave (FM) broadcasting	298	307	319	332	338	350	356	369	377	384	384	388	390	393	396
		Community broadcasting of the above	246	255	268	281	287	299	304	317	325	332	334	338	339	342	346
		Short wave	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
	Television/radio broadcasting (combined operation)	34	34	34	33	33	33	33	33	33	32	32	32	31	31	31	31
	Text broadcasting (single operation)	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Multimedia broadcasting				1	1	1	4	4	4	6	6	2	2	0	0	0
	Subtotal		440	449	461	475	481	500	502	515	526	533	529	534	534	537	540
Satellite	Basic satellite broadcasting	BS broadcasting	20	20	20	20	20	20	19	19	22	22	20	22	21	21	20
		110 degrees east longitude CS broadcasting	13	13	22	23	23	23	23	20	20	20	20	20	20	20	20
	General satellite broadcasting	91	82	65	45	7	5	4	4	4	4	4	4	4	3	2	
	Subtotal	113	108	92	72	46	44	41	39	41	41	39	42	42	41	39	
Cable television	General cable broadcasting pertaining to registration (limited to operators of independent broadcasting)	Broadcasting using former authorized facilities (limited to operators of independent broadcasting)	502														
		Broadcasting using former cable services under the former Act Concerning Broadcast on Telecommunications Services	26	556	545	539	520	510	508	504	492	471	464	464	456	452	–
		IP multicast broadcasting of the above	5	5	4	3	3	3	5	5	5	5	5	4	3	3	–
	Subtotal	528	556	545	539	520	510	508	504	492	471	464	464	456	452	–	

\*1 The number of television broadcasters (single operation) at the end of FY2015 includes five operators conducting basic terrestrial broadcasting for mobile reception (one of them concurrently operated basic terrestrial broadcasting).

\*2 Regarding satellite broadcasters, BS broadcasting and 110 degrees east longitude CS broadcasting are counted as basic satellite broadcasting, while other satellite broadcasting is counted as general satellite broadcasting based on the Broadcast Act amended and enforced in June 2011.

\*3 Because some of the satellite broadcasters concurrently operate more than one of “BS broadcasting,” “110 degrees east longitude CS broadcasters” and “general satellite broadcasting,” sum of the values of the columns does not agree with the value of subtotal. Only operating broadcasters are included in FY2011 and after.

\*4 Regarding cable television operators, up to FY2010, former approved facilities operators under the former Cable Television Broadcast Act and registered operators under the former Act Concerning Broadcast on Telecommunications Services were included, and from FY2011, registered general broadcasters conducting independent broadcasting using cable telecommunications facilities under the Broadcast Act are included (regarding IP multicast broadcasting, up to FY2010, it was included in former broadcasting using cable services, and from FY2011 it has been included in registered general broadcasters conducting independent broadcasting using cable telecommunications facilities).

(Source) Prepared based on MIC “Current State of Cable Television”<sup>2</sup> (only the values for cable TV operators)

### (3) Status of the provision of broadcasting service

#### A Terrestrial television broadcasting

As of the end of FY2024, there are 127 companies nationwide (including 31 companies with dual operations) conducting terrestrial private television broadcasting.



Figure (related data) Number of available private television broadcasting channels (as of end of FY2024)

URL: <https://www.soumu.go.jp/johotsusintokei/whitepaper/ja/r07/html/datashu.html#f00167>  
(Data collection)

#### B Terrestrial radio broadcasting

For AM broadcasting, 47 private basic terrestrial broadcasters (as of the end of FY2024) are conducting broadcasts.

For FM broadcasting, 396 private basic terrestrial broadcasters (as of the end of FY2024) are conducting broadcasts. Among these, there are 346 community

broadcasters, which generally target specific areas within a single municipality.

For shortwave broadcasting, one private basic terrestrial broadcaster (as of the end of FY2024) is conducting broadcasts.

#### C Multimedia broadcasting

As of the end of FY2024, there are no operators conducting V-Low multimedia broadcasting, which utilizes

the frequency band of 99MHz-108MHz made available by the digitalization of terrestrial television broadcasting.

<sup>2</sup> [https://www.soumu.go.jp/main\\_content/000975399.pdf](https://www.soumu.go.jp/main_content/000975399.pdf)

**D Satellite broadcasting**

**(A) Basic satellite broadcasting**

For BS broadcasting, NHK, the Open University of Japan, and private broadcasters (20 companies as of the end of FY2024) are conducting broadcasts using artificial satellites operated by Broadcasting Satellite System Corporation, with 9 of these companies conducting

4K/8K satellite broadcasting. Additionally, for CS broadcasting at 110 degrees east longitude, private broadcasters (20 companies as of the end of FY2024) are conducting broadcasts using satellites operated by SKY Perfect JSAT Corporation.

**(B) General satellite broadcasting**

For general satellite broadcasting, private broadcasters (2 companies as of the end of FY2024) are conduct-

ing broadcasts using satellites operated by SKY Perfect JSAT Corporation.

**E Cable television**

As of the end of FY2023, there were 452 cable television operators. Cable television provides multi-channel broadcasting, including retransmission of terrestrial and satellite broadcasting as well as independent broadcasting channels. The number of households receiving

services through wired telecommunications facilities (with 501 or more terminals) for conducting independent broadcasting is approximately 31.84 million households, with a household penetration rate of approximately 52.4% (Figure 2-1-3-4).

**Figure 2-1-3-4 Changes in the number of subscribed households and penetration rate for receiving services from cable telecommunications equipment that provide independent broadcasting as per their registration**



\*1 The penetration rate is calculated from the number of households in the Basic Resident Register.

\*2 "The number of subscribed households" means the total number of households (including the number of households with radio interference) connected to the cable telecommunications equipment as per their registration.

(Source) Prepared based on MIC "Current State of Cable Television"<sup>3</sup>

**(4) Status of NHK**

**A Domestic broadcasting by NHK**

As of the end of FY2024, NHK's domestic broadcasting channels include 2 terrestrial television channels, 3

radio channels, and 3 satellite television channels.



**Figure (related data) Domestic broadcasting of NHK (as of end of FY2024)**

URL: <https://www.soumu.go.jp/johotsusintokei/whitepaper/ja/r07/html/datashu.html#f00171>  
(Data collection)

**B International television and radio broadcasting by NHK**

NHK's international television and radio broadcasts are aimed at Japanese expatriates and foreigners, cover-

ing almost the entire world.



**Figure (related data) Status of international television and radio broadcasting by NHK (plan as of April 2025)**

URL: <https://www.soumu.go.jp/johotsusintokei/whitepaper/ja/r07/html/datashu.html#f00171>  
(Data collection)

<sup>3</sup> [https://www.soumu.go.jp/main\\_content/000975399.pdf](https://www.soumu.go.jp/main_content/000975399.pdf)

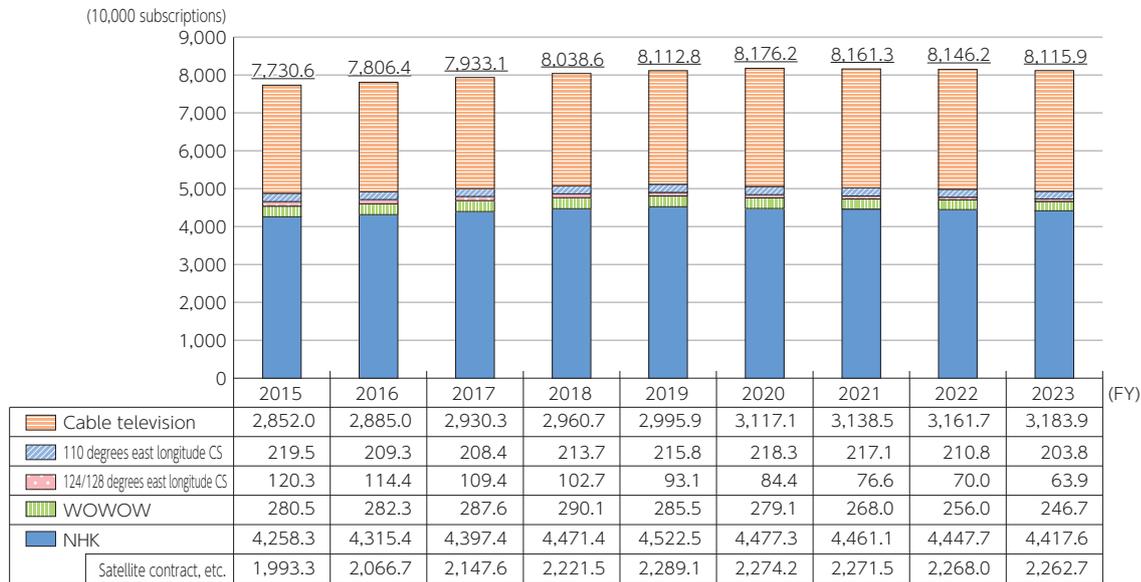
**(5) Utilization of broadcasting services**

**A Number of subscribers**

In FY2023, the number of subscribers to broadcasting services increased for cable television, while it de-

creased for other broadcasting services (Figure 2-1-3-5).

**Figure 2-1-3-5 The number of subscribers to broadcasting services**



\*1 The number of subscribers to terrestrial broadcasting (NHK) is the number of NHK subscriptions of all subscription types.

\*2 The number of subscribers to satellite contracts, etc. is the number of NHK satellite contracts and special contracts.

\*3 The number of WOWOW subscribers is the number of WOWOW subscriptions.

\*4 The number of subscribers of 124/128 degrees east longitude CS is the number of Sky Perfect! premium service subscriptions.

\*5 The number of subscribers of 110 degrees east longitude CS is the number of Sky Perfect! subscriptions.

\*6 The number of households subscribed to cable television is the number of households subscribed to cable telecommunications equipment that carry out independent broadcasting as per their registration.

(Source) Prepared based on material from the Japan Electronics and Information Technology Industries Association, Japan Cable Laboratories, and NHK, and the MIC "Current State of Satellite Broadcasting" and "Current State of Cable Television"

**B The number of NHK receiving contracts**

As of FY2023, the number of NHK receiving contracts was approximately 44.18 million. Of these, terrestrial contracts (including standard and color contracts) ac-

counted for about 21.55 million, satellite contracts for about 22.61 million, and special contracts for about 0.02 million (Figure 2-1-3-6).

**Figure 2-1-3-6 Changes in the number of subscribers of NHK**



(Source) Prepared based on NHK's materials.

**(6) Ensuring the safety and reliability of broadcasting equipment**

Broadcasting serves as a highly important public utility, providing essential information for daily life and criti-

cal information such as disaster alerts instantaneously and widely. Therefore, the broadcasting equipment that

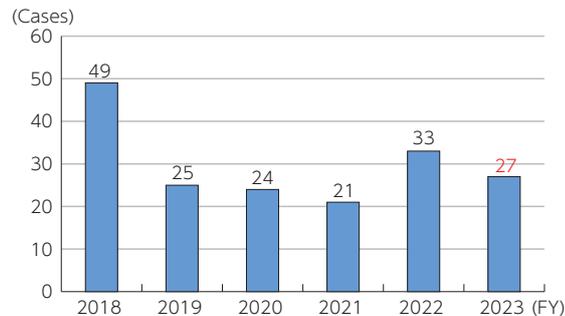
supports this service must meet high standards of safety and reliability.

In FY2023, there were 344 incidents of broadcasting interruptions, of which 27 were classified as major incidents<sup>4</sup>, accounting for approximately 8% of the total (Figure 2-1-3-7). In response, measures to prevent recurrence of such incidents are being rigorously implemented by each broadcaster, and efforts to share incident cases within the indus-

try are being promoted to prevent similar incidents.

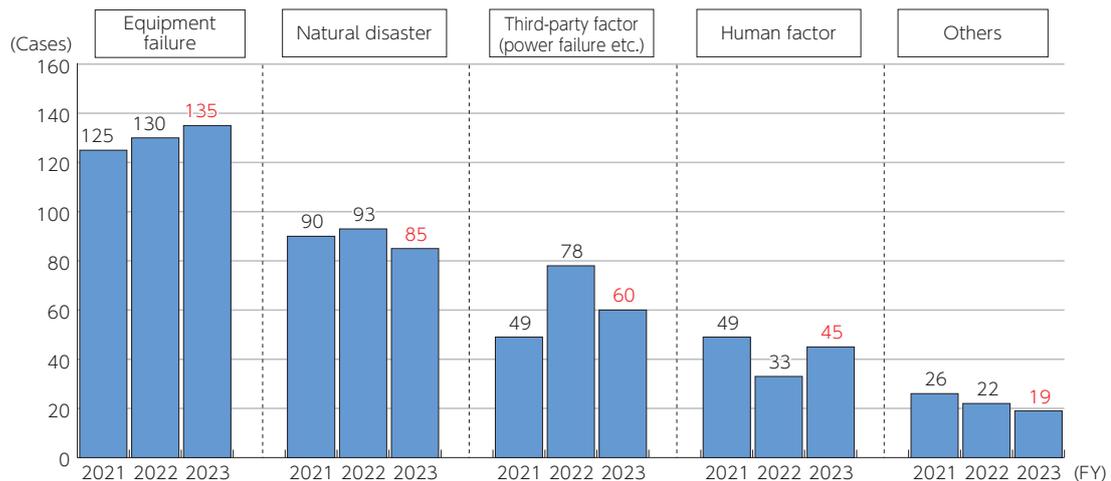
The number of broadcasting interruption incidents for terrestrial and satellite broadcasting was 255, the lowest since the start of data collection in FY2011. The number of incidents for general cable broadcasting was 89, showing a decreasing trend. The most common cause of broadcasting interruptions was equipment failure, followed by natural disasters (Figure 2-1-3-8).

Figure 2-1-3-7 Changes in the number of serious accidents



(Source) Prepared based on MIC "State of the Occurrence of Broadcasting Suspension Accidents"<sup>5</sup> (FY2023)

Figure 2-1-3-8 Changes in the number of broadcasting suspension accidents by cause



(Source) Prepared based on MIC "State of the Occurrence of Broadcasting Suspension Accidents"<sup>6</sup> (FY2023)

## 2. Content market

### (1) Size of Japan's content market

#### A Market overview

The size of Japan's content market in 2023 was 12.5833 trillion yen. In terms of market composition by type of content, video-based content accounted for nearly 60% of the total. Text-based content made up about 35%, and audio-based content accounted for approximately 7%<sup>7</sup> (Figure 2-1-3-9).

The size of the content market saw a significant increase in 2021, and has remained roughly at the same level since then. By type of content, text-based and audio-based content showed an increasing trend (Figure 2-1-3-10).

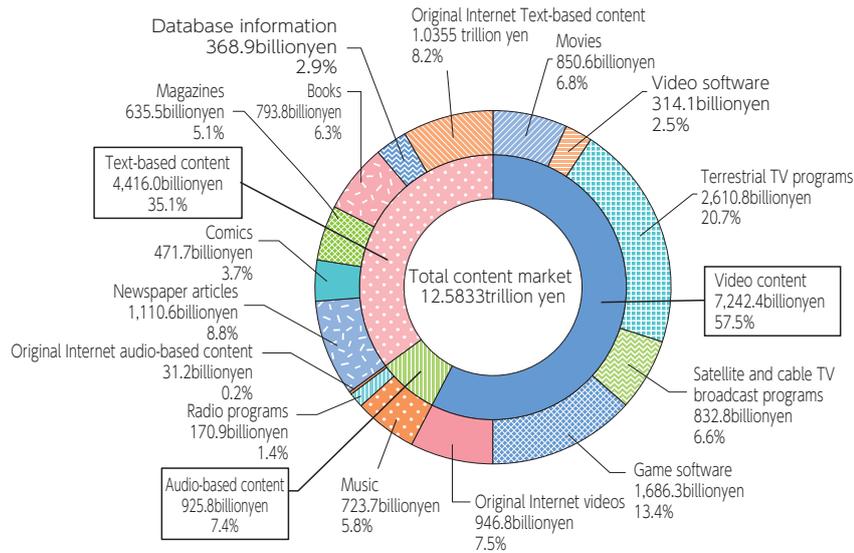
<sup>4</sup> Accidents falling under Articles 113, 122 or 137 of the Broadcasting Act: "If the suspension of broadcasting caused by the equipment for basic broadcasting or other major accident stipulated in the Ministerial Ordinance of the Ministry of Internal Affairs and Communications occurs, the approved basic broadcaster must report such matter as well as the reason or cause without delay to the Minister for Internal Affairs and Communications."

<sup>5</sup> [https://www.soumu.go.jp/menu\\_seisaku/ictseisaku/housou\\_suishin/hoso\\_teishijiko.html](https://www.soumu.go.jp/menu_seisaku/ictseisaku/housou_suishin/hoso_teishijiko.html)

<sup>6</sup> [https://www.soumu.go.jp/menu\\_seisaku/ictseisaku/housou\\_suishin/hoso\\_teishijiko.html](https://www.soumu.go.jp/menu_seisaku/ictseisaku/housou_suishin/hoso_teishijiko.html)

<sup>7</sup> Rather than aggregating by media, market size was calculated and analyzed after aggregation according to distribution stage such as primary distribution and multi-use with a focus on the original nature of the content.

**Figure 2-1-3-9 Breakdown of the Japanese content market (2023)**



(Source) MIC Institute for Information and Communications Policy "Survey on Media/Software Production and Distribution"

**Figure 2-1-3-10 Changes in the size of the Japanese content market (by content type)**



(Source) MIC Institute for Information and Communications Policy "Survey on Media/Software Production and Distribution"

**B Status of multi-use**

The size of the primary distribution market in 2023 was 9.5898 trillion yen, accounting for about 75% of the total market. The breakdown of the primary distribution market is as follows: video-based content at 5.5128 trillion yen, text-based content at 3.3023 trillion yen, and audio-based content at 774.7 billion yen.

On the other hand, the size of the multi-use market was 2.9936 trillion yen, showing a slight decrease from the previous year. The breakdown is as follows: video-based content at 1.7287 trillion yen, text-based content at 1.1137 trillion yen, and audio-based content at 151.1 billion yen.



**Figure (related data) Breakdown of primary distribution market (2023)**  
 Source: MIC Institute for Information and Communications Policy "Survey on Media/Software Production and Distribution"  
 URL: <https://www.soumu.go.jp/johotsusintokei/whitepaper/ja/r07/html/datashu.html#f00178>  
 (Data collection)



**Figure (related data) Breakdown of multi-use market (2023)**  
 Source: MIC Institute for Information and Communications Policy "Survey on Media/Software Production and Distribution"  
 URL: <https://www.soumu.go.jp/johotsusintokei/whitepaper/ja/r07/html/datashu.html#f00179>  
 (Data collection)

**C Communication-based content market**

Within the content market, the size of the communication-based content market, which includes content delivered via the Internet to PCs and smart phones, was 6.0672 trillion yen. In terms of market composition by type of content, video-based content accounted for 56.5%, text-

based content for 34.4%, and audio-based content for 9.1%. The size of the communication-based content market continues to grow. By type of content, the market size is growing for all types of content.



**Figure (related data) Breakdown of the communication content market (2023)**

Source: MIC Institute for Information and Communications Policy “Survey on Media/Software Production and Distribution”  
 URL: <https://www.soumu.go.jp/johotsusintokei/whitepaper/ja/r07/html/datashu.html#f00180>  
 (Data collection)



**Figure (related data) Changes in the size of the communication content market (by content type)**

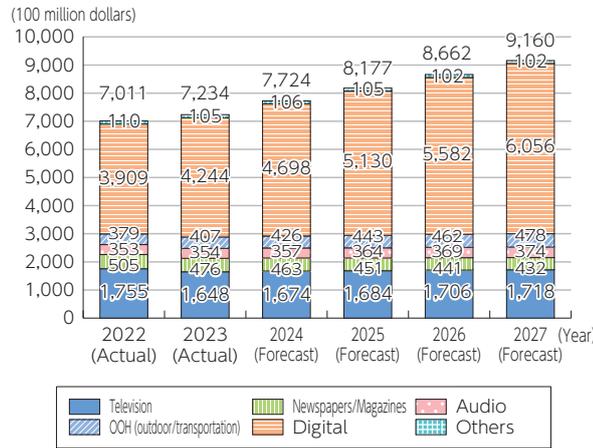
Source: MIC Institute for Information and Communications Policy “Survey on Media/Software Production and Distribution”  
 URL: <https://www.soumu.go.jp/johotsusintokei/whitepaper/ja/r07/html/datashu.html#f00181>  
 (Data collection)

**(2) Advertising**

Looking at the global advertising market, digital advertising expenditure is projected to reach 469.8 billion dollars in 2024 (a 10.7% increase from the previous year), and the proportion of digital advertising expenditure in total advertising expenditure is expected to increase to 60.8% (Figure 2-1-3-11). In terms of Japan’s digital ad-

vertising market, in 2024, Internet advertising expenditure reached 3.6517 trillion yen, while advertising in the four mass media<sup>8</sup> declined to 2.3363 trillion yen. Since 2021, when Internet advertising expenditure first surpassed that of the four mass media, the gap has been widening (Figure 2-1-3-12).

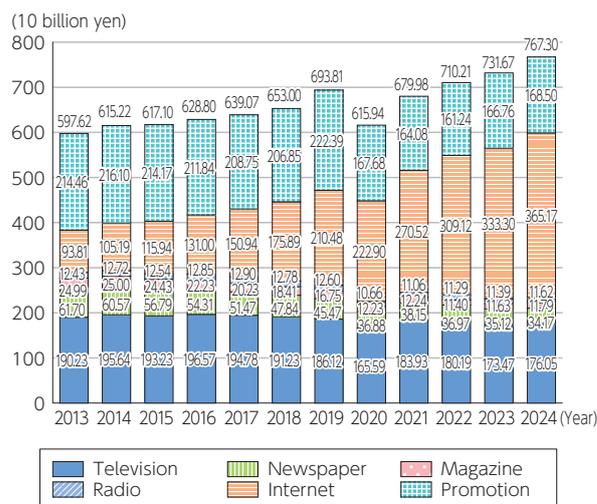
**Figure 2-1-3-11 Changes and forecasts of global advertising expenditures by media type**



(Source) Prepared based on Dentsu Group “Global Advertisement Spend Growth Rate Forecast (2024-2027)” (December 3, 2024)<sup>9</sup>

<sup>8</sup> Television media, newspapers, magazines and radio.

<sup>9</sup> <https://www.group.dentsu.com/jp/news/release/001375.html>

Figure 2-1-3-12 Changes in advertising expenditure by media in Japan<sup>10</sup>

(Source) Prepared based on Dentsu "Knowledge & Data 2024 Advertising expenditure in Japan"<sup>11</sup>



#### Figure (related data) Changes in global total advertising expenditure

Source: Dentsu Group "Global Advertisement Spend Growth Rate Forecast (2024-2027)"

URL: <https://www.soumu.go.jp/johotsusintokei/whitepaper/ja/r07/html/datashu.html#f00184>

(Data collection)

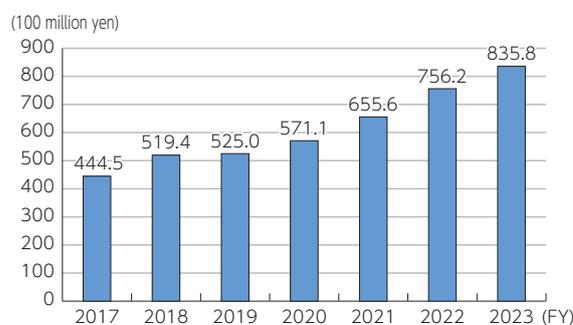
### (3) Trends in overseas exports of Japan's broadcast content

The export value of broadcast content from Japan continued to increase in FY 2023, reaching 83.58 billion yen (a 10.5% increase from the previous year)

(Figure 2-1-3-13).

By entity, the proportion of semi-key private broadcasting stations located in Osaka increased significantly.

Figure 2-1-3-13 Changes in the value of broadcasting content exports from Japan



\*1 Value of broadcasting content exports: Total sales to overseas of program broadcasting rights, Internet distribution rights, video/DVD rights, program format remake rights, and merchandising rights, etc.

\*2 Calculated based on questionnaire responses submitted by NHK, key private broadcasting stations, semi-key private broadcasting stations, local stations, satellite broadcasters, CATV operators, and production companies, etc.

(Source) Prepared based on MIC "Analysis of the Current Status of Overseas Expansion of Broadcasting Content"



#### Figure (related data) Changes in the value of Japan's broadcasting content exports by rights

Source: Prepared based on the MIC "Analysis of the Current Status of Overseas Expansion of Broadcasting Content"

URL: <https://www.soumu.go.jp/johotsusintokei/whitepaper/ja/r07/html/datashu.html#f00186>

(Data collection)



#### Figure (related data) Changes in the value of Japan's broadcasting content exports by entities

Source: Prepared based on the MIC "Analysis of the Current Status of Overseas Expansion of Broadcasting Content"

URL: <https://www.soumu.go.jp/johotsusintokei/whitepaper/ja/r07/html/datashu.html#f00187>

(Data collection)

<sup>10</sup> Since 2019, advertisements on EC platforms for selling goods and the event field are included in the advertisement expenditure in Japan to estimate the advertisement market. Data for 2018 and before is not retroactively adjusted.

<sup>11</sup> [https://www.dentsu.co.jp/knowledge/ad\\_cost/index.html](https://www.dentsu.co.jp/knowledge/ad_cost/index.html)