

# **Result of the Basic Survey on the Information and Communications Industry**

**2016 Basic Survey on the Information and  
Communications Industry  
(Performance in FY2015)**

**March 28, 2017**

**Global ICT Strategy Bureau  
Ministry of Internal Affairs and Communications  
&  
Research and Statistics Department  
Minister's Secretariat  
Ministry of Economy, Trade and Industry**

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Chapter 1 compiles and analyzes survey results on such items as the numbers of companies, establishments, and workers, as well as the financial conditions common to all business types, for the purpose of outlining the information and communications industry as a whole. For a more multidimensional consideration, survey results are compiled both from the viewpoint of overall business activities (Section 1) and from the viewpoint of companies rated as mainly engaged in the information and communications business (Section 2).

In Chapter 2 and onward, survey items for each business type, such as sales by service type, capital investment by business type, outsourcing status, and future business operation plans, are analyzed so as to ascertain the current situation of the respective businesses comprising the information and communications industry.

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## Outline of Survey

### ■ Purpose of survey

The purpose of the Basic Survey on the Information and Communications Industry is to obtain for the purpose of analysis fundamental data related to companies that belong to the Japan Standard Industrial Classification Division G “Information and Communications Businesses.”

### ■ Supporting laws and regulations for survey

Statistics Act (Act No. 53 of 2007)

### ■ Subject of survey

[Area] Nationwide

[Unit] Company

[Attribute]

Companies that belong to the Japan Standard Industrial Classification Division G “Information and Communications Businesses”

[Number of survey subjects]

Total of approx. 11,000 companies (FY2016 survey)

#### (1) Telecommunications

Of the companies engaged in this business, the following are subject to survey:

- Registered telecommunications business operators: All
- Notifying telecommunications business operators: Those with capital or contributions of 30 million yen or more

#### (2) Broadcasting

Of the companies engaged in this business, the following are subject to survey:

- Private broadcasting business operators: All
- Cable television broadcasting business operators: Those with capital or contributions of 30 million yen or more

#### (3) Television program production and radio program production

Companies engaged in this business: All

#### (4) Services incidental to Internet

Of the companies engaged in this business, those with capital or contributions of 30 million yen or more

#### (5) Information services

Of the companies engaged in this business, those with capital or contributions of 30 million yen or more

#### (6) Video picture information, sound information, character information production and distribution (except television program production and radio program production)

Of the companies engaged in this business, those with capital or contributions of 30 million yen or more

- Period of survey  
 [Survey interval] Every year  
 [Survey date] March 31  
 [Implementation date] Period between June 16 and August 15
- Method of survey  
 [Survey route]  
 Ministry of Internal Affairs and Communications - Private business operators - Reporters  
 Ministry of Economy, Trade and Industry - Private business operators - Reporters  
 [Distribution method] Mail-in, online  
 [Collection method] Mail-back, online
- Offices responsible for survey  
 (For Survey Questionnaire (I), Survey Questionnaire (II), Survey Questionnaire (III), and Survey Questionnaire (IV))  
 Economic Research Office, ICT Strategy Policy Division, Global ICT Strategy Bureau,  
 Ministry of Internal Affairs and Communications  
 Tel: 03-5253-5744 (Direct)  
 E-mail: johotsushintokey@ml.soumu.go.jp

(For Survey Questionnaire (I), Survey Questionnaire (IV), Survey Questionnaire (V), and Survey Questionnaire (VI))  
 Enterprise Statistics Office, Research and Statistics Department, Minister's Secretariat,  
 Ministry of Economy, Trade and Industry  
 Tel: 03-3501-1831 (Direct)  
 E-mail: qqcebh@meti.go.jp

## Notes on Use

The Ministry of Internal Affairs and Communications and the Ministry of Economy, Trade and Industry conducted the “2016 Basic Survey on the Information and Communications Industry” as of March 31, 2016, and have compiled and published the results as a report. The outline of the survey and the notes for use of the statistical tables are as follows.

### (Terms)

- “Regular workers” refers to paid directors and regularly employed people (people, regardless of their title as a full-time worker, regular staff member, part-timer, temporary or contract workers, etc., employed for an unspecified period or for a period of one month or longer).
- “Full-time workers/regular staff members” refers to workers treated as full-time workers/regular staff members.
- “Part-timers” refers to regular workers whose scheduled daily working hours or number of working days in a week are shorter than that of full-time workers/regular staff members.
- “Part-timers (working hour conversion)” refers to the number of part-timers calculated in terms of working hours of full-time workers/regular staff members.
- “Workers transferred to other companies” refers to workers who are transferred to parent companies, subsidiaries, affiliate companies, etc. in Japan or overseas, and who are being paid a salary mainly by the company from which they are being transferred (the said company is mainly responsible for paying the workers' salaries).
- “Temporary or daily workers” refers to people who are employed for a period of less than one month, or those who are brought in on a daily basis.
- “Dispatched workers” refers to workers who are employed by a worker-dispatching business operator and are engaged in an accepting company's operations under its supervision and command, based on a contract between the accepting company and the worker-dispatching business operator, under the aforementioned employment relationship. They are not included in the total number of workers of the accepting company.
- “Workers” refers to the combination of “regular workers” and “temporary or daily workers”.
- A “parent company” is a company which owns more than 50% of the voting rights of a certain company (subsidiary). It also includes a company which practically controls the subsidiary even in the case they own only 50% or less of the voting rights.
- A “subsidiary” is a company in which a certain company (parent company) owns more than 50% of the voting rights. It also includes a company in which the subsidiary, or the parent company and the subsidiary combined, own more than 50% of the voting rights (deemed subsidiary) and a company practically controlled by the subsidiary or jointly by the parent company and the subsidiary even in cases where they own only 50% or less of the voting rights.
- An “affiliated company” is a company in which a certain company directly owns no less than 20% but no more than 50% of the voting rights.
- In this report, the “telecommunications business” shows data only for the communications business, and the “telecommunications and broadcasting business” shows the total of the telecommunications business and the broadcasting business.
- “(Reproduced) TV/radio program production work” indicates the total of TV program production work and radio program production work among the overall video picture information, sound information, character information production and distribution work.
- “Companies that responded to the survey for the second consecutive year” refers to companies that provided responses to both the previous survey and this survey.

### (Figures)

- In the tables, “-” means that there is no applicable number and “0” means that the figure is under the unit.
- In the tables, “X” means that the value was kept confidential since the number of companies was two or less. In addition, for areas where it is possible to determine confidential values from the surrounding context even if the number of companies is three or more, such values are kept confidential.
- All figures show the total of valid responses for each item
- As figures and composition ratios round off digits under the units, and there may be cases with no responses in the breakdown, the aggregated amount does not necessarily perfectly match the total.
- The numbers of companies, establishments, workers, and subsidiaries are those at the end of FY2015 and sales are the performance of the entirety of FY2015.
- Breakdown data of the “number of regular workers” (“Full-time workers/regular staff members”, etc.) do not match the total. The difference includes the numbers of paid directors and contract workers, etc.
- XX%-point differences from the previous fiscal year are expressed as “XX points”.

(Other)

- As only valid responses are counted, the number of companies that submitted a response varies by item. Furthermore, as each type of survey form was sent to and collected from different companies, the number of responding companies varies by Chapter even for the same type of business.
- Chapter 1 compiles the survey results regarding all companies engaged in the information and communications business, both from the viewpoint of companies' business activities (Results Based on Business Activities) and from the viewpoint of companies' main business (Results Based on Companies Rated as Mainly Engaged in the IC Business).
- Results based on business activities in Chapter 1, Section 1 are created by focusing on the contents of activities run by companies. In cases where companies are engaged in side businesses, figures (all but sales from the business) for the company as a whole in the respective business types are tabulated. (For example, if a responding company is engaged in the “telecommunications business” and the “software business”, its figures are tabulated respectively in “telecommunications” and “software” in tables and diagrams.)  
Accordingly, the total of each business sector does not match the figure for “Overall”.
- The results based on business activities in Chapter 1, Section 2 are created by rating companies in the business sector where they have the largest sales. Large classifications (“Information and Communications”, “Manufacturing”, “Wholesale and Retail Trade”, etc.) are determined based on the area in which companies' have the largest sales. Within these large classifications, sales are compared based on small classifications, and main businesses (small classifications) (“telecommunications”, “private broadcasting”, etc.) are determined based on the largest sales. (For example, if a responding company is engaged in the “telecommunications business” and the “software business”, when sales are larger from the “telecommunications business”, tabulations are made by rating the company as a “telecommunications company”.)
- It should be noted that since the numbers of valid responses vary for each year that the survey was conducted, care should be exercised when making inter-annual comparisons.
- In Chapter 2, survey results are compiled by business type. Therefore, companies engaged in multiple businesses are included either in the “telecommunications business”, “private broadcasting business” or “cable television broadcasting business”.
- In Chapter 6, data for the video picture information, sound information, and character information production and distribution work are compiled without those for the TV program production work and the radio program production work. Companies for services incidental to video picture information, sound information, character information production and distribution include news syndicate companies.
- The Japan Broadcasting Corporation (NHK) is not covered by this survey, but data for some related parts are cited from materials publicized by NHK (“Inventory, Balance Sheet, Profit and Loss Statement, Statement of Changes in Net Assets, Cash Flow Statement, and Written Explanations Thereof (NHK)”, etc.).
- For companies with capital of 500 million yen or more that had submitted “questionnaires for the annual survey for the Financial Statements Statistics of Corporations by Industry” conducted by the Ministry of Finance, part of the data for this survey's “Assets, Liabilities and Capital” and “Sales and Expenses” in the Survey on Items Common to All Business Types (Survey Questionnaire (I)) are based on said data collected by the Ministry of Finance.
- For companies with capital of 1 billion yen or more that had submitted “questionnaires for the Scientific and Technological Research survey” conducted by the Ministry of Internal Affairs and Communications, part of the data for this survey's “R&D Expenses and R&D Investments” in the Survey on Items Common to All Business Types (Survey Questionnaire (I)) are based on said data collected by the Ministry of Internal Affairs and Communications.
- For companies with 50 or more workers and with capital or contributions of 30 million yen or more that had submitted questionnaires for the “Basic Survey of Japanese Business Structures and Activities” conducted by the Ministry of Economy, Trade and Industry, all data for the Survey on Items Common to All Business Types (Survey Questionnaire (I)) are based on said data collected by the Ministry of Economy, Trade and Industry.
- When reprinting figures listed in this report onto other media, please cite the “Report on the 2016 Basic Survey on the Information and Communications Industry” (Ministry of Internal Affairs and Communications/Ministry of Economy, Trade and Industry).

(Collection)

Questionnaire type		Number of target companies	Companies that submitted a response	Response rate	Companies that gave a valid response
Questionnaire (I) (Common Survey)		8,850	6,115	69.1%	5,474
Survey on Items for Each Business Type	(II) (Telecommunications and Broadcasting)	1,186	836	70.5%	778
	(III) (Broadcast Program Production)	793	444	56.0%	372
	(IV) (Services incidental to Internet)	1,305	716	54.9%	545
	(V) (Information Service)	5,732	3,860	67.3%	3,494
	(VI) (Video Picture Information, Sound Information, Character Information Production and Distribution)	1,549	886	57.2%	697



# Summary of the Results of 2016 Basic Survey on the Information and Communications Industry

## Points

- The number of companies engaged in the information and communications business was 5,474, out of which 4,686 companies were doing so as their main business.
- Total sales of these 5,474 companies from the information and communications business were 48.0504 trillion yen. Total sales of the 4,686 companies mainly engaged in this business were 46.5774 trillion yen.

### Chapter 1, Section 1: Results Based on Business Activities

→ p.7, p.14

The number of companies engaged in the information and communications business (meaning companies that engage in this business, whether as their main business or not) was 5,474 and the total sales from this business were 48.0504 trillion yen (the total sales of these companies were 71.9513 trillion yen) in FY2015. Total sales from this business by companies that responded to the survey for the second consecutive year were 46.3727 trillion yen (up 4.7%). Sales that are associated with information and communications business were the largest for the telecommunications business, followed by software, and then data processing and information services. These three businesses accounted for 77.8% of total industry sales.

The total number of workers was 1,624,851 (down 0.7%) while productivity was 15.027 million yen/person (up 7.9%).

### Chapter 1, Section 2: Results Based on Companies Rated as Mainly Engaged in IC Business

→ p.8, p.25

The number of companies rated as information and communications companies (IC companies) (meaning companies which earn more sales from the IC business than from any other) was 4,686 and their total sales in FY2015 were 50.2474 trillion yen (sales from this business were 46.5774 trillion yen).

Sales per IC company were 10.72 billion yen (up 1.5%). The sales per IC company were the largest for telecommunications companies, followed by newspaper publishers, and then companies engaged in services incidental to the internet.

### Chapter 2: Telecommunications and Broadcasting Business

→ p.9, p.35

The number of companies engaged in the telecommunications and broadcasting business was 990 and the total sales in FY2015 were 17.4918 trillion yen. Sales by companies that responded to the survey for the second consecutive year were 17.3022 trillion yen (up 7.0%). By business type, sales were 14.0342 trillion yen for the telecommunications business, 2.2835 trillion yen for the private broadcasting business, and 486.2 billion yen for the cable television broadcasting business.

### Chapter 3: Broadcast Program Production Business

→ p.10, p.43

The number of companies engaged in the broadcast program production business was 372 and the total sales in FY2015 were 307.0 billion yen. Sales by companies that responded to the survey for the second consecutive year were 222.9 billion yen (down 4.2%). Sales per company were 830 million yen.

### Chapter 4: Business of Services Incidental to Internet

→ p.11, p.51

The number of companies engaged in the services incidental to the internet was 545 and the total sales in FY2015 were 2.3954 trillion yen (up 26.7%), of which sales by companies that responded to the survey for the second consecutive year were 2.1635 trillion yen (up 24.6%).

Sales per company were 4.40 billion yen (up 25.5%), an increase for the third consecutive year.

### Chapter 5: Information Service Business

→ p.12, p.56

The number of companies engaged in the information service business was 3,494. The total sales in FY2015 were 17.2683 trillion yen (up 15.9%), an increase for the sixth consecutive year, of which sales by companies that responded to the survey for the second consecutive year were 14.9669 trillion yen (up 6.8%). By sector, custom software services accounted for the majority.

Sales per company were 4.94 billion yen (up 14.2%), an increase for the sixth consecutive year.

### Chapter 6: Video Picture Information, Sound Information, Character Information Production and Distribution Business

→ p.13, p.65

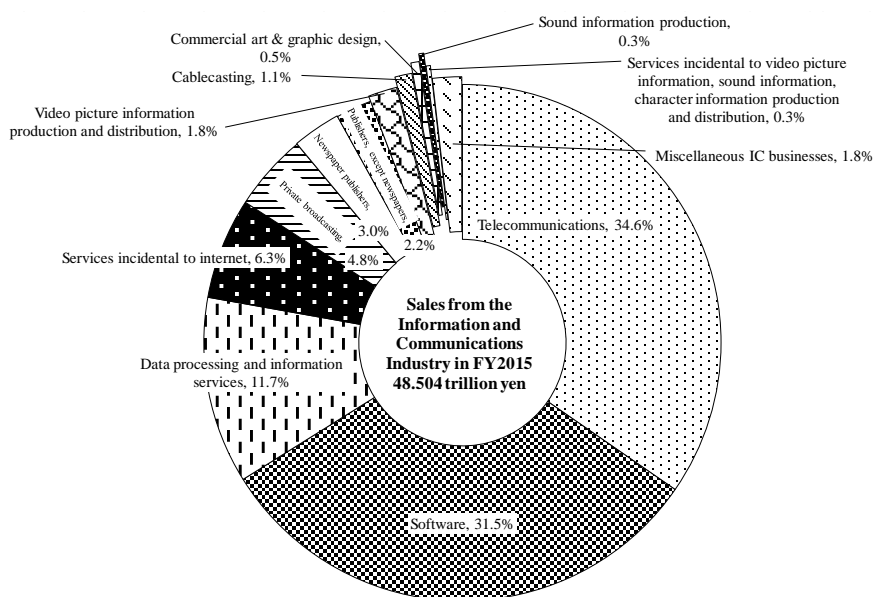
The number of companies engaged in the video picture information, sound information, character information production and distribution business was 697. The total sales in FY2015 were 2.8248 trillion yen (down 3.1%), of which sales by companies that responded to the survey for the second consecutive year were 2.6602 trillion yen (down 2.6%). By sector, newspaper publishers accounted for the majority.

Sales per company were 4.05 billion yen (up 1.4%).

## Highlights of Chapter 1, Section 1: Results Based on Business

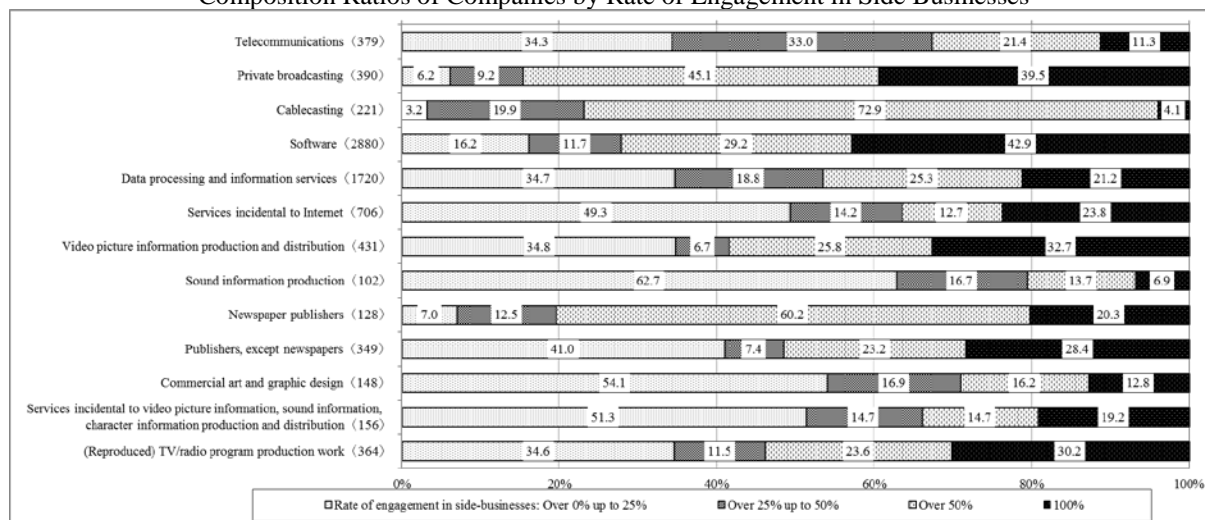
- The number of companies engaged in the information and communications business (meaning companies that engage in this business, whether as their main business or not) was 5,474 and the total sales from this business were 48.0504 trillion yen (the total sales of these companies were 71.9513 trillion yen) in FY2015.
- Sales were the largest for the telecommunications business, followed by the software business, and then the data processing and information services business. These three businesses accounted for 77.8% of the total.
- Looking at the composition ratios of companies in this sector by rate of engagement in side-businesses, in all 12 business types, 50% or more of companies also concurrently operated other businesses. In particular, 95.9% of cablecasting companies, and 93.1% of sound information production companies, were engaged in side-businesses.

### Sales from the Information and Communications Business in FY2015



	Number of companies	Sales from the relevant business Sales (100 million yen)	Composition ratio (%)
Overall	5,474	480,504	100.0
Telecommunications	379	166,376	34.6
Software	2,880	151,356	31.5
Data processing and information services	1,720	56,150	11.7
Services incidental to Internet	706	30,402	6.3
Private broadcasting	390	23,108	4.8
Newspaper publishers	128	14,534	3.0
Publishers, except newspapers	349	10,808	2.2
Video picture information production and distribution	431	8,642	1.8
Cablecasting	221	5,118	1.1
Commercial art and graphic design	148	2,464	0.5
Sound information production	102	1,508	0.3
Services incidental to video picture information, sound information, character information production and distribution	156	1,283	0.3
Miscellaneous IC businesses	-	8,755	1.8

### Composition Ratios of Companies by Rate of Engagement in Side Businesses



(Note) Rate of engagement in side businesses: Sales from the relevant business / Total sales of the company × 100

## Highlights of Chapter 1, Section 2: Results Based on Companies Rated

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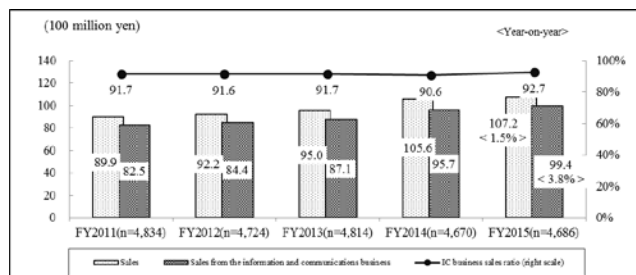
- Looking at companies rated as information and communications companies (IC companies) (meaning companies which earn more sales from the IC business than from any other), per IC company, the number of establishments was 3.9 (up 0.1 establishments), and the number of regular workers was 262 (up 1.9%).
- Sales per IC company were 10.72 billion yen (up 1.5%). Of total sales, those from the information and communications business were 9.94 billion yen (up 3.8%), making up 92.7% of sales (up 2.1 points).
- Operating profit per IC company was 1.09 billion yen (up 14.8%), and ordinary profit per IC company was 1.10 billion yen (up 11.8%). Current net income per IC company was 700 million yen (up 17.9%).

### Outline of IC Companies (Per Company)

		Number of establishments	Number of workers (persons)	Number of regular workers (persons)	Sales		Operating profit (million yen)	Ordinary profit (million yen)
					(million yen)	Sales from the IC business (million yen)		
IC companies	FY2014	3.8	258	257	10,564.9	9,574.9	947.9	983.4
	FY2015	3.9	263	262	10,722.9	9,939.7	1,088.3	1,099.4
	Year-on-year (%)	0.1	1.9	1.9	1.5	3.8	14.8	11.8
Telecommunications	FY2014	11.7	944	940	144,324.2	137,194.4	18,138.2	18,018.0
	FY2015	10.3	796	791	124,648.0	124,091.4	19,108.7	18,265.8
	Year-on-year (%)	- 1.4	- 15.7	- 15.9	- 13.6	- 9.6	5.4	1.4
Private broadcasting	FY2014	3.0	78	77	6,845.4	6,538.1	441.4	468.7
	FY2015	2.8	81	80	7,555.7	7,233.2	607.0	628.6
	Year-on-year (%)	- 0.2	3.8	3.9	10.4	10.6	37.5	34.1
Cablecasting	FY2014	2.7	74	74	3,527.7	3,489.8	485.7	446.1
	FY2015	2.5	71	71	3,599.7	3,578.9	502.0	455.1
	Year-on-year (%)	- 0.2	- 4.1	- 4.1	2.0	2.6	3.4	2.0
Software	FY2014	2.9	283	283	8,014.3	6,809.9	431.4	485.5
	FY2015	3.1	286	285	7,936.6	6,811.2	407.6	468.5
	Year-on-year (%)	0.2	1.1	0.7	- 1.0	0.0	- 5.5	- 3.5
Data processing and information services	FY2014	4.8	328	326	5,941.4	5,310.9	418.2	445.8
	FY2015	4.8	340	335	6,515.9	5,861.0	445.9	478.1
	Year-on-year (%)	0.0	3.7	2.8	9.7	10.4	6.6	7.2
Services incidental to Internet	FY2014	2.7	204	198	7,553.8	7,172.5	1,610.6	1,738.3
	FY2015	2.9	228	227	9,774.5	9,530.5	2,339.1	2,431.8
	Year-on-year (%)	0.2	11.8	14.6	29.4	32.9	45.2	39.9
Video picture information production and distribution	FY2014	2.0	82	81	3,127.3	2,676.0	207.0	239.6
	FY2015	1.9	93	92	3,493.9	3,042.2	245.6	279.4
	Year-on-year (%)	- 0.1	13.4	13.6	11.7	13.7	18.6	16.6
TV program production	FY2014	2.0	75	74	2,006.5	1,879.9	75.2	94.4
	FY2015	1.6	85	85	2,470.4	2,325.5	91.1	111.0
	Year-on-year (%)	- 0.4	13.3	14.9	23.1	23.7	21.1	17.6
Sound information production	FY2014	2.2	76	76	5,373.7	4,779.6	1,203.7	191.4
	FY2015	2.1	82	81	6,668.0	5,736.1	2,136.6	225.1
	Year-on-year (%)	- 0.1	7.9	6.6	24.1	20.0	77.5	17.6
Radio program production	FY2014	1.5	18	17	202.5	185.0	3.9	4.1
	FY2015	1.1	20	19	250.2	230.9	1.1	1.4
	Year-on-year (%)	- 0.4	11.1	11.8	23.6	24.8	- 71.8	- 65.9
Newspaper publishers	FY2014	18.5	367	364	15,322.7	13,707.7	540.3	658.1
	FY2015	19.8	367	365	15,154.2	13,534.4	560.3	684.3
	Year-on-year (%)	1.3	0.0	0.3	- 1.1	- 1.3	3.7	4.0
Publishers, except newspapers	FY2014	3.2	129	129	5,451.7	5,276.9	128.8	235.3
	FY2015	2.9	126	126	5,569.7	5,363.8	196.6	272.3
	Year-on-year (%)	- 0.3	- 2.3	- 2.3	2.2	1.6	52.6	15.7
Commercial art and graphic design	FY2014	2.7	86	84	1,675.2	1,460.5	48.9	57.7
	FY2015	2.4	65	64	1,534.3	1,405.2	50.4	51.3
	Year-on-year (%)	- 0.3	- 24.4	- 23.8	- 8.4	- 3.8	3.1	- 11.1
Services incidental to video picture information, sound information, character information production & distribution	FY2014	3.5	102	100	1,882.1	1,607.2	41.9	56.0
	FY2015	3.6	109	106	1,898.7	1,580.2	31.6	75.5
	Year-on-year (%)	0.1	6.9	6.0	0.9	- 1.7	- 24.6	34.8

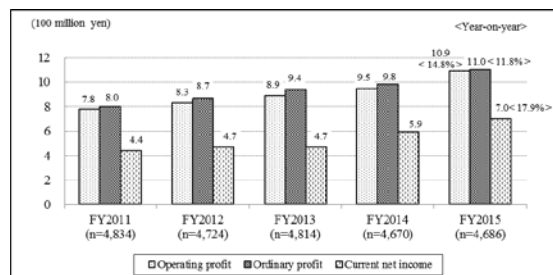
(Note) The year-on-year comparison for the number of establishments per company represents the difference as compared to the previous fiscal year.

### Sales per IC Company



(Note) Year-on-year comparison is calculated in 1 million yen units.

### Profit per IC Company



(Note) Year-on-year comparison is calculated in 1 million yen units.

## Highlights of Chapter 2: Telecommunications and Broadcasting

- Total sales in the telecommunications and broadcasting business were 17.4918 trillion yen in FY2015. Sales by companies that responded to the survey for the second consecutive year were 17.3022 trillion yen (up 7.0%). By business type, sales were 14.0342 trillion yen for the telecommunications business, 2.2835 trillion yen for the private broadcasting business, and 486.2 billion yen for the cable television broadcasting business.
- With regard to companies that intend to start new businesses within one year, telecommunications and cable television broadcasting businesses intending to start “FTTH services” were 24.3% and 40.0% respectively. Private broadcasting businesses intending to start “Web contents delivery service” were the highest, at 33.3%.

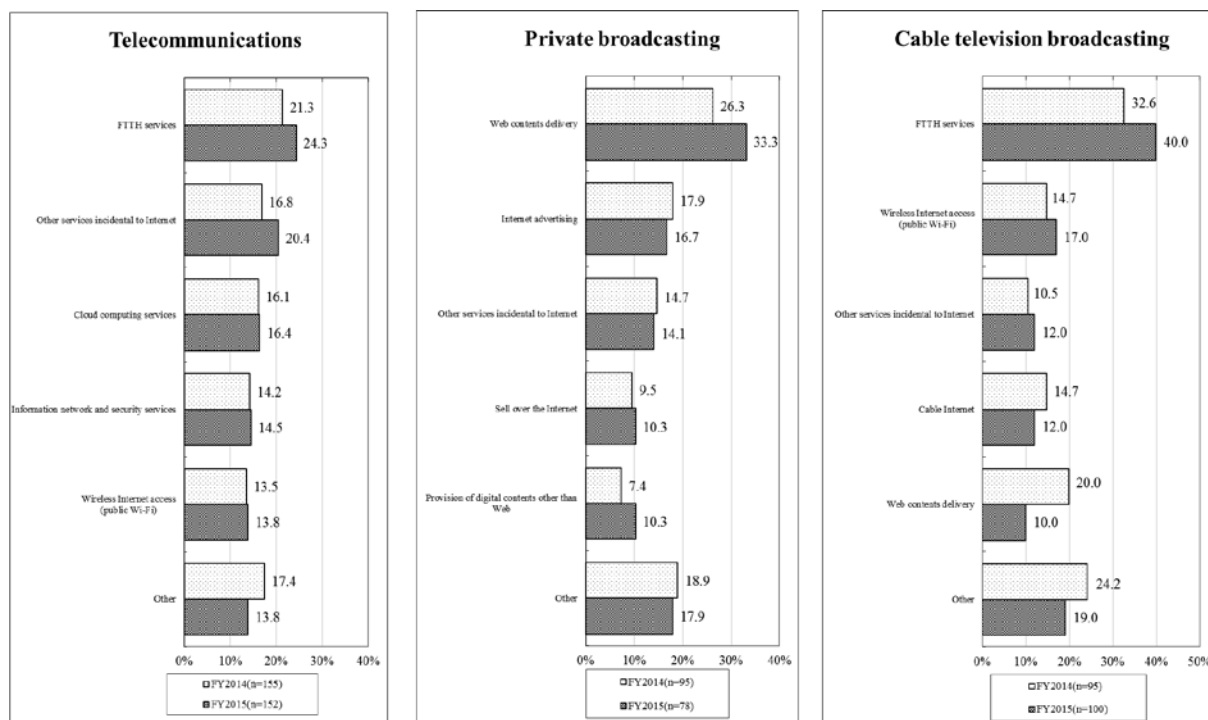
### Sales of Telecommunications and Broadcasting Business by Business Type

(Unit: companies, 100 million yen)

Classification	FY2015		(Special tabulation) Companies that responded to the survey for the second consecutive year				
	Number of companies	Sales	FY2014		FY2015		Year-on-year (%)
			Number of companies	Sales	Number of companies	Sales	
Overall	990	174,918	841	161,770	841	173,022	7.0
Telecommunications	399	140,342	332	128,592	332	139,627	8.6
Broadcasting	591	34,576	509	33,178	509	33,395	0.7
Private broadcasting	370	22,835	330	22,115	330	22,179	0.3
Cable television broadcasting	220	4,862	178	4,315	178	4,337	0.5
NHK	1	6,879	1	6,748	1	6,879	1.9

\*Data for NHK are based on publicized materia

### New Businesses that Companies Intend to Start within One Year (High-ranking) (Multiple answers allowed)

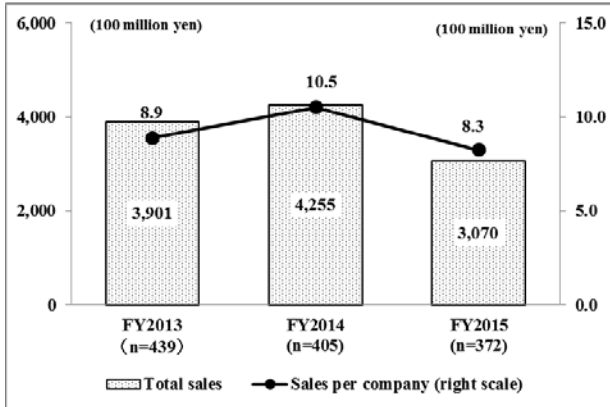


(Note) Values represent the ratio of companies that responded that they were intending to start new businesses within one year.

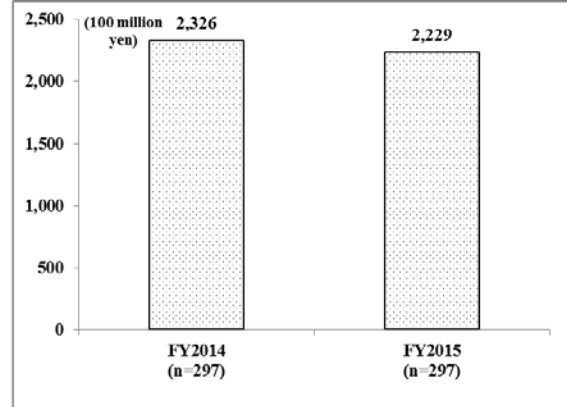
### Highlights of Chapter 3: Broadcast Program Production

- Total sales in FY2015 were 307.0 billion yen, and sales per company were 830 million yen (down 21.4%). Sales by companies that responded to the survey for the second consecutive year were 222.9 billion yen (down 4.2%).
- With regard to broadcast programs for which secondary use is possible based on a company's own intent, the percentage of broadcast program producers that are actually carrying out secondary use declined to 70.5% (down 13.5 points).
- Regarding issues pertaining to management, many business operators answered “Stability of orders” and “Low unit prices of orders” as challenges.

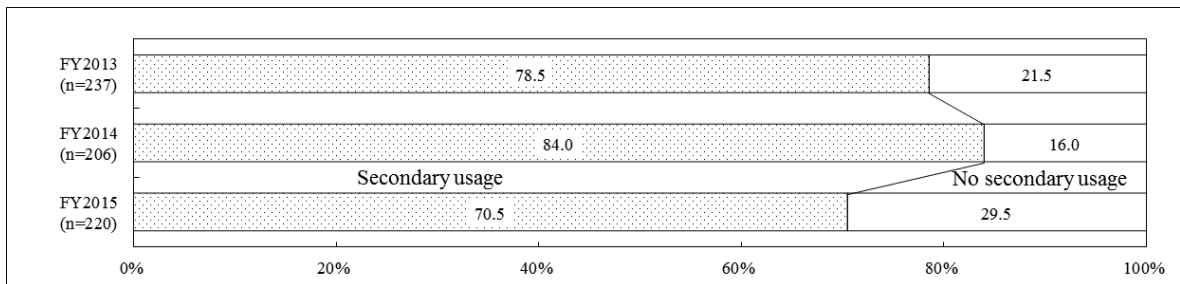
Changes in Sales in the Broadcast Program Production Business



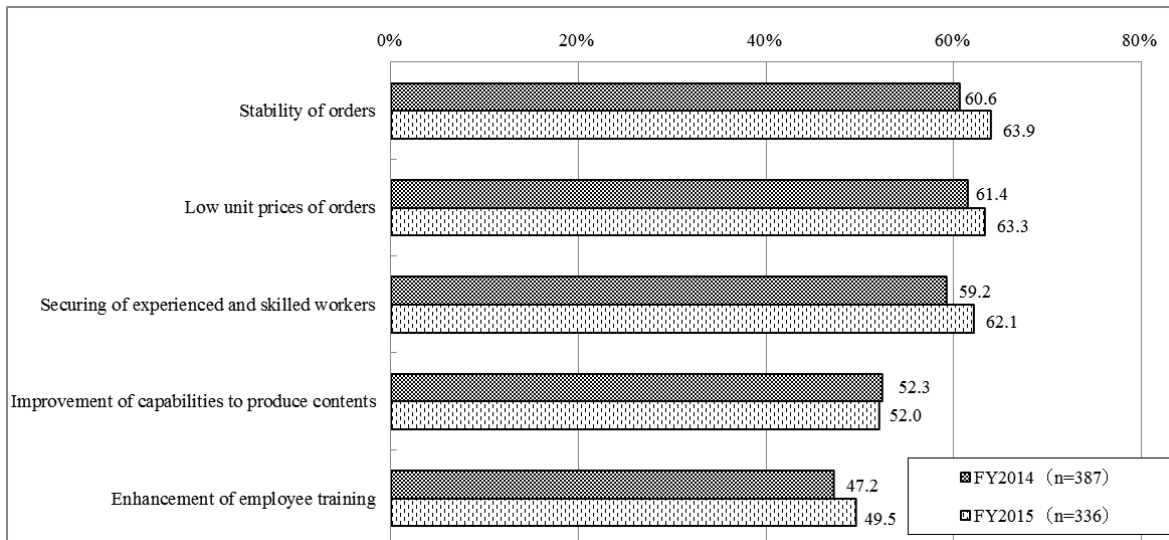
Changes in Sales by Companies that Responded to the Survey for the Second Consecutive Year



Secondary Use of Television Broadcast Programs



Management Challenges in the Broadcast Program Production Business (Multiple answers allowed)



### Highlights of Chapter 4: Services Incidental to Internet

- Total sales in FY2015 were 2.3954 trillion yen (up 26.7%), the largest since the start of the survey.
- Sales per company were 4.40 billion yen (up 25.5%). By service type per company, sales increased most in “Information network security services” and “Web contents delivery services.”
- Regarding new business fields that companies intend to start within one year, “Cloud computing services” and “Web contents delivery services” were often mentioned by many companies (21.1% and 18.6%, respectively).

Number of Companies and Sales by Service Type (Based on Companies' Activities)

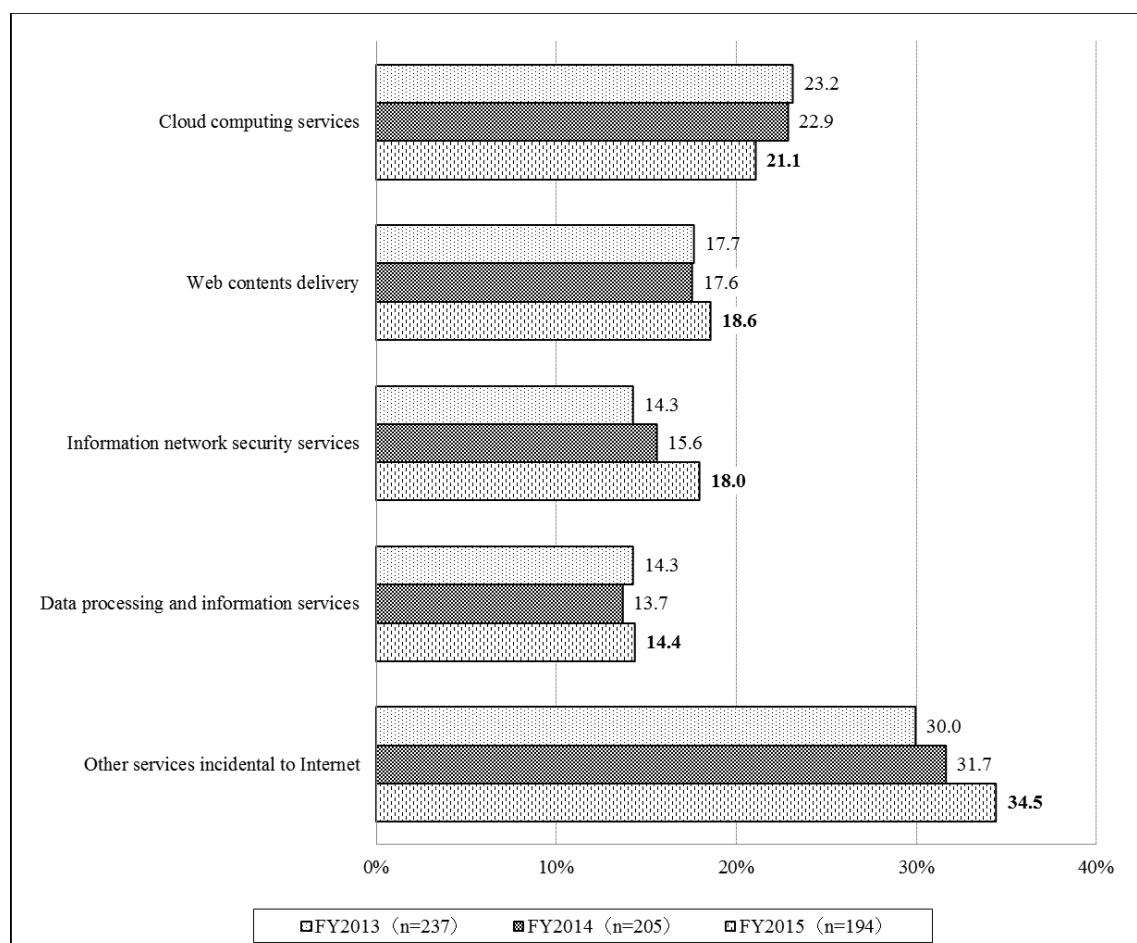
	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2014	FY2015	Year-on-year (%)	FY2014	FY2015	Year-on-year (%)	FY2014	FY2015	Year-on-year (%)
Total	540	545	0.9	1,890,639	2,395,436	26.7	3,501.2	4,395.3	25.5
Web information search services	74	69	-6.8	119,946	121,612	1.4	1,620.9	1,762.5	8.7
Shopping site operation and auction site operation	76	77	1.3	226,029	265,783	17.6	2,974.1	3,451.7	16.1
Electronic bulletin board services, blog services, and SNS operation	19	21	10.5	134,076	28,919	-78.4	7,056.6	1,377.1	-80.5
Web contents delivery services	147	143	-2.7	672,160	804,291	19.7	4,572.5	5,624.4	23.0
Revenue from IPTV services	17	16	-5.9	60,917	63,142	3.7	3,583.4	3,946.4	10.1
Cloud computing services	139	132	-5.0	74,368	77,718	4.5	535.0	588.8	10.1
Electronic authentication services	8	11	37.5	4,667	6,746	44.5	583.4	613.3	5.1
Information network security services	69	72	4.3	73,233	99,394	35.7	1,061.3	1,380.5	30.1
Charging/settlement agent services	23	26	13.0	61,469	80,343	30.7	2,672.6	3,090.1	15.6
Server management consignment	95	86	-9.5	47,384	49,911	5.3	498.8	580.4	16.4
Other services incidental to Internet	141	144	2.1	469,343	847,679	80.6	3,328.7	5,886.7	76.8
(Special tabulation) Companies that responded to the survey for the second consecutive year	446	446	-	1,735,870	2,163,518	24.6	3,892.1	4,850.9	24.6

(Notes) As some companies operate multiple services businesses, the total number of companies does not necessarily match the sum of the breakdown figures.

As some companies do not provide data on the breakdown of sales, the numbers for total sales and the sum of the breakdown do not match.

“Shopping site operation and auction site operation” refer to Internet shopping site operation and Internet auction site operation businesses. Hereinafter the same shall apply.

New Businesses that Companies Intend to Start within One Year (High-ranking) (Multiple answers allowed)



### Highlights of Chapter 5: Information

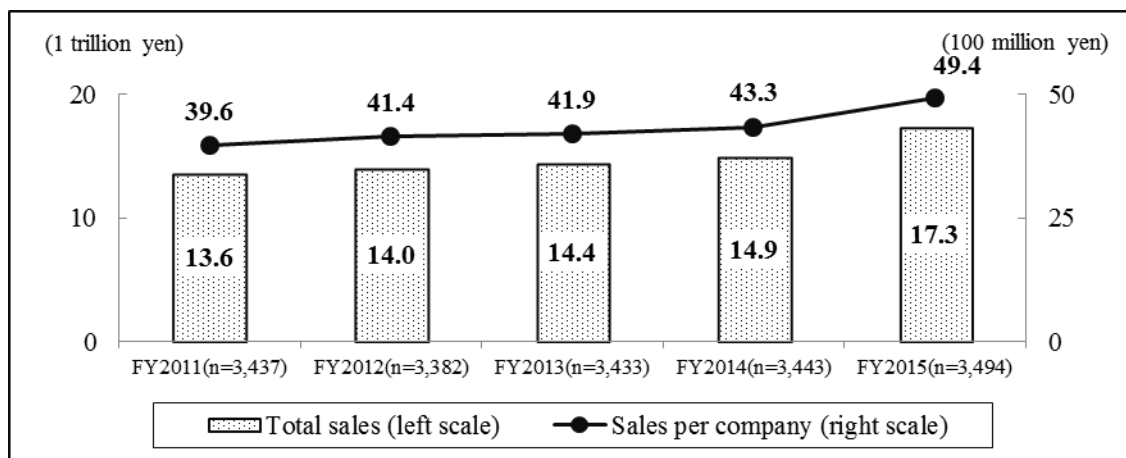
- Total sales in FY2015 were 17.2683 trillion yen (up 15.9%), an increase for the sixth consecutive year and the largest since the start of the survey. All businesses increased sales, including custom software services and data processing services.
- Sales per company were 4.94 billion yen (up 14.2%), with a large increase in sales by package software services and data processing services.
- Looking at the percentage of the number of companies according to primary contractors and subcontractors, primary contractors accounted for 87.8% (up 1.2 points). By capital, the percentage of primary contractors increased, and the percentage of subcontractors decreased.

Number of Companies and Sales by Sector (Based on Companies' Activities)

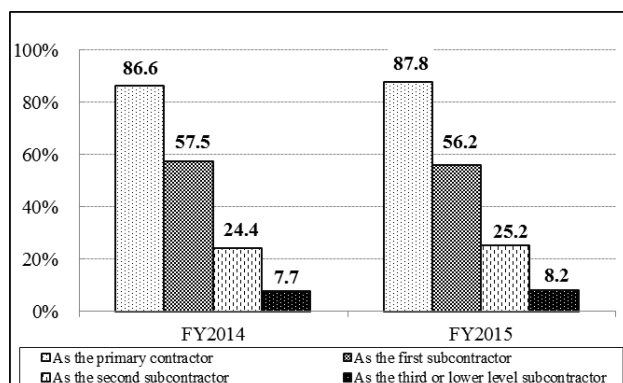
	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2014	FY2015	Year-on-year (%)	FY2014	FY2015	Year-on-year (%)	FY2014	FY2015	Year-on-year (%)
Total	3,443	3,494	1.5	14,899,111	17,268,317	15.9	4,327.4	4,942.3	14.2
Custom software services	2,360	2,364	0.2	6,924,943	8,140,607	17.6	2,934.3	3,443.6	17.4
Embedded software services	247	261	5.7	223,139	246,525	10.5	903.4	944.5	4.5
Package software services	664	690	3.9	758,330	1,135,024	49.7	1,142.1	1,645.0	44.0
Game software services	100	90	-10.0	647,982	691,675	6.7	6,479.8	7,685.3	18.6
Data processing services	1,034	1,031	-0.3	3,128,160	3,720,667	18.9	3,025.3	3,608.8	19.3
Information services, except marketing or opinion research services	184	185	0.5	202,244	232,928	15.2	1,099.2	1,259.1	14.5
Market research, opinion survey and social survey services	87	97	11.5	137,488	174,101	26.6	1,580.3	1,794.9	13.6
Miscellaneous information services	1,096	1,076	-1.8	2,876,825	2,926,790	1.7	2,624.8	2,720.1	3.6
(Special tabulation) Companies that responded to the survey for the second consecutive year	2,974	2,974	-	14,008,922	14,966,899	6.8	4,710.5	5,032.6	6.8

(Note) The number of companies represents the number of companies that are operating relevant businesses even at the very minimum, and thus, the total and the sum of the breakdown do not match.

### Changes in sales

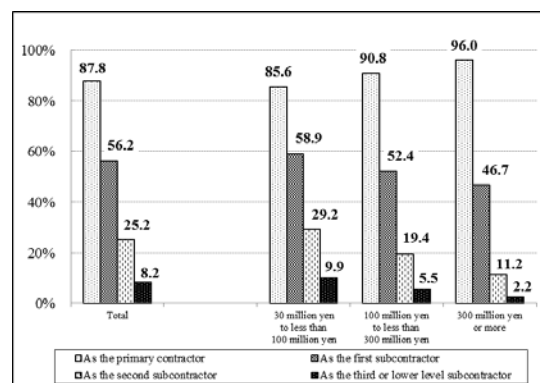


### Percentage of Number of Primary Contractors and Subcontractors



(Note) Multiple answers were allowed for implementation of primary contractors and subcontractors; numbers are counted using the number of companies for which there were valid responses.

### Percentage of Number of Primary Contractors and Subcontractors by Capital



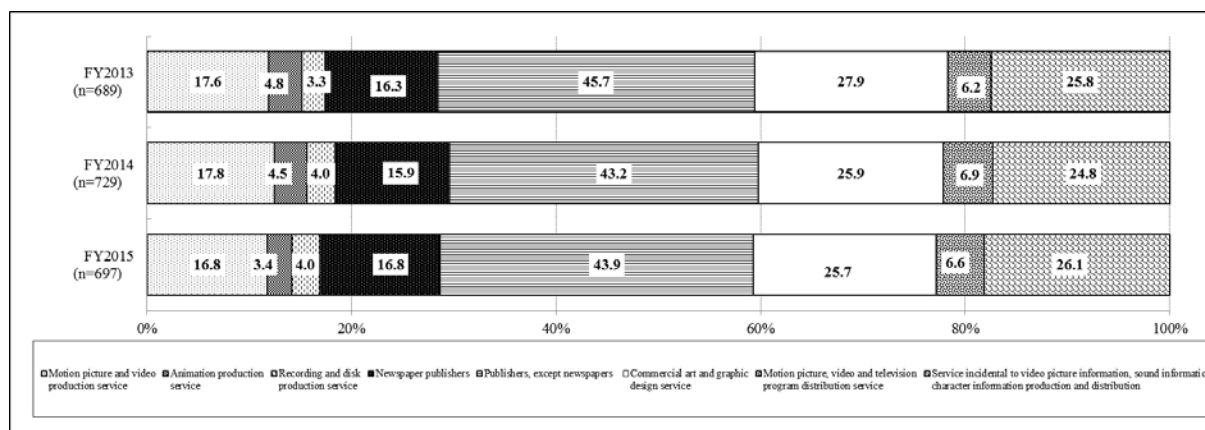
## Highlights of Chapter 6: Video Picture Information, Sound Information, Character Information Production and Distribution

- Total sales in FY2015 were 2.8248 trillion yen (down 3.1%). By sector, sales were the largest for newspaper publishers, followed by publishers except newspapers, and then commercial art and graphic design.
- Sales per company were 4.05 billion yen (up 1.4%), with a decrease in sales by recording and disk production, etc.
- Looking at the composition ratios of the number of companies and sales by sector, publishers, except newspapers, are the largest, accounting for 43.9%, while newspaper publishers are the largest in sales with a share of 36.7%.

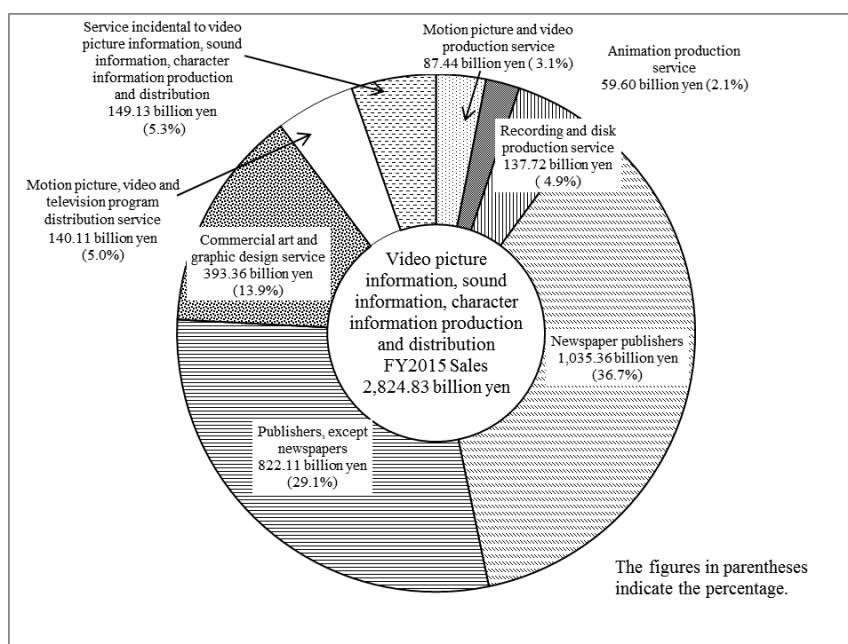
Number of Companies and Sales by Sector (Based on Companies' Activities)

	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2014	FY2015	Year-on-year (%)	FY2014	FY2015	Year-on-year (%)	FY2014	FY2015	Year-on-year (%)
Total	729	697	-4.4	2,914,751	2,824,827	-3.1	3,998.3	4,052.8	1.4
Motion picture and video production service	130	117	-10.0	105,084	87,442	-16.8	808.3	747.4	-7.5
Animation production service	33	24	-27.3	67,476	59,599	-11.7	2,044.7	2,483.3	21.5
Recording and disk production service	29	28	-3.4	160,101	137,718	-14.0	5,520.7	4,918.5	-10.9
Newspaper publishers	116	117	0.9	1,052,389	1,035,361	-1.6	9,072.3	8,849.2	-2.5
Publishers, except newspapers	315	306	-2.9	805,770	822,107	2.0	2,558.0	2,686.6	5.0
Commercial art and graphic design service	189	179	-5.3	437,022	393,356	-10.0	2,312.3	2,197.5	-5.0
Motion picture, video and television program distribution service	50	46	-8.0	135,284	140,113	3.6	2,705.7	3,045.9	12.6
Service incidental to video picture information, sound information, character information production and distribution	181	182	0.6	151,625	149,131	-1.6	837.7	819.4	-2.2
(Special tabulation) Companies that responded to the survey for the second consecutive year	599	599	-	2,730,799	2,660,240	-2.6	4,558.9	4,441.1	-2.6

Composition Ratios of the Number of Companies by Sector (Based on Companies' Activities)



Composition Ratios of Sales by Sector (Based on Companies' Activities)





# Chapter 1 Outline of Companies Engaged in the Information and Communications Business

## Section 1: Results Based on Business Activities

### 1. Overall Outline of Survey Results

- The number of companies engaged in the information and communications business (meaning companies that engage in this business, whether as their main business or not) was 5,474. The total number of establishments was 25,961 and the total number of workers was 1,624,851.
- Total sales from this business were 48.0504 trillion yen (total sales for these companies were 71.9513 trillion yen) in FY2015. Total sales from this business by companies that responded to the survey for the second consecutive year were 46.3727 trillion yen (up 4.7%).
- Operating profit was 5.9992 trillion yen, ordinary profit was 6.1655 trillion yen, and the number of subsidiaries and affiliated companies owned was 9,806.

Fig. 1-1-1 Overall Outline

		Number of companies	Number of establishments	Number of workers (persons)	Number of regular workers (persons)	Sales (100 million yen)	Sales from the relevant business (100 million yen)	Operating profit (100 million yen)	Ordinary profit (100 million yen)	Number of subsidiaries and affiliated companies owned
Overall	FY2014	5,519	26,386	1,636,590	1,626,779	740,824	465,275	54,997	57,321	9,510
	FY2015	5,474	25,961	1,624,851	1,615,513	719,513	480,504	59,992	61,655	9,806
	Year-on-year (%)	-0.8	-1.6	-0.7	-0.7	-2.9	3.3	9.1	7.6	3.1
Telecommunications	FY2014	371	2,526	167,014	166,469	195,123	170,073	23,874	23,820	728
	FY2015	379	2,515	161,142	160,387	190,601	166,376	28,171	27,041	793
	Year-on-year (%)	2.2	-0.4	-3.5	-3.7	-2.3	-2.2	18.0	13.5	8.9
Private broadcasting	FY2014	371	1,513	35,964	35,544	24,547	20,245	1,650	1,805	439
	FY2015	390	1,581	40,298	39,835	28,315	23,108	2,308	2,445	472
	Year-on-year (%)	5.1	4.5	12.1	12.1	15.3	14.1	39.9	35.4	7.5
Cablecasting	FY2014	213	582	20,663	20,522	12,655	5,078	1,669	1,577	112
	FY2015	221	550	19,703	18,953	12,188	5,118	1,573	1,469	112
	Year-on-year (%)	3.8	-5.5	-4.6	-7.6	-3.7	0.8	-5.8	-6.9	0.0
Software	FY2014	2,889	10,611	864,599	861,307	261,446	148,677	13,487	15,341	4,051
	FY2015	2,880	10,987	871,744	868,870	258,955	151,356	12,987	15,303	4,110
	Year-on-year (%)	-0.3	3.5	0.8	0.9	-1.0	1.8	-3.7	-0.3	1.5
Data processing and information services	FY2014	1,738	9,657	640,979	638,438	181,981	52,219	7,568	8,576	2,467
	FY2015	1,720	9,442	645,967	641,569	181,492	56,150	7,384	8,613	2,504
	Year-on-year (%)	-1.0	-2.2	0.8	0.5	-0.3	7.5	-2.4	0.4	1.5
Services incidental to Internet	FY2014	705	4,183	232,782	230,404	155,096	25,980	13,420	13,239	1,815
	FY2015	706	4,258	224,000	223,355	145,436	30,402	13,433	13,658	1,945
	Year-on-year (%)	0.1	1.8	-3.8	-3.1	-6.2	17.0	0.1	3.2	7.2
Video picture information production and distribution	FY2014	466	1,607	58,592	58,092	26,580	8,404	1,689	1,708	572
	FY2015	431	1,259	51,014	50,653	25,058	8,642	1,369	1,545	484
	Year-on-year (%)	-7.5	-21.7	-12.9	-12.8	-5.7	2.8	-19.0	-9.6	-15.4
Sound information production	FY2014	127	329	9,473	8,999	4,220	1,836	592	156	58
	FY2015	102	286	8,801	8,325	3,727	1,508	696	153	228
	Year-on-year (%)	-19.7	-13.1	-7.1	-7.5	-11.7	-17.9	17.4	-2.0	293.1
Newspaper publishers	FY2014	132	2,209	43,855	43,559	17,913	14,769	639	787	756
	FY2015	128	2,322	43,206	42,980	17,472	14,534	646	808	651
	Year-on-year (%)	-3.0	5.1	-1.5	-1.3	-2.5	-1.6	1.1	2.6	-13.9
Publishers, except newspapers	FY2014	368	3,109	85,353	83,901	35,356	10,938	1,518	1,912	858
	FY2015	349	3,294	85,649	84,691	35,288	10,808	1,651	1,954	782
	Year-on-year (%)	-5.2	6.0	0.3	0.9	-0.2	-1.2	8.8	2.2	-8.9
Commercial art and graphic design	FY2014	181	631	28,071	27,886	20,814	3,128	767	1,026	924
	FY2015	148	565	24,960	24,857	16,420	2,464	647	905	960
	Year-on-year (%)	-18.2	-10.5	-11.1	-10.9	-21.1	-21.2	-15.6	-11.8	3.9
Services incidental to video picture information, sound information, character information production and distribution	FY2014	167	591	22,264	22,010	6,923	1,331	357	403	187
	FY2015	156	574	19,624	19,331	5,681	1,283	259	319	182
	Year-on-year (%)	-6.6	-2.9	-11.9	-12.2	-17.9	-3.6	-27.3	-20.9	-2.7
(Reproduced) TV/radio program production work	FY2014	393	854	29,333	28,852	12,189	3,924	706	752	269
	FY2015	364	664	30,574	30,196	12,866	4,323	675	751	290
	Year-on-year (%)	-7.4	-22.2	4.2	4.7	5.6	10.2	-4.4	0.0	7.8

\* "Sales from the relevant business" refer to sales from activities of the relevant business (example: for the telecommunications business, sales from activities related to the telecommunications business).

\* The total of "Sales from the relevant business" does not match the sum of each business type, as some companies provided data in the category of "other."

Fig. 1-1-2 Outline of Companies that Responded to the Survey for the Second Consecutive Year

		Number of companies	Number of establishments	Number of workers (persons)	Number of regular workers (persons)	Sales (100 million yen)	Sales from the relevant business (100 million yen)	Operating profit (100 million yen)	Ordinary profit (100 million yen)	Number of subsidiaries and affiliated companies owned
Overall	FY2014	4,791	23,595	1,515,564	1,506,494	703,467	442,801	52,358	54,653	8,819
	FY2015	4,791	23,872	1,551,058	1,542,130	699,750	463,727	58,510	60,088	9,271
	Year-on-year (%)	-	1.2	2.3	2.4	-0.5	4.7	11.8	9.9	5.1

## 2. Sales

- Total sales from the information and communications business were 48.0504 trillion yen in FY2015.
- Sales related to the relevant business were the largest for the telecommunications business, followed by software, and then data processing and information services. These three businesses accounted for 77.8% of the total.
- Looking at the composition ratios, telecommunications accounted for 34.6% (down 1.9 points) and software services accounted for 31.5% (down 0.5 points).

Fig. 1-1-3 Sales of the Information and Communications Business

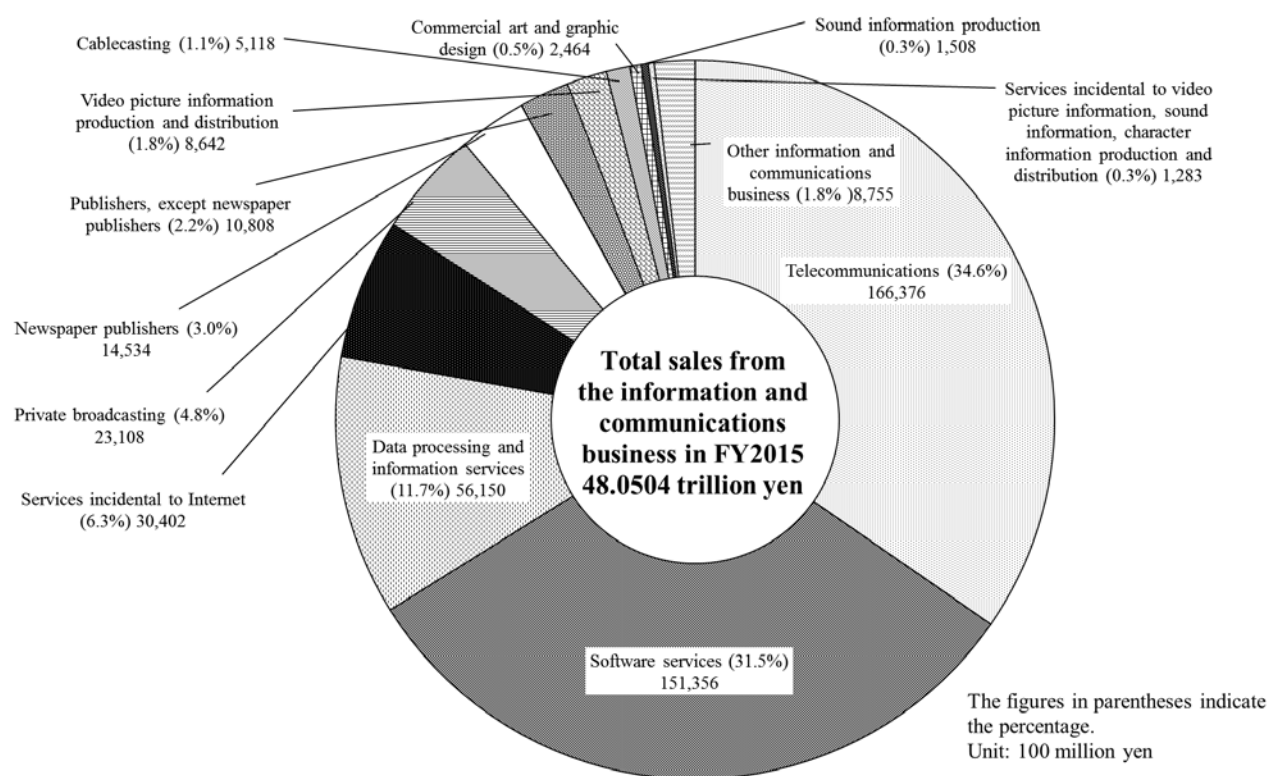


Fig. 1-1-4 Sales of the Information and Communications Business

		Overall	Telecommunications	Software	Data processing and information services	Services incidental to Internet	Private broadcasting	Newspaper publishers	Publishers, except newspapers	Video picture information production and distribution	Cablecasting	Commercial art and graphic design	Sound information production	Services incidental to video picture information	Miscellaneous IC businesses
FY2014	Number of companies	5,519	371	2,889	1,738	705	371	132	368	466	213	181	127	167	-
	Sales from the relevant business	465,275	170,073	148,677	52,219	25,980	20,245	14,769	10,938	8,404	5,078	3,128	1,836	1,331	2,598
	Composition ratio (%)	100.0	36.6	32.0	11.2	5.6	4.4	3.2	2.4	1.8	1.1	0.7	0.4	0.3	0.6
FY2015	Number of companies	5,474	379	2,880	1,720	706	390	128	349	431	221	148	102	156	-
	Sales from the relevant business	480,504	166,376	151,356	56,150	30,402	23,108	14,534	10,808	8,642	5,118	2,464	1,508	1,283	8,755
	Composition ratio (%)	100.0	34.6	31.5	11.7	6.3	4.8	3.0	2.2	1.8	1.1	0.5	0.3	0.3	1.8
Change from the previous year's composition ratio (points)		-	-1.9	-0.5	0.5	0.7	0.5	-0.1	-0.1	0.0	0.0	-0.2	-0.1	0.0	1.3

\* "Sales from the relevant business" refer to sales from activities of the relevant business. (ex. For the telecommunications business, sales from activities related to the telecommunications business.)  
 \* "Miscellaneous IC businesses" refer to businesses which provided data in the category of "Other" for the main items in the breakdown of sales from the information and communication business.

### 3. Composition ratios (by capital, sales, number of workers, and engagement in side businesses)

Composition ratios of companies that have information and communication business:

- By capital, in eight out of 12 business types, companies with “Less than 100 million yen” accounted for 50% or more of the total. In particular, in both video picture information production and distribution and sound information production, companies with “Less than 50 million yen” accounted for 40% or more of the total.
- By capital, composition ratio was generally highest for companies with “1 billion yen or more but less than 5 billion yen”. However, in private broadcasting and sound information production, companies with “Less than 100 million yen” accounted for over 30%.
- By the number of workers, in all business types except for the newspaper publishers, 50% or more of the companies were those with “Less than 100 workers”. In particular, over 80% of cablecasting companies were with “Less than 100 workers”.
- Looking at the composition ratios by rate of engagement in side-businesses, in all 12 business types, 50% or more of companies also concurrently operated other businesses. In particular, 95.9% of cablecasting companies and 93.1% of sound information production companies were engaged in side-businesses.

Fig. 1-1-5 Composition Ratios of Companies by Capital

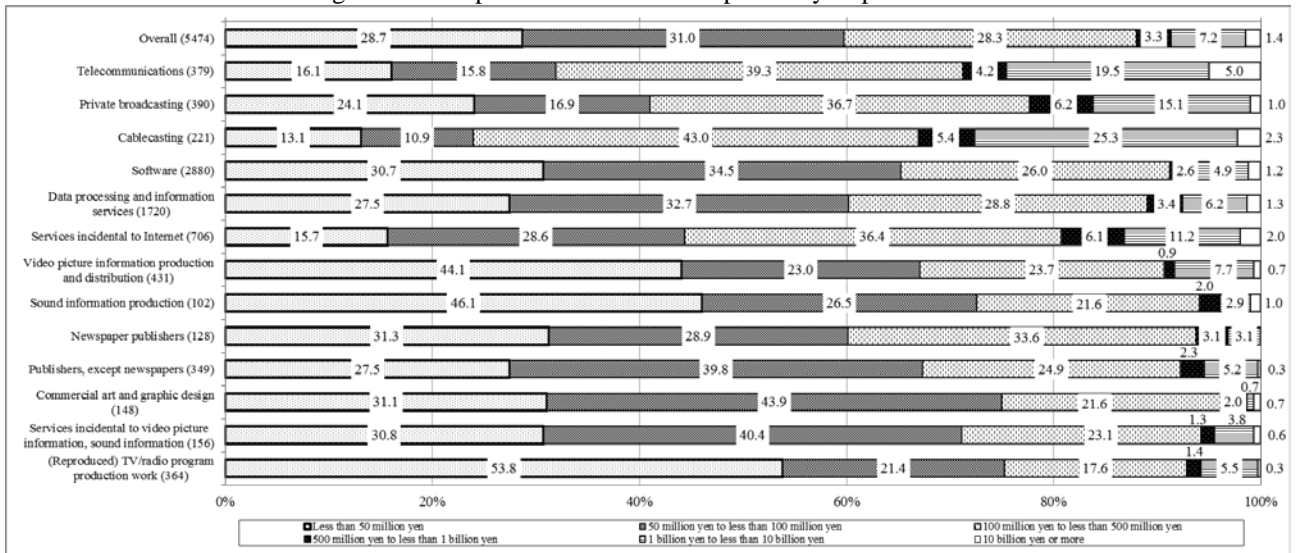


Fig. 1-1-6 Composition Ratios of Companies by Sales

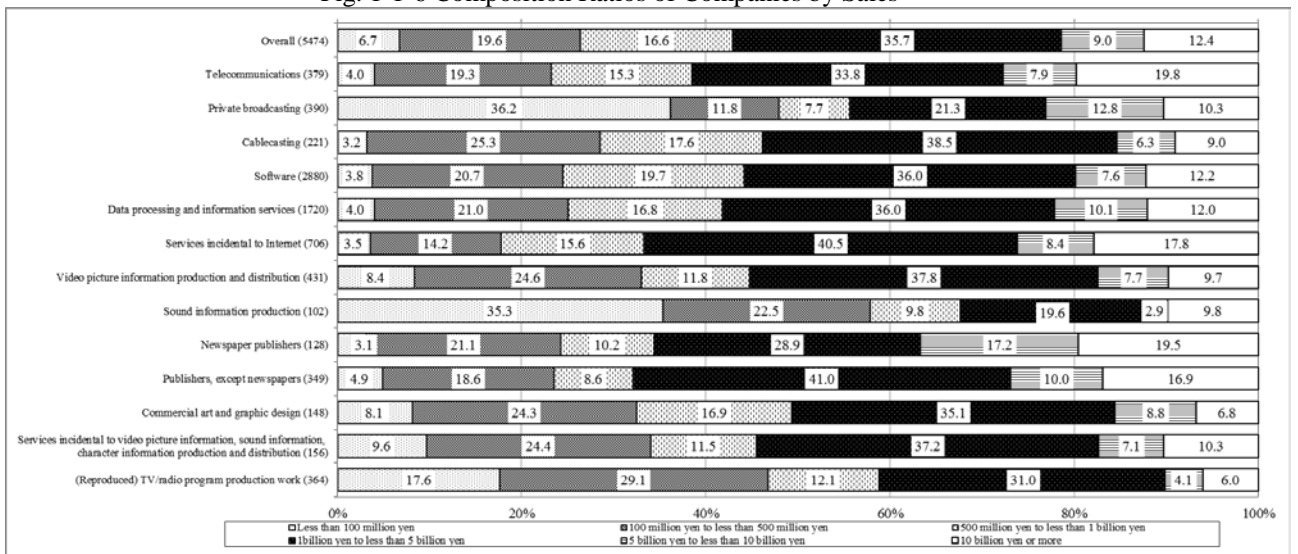


Fig. 1-1-7 Composition Ratios of Companies by Number of Workers

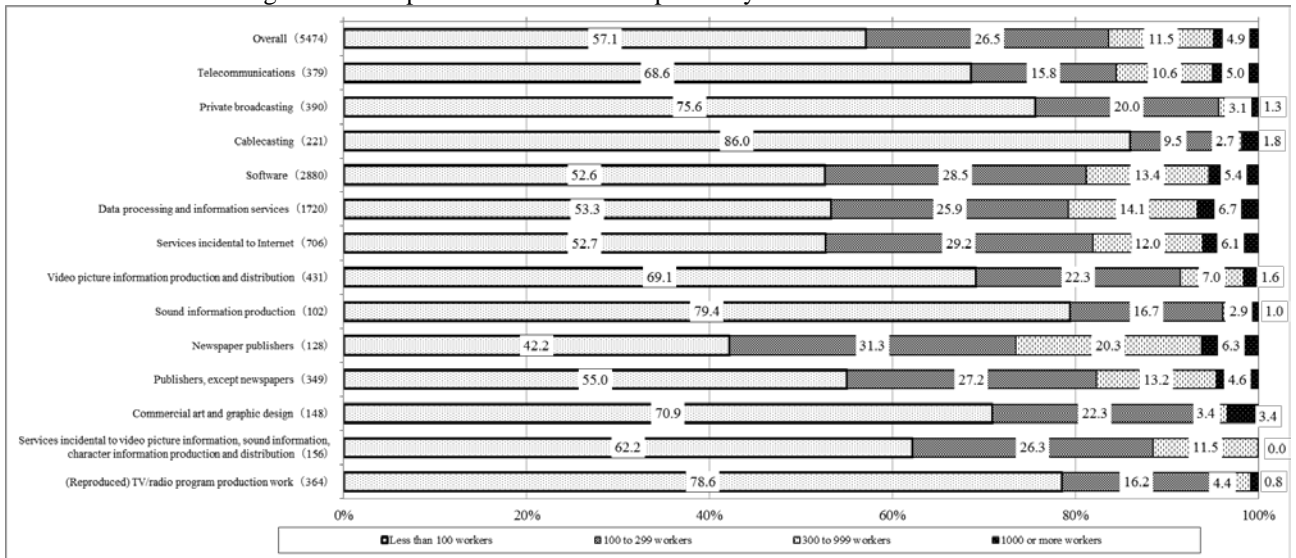
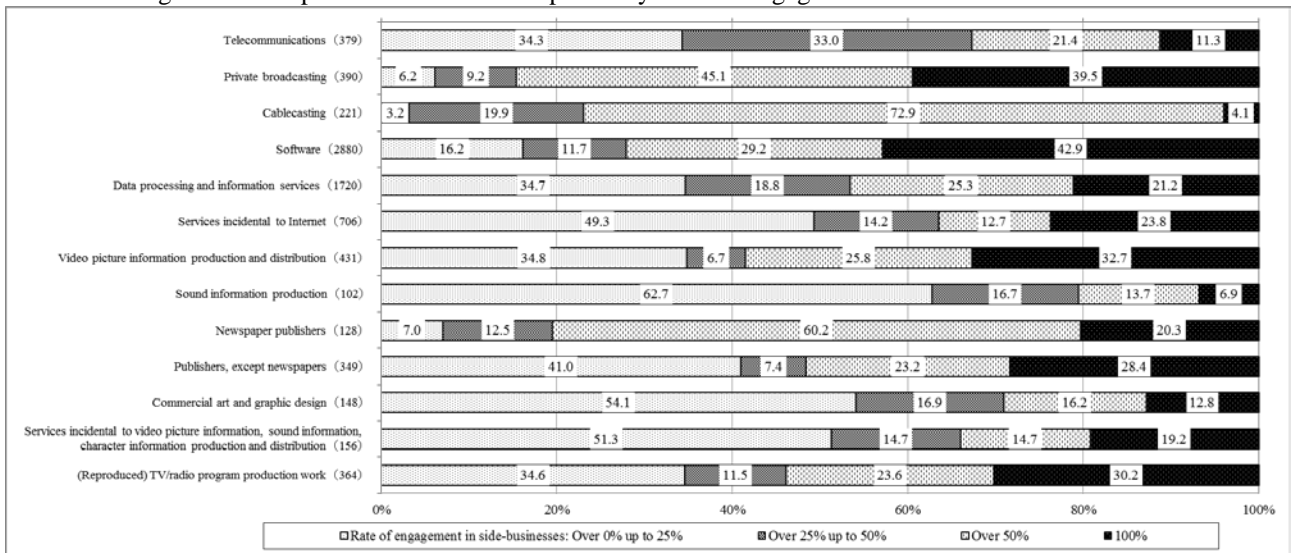


Fig. 1-1-8 Composition Ratios of Companies by Rate of Engagement in Side-Businesses



(Note) Rate of engagement in side businesses: Sales from the relevant business / Total sales of the company × 100

#### 4. Profits

- The operating profit per IC company was 1.10 billion yen (up 10.0%), the ordinary profit per IC company was 1.13 billion yen (up 8.4%), and the value added per IC company was 4.46 billion yen (up 8.0%).
- For IC companies that responded to the survey for the second consecutive year, the operating profit per IC company was 1.22 billion yen (up 11.8%), the ordinary profit per IC company was 1.25 billion yen (up 9.9%), and the value added per IC company was 4.97 billion yen (up 9.8%) in FY2015.

Fig. 1-1-9 Profits

		(Unit: 100 million yen)										
		Number of companies	Sales	Operating profit	Ordinary profit	Current net profit	Value added	Per company				
								Sales	Operating profit	Ordinary profit	Current net profit	Value added
Overall	FY2014	5,519	740,824	54,997	57,321	38,150	227,991	134.2	10.0	10.4	6.9	41.3
	FY2015	5,474	719,513	59,992	61,655	38,884	244,170	131.4	11.0	11.3	7.1	44.6
	Year-on-year	-0.8%	-2.9%	9.1%	7.6%	1.9%	7.1%	-2.1%	10.0%	8.4%	2.8%	8.0%
Telecommunications	FY2014	371	195,123	23,874	23,820	14,803	68,316	525.9	64.3	64.2	39.9	184.1
	FY2015	379	190,601	28,171	27,041	18,210	84,743	502.9	74.3	71.3	48.0	223.6
	Year-on-year	2.2%	-2.3%	18.0%	13.5%	23.0%	24.0%	-4.4%	15.5%	11.1%	20.4%	21.4%
Private broadcasting	FY2014	371	24,547	1,650	1,805	1,191	6,503	66.2	4.4	4.9	3.2	17.5
	FY2015	390	28,315	2,308	2,445	1,524	7,962	72.6	5.9	6.3	3.9	20.4
	Year-on-year	5.1%	15.3%	39.9%	35.4%	28.0%	22.4%	9.7%	33.1%	28.8%	21.7%	16.5%
Cablecasting	FY2014	213	12,655	1,669	1,577	1,002	5,687	59.4	7.8	7.4	4.7	26.7
	FY2015	221	12,188	1,573	1,469	993	5,300	55.1	7.1	6.6	4.5	24.0
	Year-on-year	3.8%	-3.7%	-5.8%	-6.9%	-0.9%	-6.8%	-7.2%	-9.2%	-10.3%	-4.5%	-10.2%
Software	FY2014	2,889	261,446	13,487	15,341	9,878	88,421	90.5	4.7	5.3	3.4	30.6
	FY2015	2,880	258,955	12,987	15,303	10,227	86,756	89.9	4.5	5.3	3.6	30.1
	Year-on-year	-0.3%	-1.0%	-3.7%	-0.3%	3.5%	-1.9%	-0.6%	-3.4%	0.1%	3.9%	-1.6%
Data processing and information services	FY2014	1,738	181,981	7,568	8,576	5,266	51,540	104.7	4.4	4.9	3.0	29.7
	FY2015	1,720	181,492	7,384	8,613	5,459	52,941	105.5	4.3	5.0	3.2	30.8
	Year-on-year	-1.0%	-0.3%	-2.4%	0.4%	3.7%	2.7%	0.8%	-1.4%	1.5%	4.7%	3.8%
Services incidental to Internet	FY2014	705	155,096	13,420	13,239	10,678	46,083	220.0	19.0	18.8	15.1	65.4
	FY2015	706	145,436	13,433	13,658	7,013	45,514	206.0	19.0	19.3	9.9	64.5
	Year-on-year	0.1%	-6.2%	0.1%	3.2%	-34.3%	-1.2%	-6.4%	0.0%	3.0%	-34.4%	-1.4%
Video picture information production and distribution	FY2014	466	26,580	1,689	1,708	1,082	6,744	57.0	3.6	3.7	2.3	14.5
	FY2015	431	25,058	1,369	1,545	955	6,353	58.1	3.2	3.6	2.2	14.7
	Year-on-year	-7.5%	-5.7%	-19.0%	-9.6%	-11.8%	-5.8%	1.9%	-12.4%	-2.2%	-4.6%	1.9%
Sound information production	FY2014	127	4,220	592	156	73	1,151	33.2	4.7	1.2	0.6	9.1
	FY2015	102	3,727	696	153	96	1,269	36.5	6.8	1.5	0.9	12.4
	Year-on-year	-19.7%	-11.7%	17.4%	-2.0%	31.6%	10.3%	10.0%	46.2%	22.0%	63.9%	37.3%
Newspaper publishers	FY2014	132	17,913	639	787	378	6,141	135.7	4.8	6.0	2.9	46.5
	FY2015	128	17,472	646	808	478	6,085	136.5	5.0	6.3	3.7	47.5
	Year-on-year	-3.0%	-2.5%	1.1%	2.6%	26.3%	-0.9%	0.6%	4.3%	5.8%	30.3%	2.2%
Publishers, except newspapers	FY2014	368	35,356	1,518	1,912	805	10,137	96.1	4.1	5.2	2.2	27.5
	FY2015	349	35,288	1,651	1,954	1,018	10,297	101.1	4.7	5.6	2.9	29.5
	Year-on-year	-5.2%	-0.2%	8.8%	2.2%	26.4%	1.6%	5.2%	14.7%	7.8%	33.3%	7.1%
Commercial art and graphic design	FY2014	181	20,814	767	1,026	804	3,261	115.0	4.2	5.7	4.4	18.0
	FY2015	148	16,420	647	905	696	2,676	110.9	4.4	6.1	4.7	18.1
	Year-on-year	-18.2%	-21.1%	-15.6%	-11.8%	-13.5%	-17.9%	-3.5%	3.3%	7.9%	5.8%	0.4%
Services incidental to video picture information, sound information, character information production and distribution	FY2014	167	6,923	357	403	259	2,253	41.5	2.1	2.4	1.6	13.5
	FY2015	156	5,681	259	319	204	1,879	36.4	1.7	2.0	1.3	12.0
	Year-on-year	-6.6%	-17.9%	-27.3%	-20.9%	-21.5%	-16.6%	-12.2%	-22.2%	-15.3%	-15.9%	-10.7%
(Reproduced) TV/radio program production work	FY2014	393	12,189	706	752	476	3,232	31.0	1.8	1.9	1.2	8.2
	FY2015	364	12,866	675	751	487	3,507	35.3	1.9	2.1	1.3	9.6
	Year-on-year	-7.4%	5.6%	-4.4%	0.0%	2.2%	8.5%	14.0%	3.2%	7.9%	10.3%	17.1%

(Notes) Value added = Operating profit + Depreciation expenses + Total payroll + Welfare expenses + Rental expenses of movables and immovables + Taxes and public imposition

Fig. 1-1-10 Operating Profits on Sales, etc.

	Operating margin (%)			Ratio of ordinary profit to sales (%)			Current income margin (%)			Ratio of value added (%)		
	FY2014	FY2015	Y/Y change (pt)	FY2014	FY2015	Y/Y change (pt)	FY2014	FY2015	Y/Y change (pt)	FY2014	FY2015	Y/Y change (pt)
Overall	7.4	8.3	0.9pt	7.7	8.6	0.8pt	5.1	5.4	0.3pt	30.8	33.9	3.2pt
Telecommunications	12.2	14.8	2.5pt	12.2	14.2	2.0pt	7.6	9.6	2.0pt	35.0	44.5	9.4pt
Private broadcasting	6.7	8.2	1.4pt	7.4	8.6	1.3pt	4.9	5.4	0.5pt	26.5	28.1	1.6pt
Cablecasting	13.2	12.9	-0.3pt	12.5	12.0	-0.4pt	7.9	8.1	0.2pt	44.9	43.5	-1.4pt
Software	5.2	5.0	-0.1pt	5.9	5.9	0.0pt	3.8	3.9	0.2pt	33.8	33.5	-0.3pt
Data processing and information services	4.2	4.1	-0.1pt	4.7	4.7	0.0pt	2.9	3.0	0.1pt	28.3	29.2	0.8pt
Services incidental to Internet	8.7	9.2	0.6pt	8.5	9.4	0.9pt	6.9	4.8	-2.1pt	29.7	31.3	1.6pt
Video picture information production and distribution	6.4	5.5	-0.9pt	6.4	6.2	-0.3pt	4.1	3.8	-0.3pt	25.4	25.4	-0.0pt
Sound information production	14.0	18.7	4.6pt	3.7	4.1	0.4pt	1.7	2.6	0.8pt	27.3	34.1	6.8pt
Newspaper publishers	3.6	3.7	0.1pt	4.4	4.6	0.2pt	2.1	2.7	0.6pt	34.3	34.8	0.5pt
Publishers, except newspapers	4.3	4.7	0.4pt	5.4	5.5	0.1pt	2.3	2.9	0.6pt	28.7	29.2	0.5pt
Commercial art and graphic design	3.7	3.9	0.3pt	4.9	5.5	0.6pt	3.9	4.2	0.4pt	15.7	16.3	0.6pt
Services incidental to video picture information, sound information, character information production and distribution	5.2	4.6	-0.6pt	5.8	5.6	-0.2pt	3.7	3.6	-0.2pt	32.5	33.1	0.5pt
(Reproduced) TV/radio program production work	5.8	5.2	-0.5pt	6.2	5.8	-0.3pt	3.9	3.8	-0.1pt	26.5	27.3	0.7pt

(Notes) Operating margin = Operating profit / Sales × 100 (Profitability index to ascertain how much profit was obtained from operation activities related to the main business from among total sales)

Ordinary profit on sales = Ordinary profit / Sales × 100 (Profitability index to ascertain how much profit was obtained from ordinary activities (operations and financial transactions) from among sales)

Current income margin = Current net income / Sales × 100 (Profitability index to ascertain how much profit was ultimately obtained by the company)

Value added ratio = Value added / Sales × 100

Fig. 1-1-11 Profits, etc. of Companies that Responded to the Survey for the Second Consecutive Year

(Unit: 100 million yen)

		Number of companies	Sales	Operating profit	Ordinary profit	Current net profit	Value added	Per company				
								Sales	Operating profit	Ordinary profit	Current net profit	Value added
Overall	FY2014	4,791	703,467	52,358	54,653	36,640	216,684	146.8	10.9	11.4	7.6	45.2
	FY2015	4,791	699,750	58,510	60,088	37,917	237,910	146.1	12.2	12.5	7.9	49.7
	Year-on-year	-	-0.5%	11.8%	9.9%	3.5%	9.8%	-0.5%	11.8%	9.9%	3.5%	9.8%

Overall	Operating margin (%)			Ratio of ordinary profit to sales (%)			Current income margin (%)			Ratio of value added (%)		
	FY2014	FY2015	Y/Y change (pt)	FY2014	FY2015	Y/Y change (pt)	FY2014	FY2015	Y/Y change (pt)	FY2014	FY2015	Y/Y change (pt)
Overall	7.4	8.4	0.9pt	7.8	8.6	0.8pt	5.2	5.4	0.2pt	30.8	34.0	3.2pt

## 5. Productivity

- The labor productivity of companies engaged in the information and communication business was 15.027 million yen/person (up 7.9%), the labor equipment ratio was 17.746 million yen/person (down 1.5%), and the labor share was 37.1% (down 3.1 points).
- The labor productivity of companies that responded to the survey for the second consecutive year was 15.339 million yen/person (up 7.3%), the labor equipment ratio was 18.365 million yen/person (down 2.6%), and the labor share was 36.6% (down 3.2 points).

Fig. 1-1-12 Labor Productivity, Labor Equipment Ratio, and Labor Share

	Number of companies			Labor productivity (10,000 yen/person)			Labor equipment ratio (10,000 yen/person)			Labor share (%)		
	FY2014	FY2015	Year-on-year	FY2014	FY2015	Year-on-year	FY2014	FY2015	Year-on-year	FY2014	FY2015	Year-on-year
Overall	5,519	5,474	-0.8%	1,393.1	1,502.7	7.9%	1,801.2	1,774.6	-1.5%	40.1	37.1	-306.9%
Telecommunications	371	379	2.2%	4,090.4	5,258.9	28.6%	8,105.9	8,220.0	1.4%	14.8	11.7	-308.2%
Private broadcasting	371	390	5.1%	1,808.1	1,975.8	9.3%	2,804.0	2,874.2	2.5%	41.7	37.5	-417.9%
Cablecasting	213	221	3.8%	2,752.0	2,689.9	-2.3%	5,605.8	5,437.1	-3.0%	19.5	19.9	41.3%
Software	2,889	2,880	-0.3%	1,022.7	995.2	-2.7%	375.2	348.7	-7.1%	58.6	59.2	65.1%
Data processing and information services	1,738	1,720	-1.0%	804.1	819.6	1.9%	332.2	325.1	-2.1%	58.2	57.8	-40.1%
Services incidental to Internet	705	706	0.1%	1,979.7	2,031.9	2.6%	4,617.8	4,550.9	-1.4%	29.3	30.1	78.0%
Video picture information production and distribution	466	431	-7.5%	1,150.9	1,245.3	8.2%	1,217.7	1,373.9	12.8%	48.5	50.8	227.5%
Sound information production	127	102	-19.7%	1,215.1	1,442.4	18.7%	362.5	426.6	17.7%	33.5	30.1	-342.8%
Newspaper publishers	132	128	-3.0%	1,400.3	1,408.3	0.6%	2,313.1	2,345.9	1.4%	58.2	57.4	-85.4%
Publishers, except newspapers	368	349	-5.2%	1,187.6	1,202.3	1.2%	1,362.1	1,381.7	1.4%	55.4	54.6	-80.7%
Commercial art and graphic design	181	148	-18.2%	1,161.7	1,072.3	-7.7%	869.5	968.0	11.3%	57.0	56.8	-16.5%
Services incidental to video picture information, sound information, character information production and distribution	167	156	-6.6%	1,011.9	957.5	-5.4%	724.1	757.1	4.6%	57.7	61.5	3.7pt
(Reproduced) TV/radio program production work	393	364	-7.4%	1,101.8	1,146.9	4.1%	975.4	985.6	1.0%	55.3	56.2	0.9pt

(Notes) Labor productivity = Value added / Number of workers (Index to ascertain the amount of value added per worker)

Labor equipment ratio = Tangible fixed assets / Number of workers (Index to ascertain how much capital (tangible fixed assets) is used per worker)

Labor share = Total payroll / Value added × 100 (Index to ascertain how much of the generated amount of value added was allocated to personnel expenses)

Fig. 1-1-13 Labor Productivity, etc. of Companies that Responded to the Survey for the Second Consecutive Year

Overall	Number of companies			Labor productivity (10,000 yen/person)			Labor equipment ratio (10,000 yen/person)			Labor share (%)		
	FY2014	FY2015	Year-on-year	FY2014	FY2015	Year-on-year	FY2014	FY2015	Year-on-year	FY2014	FY2015	Year-on-year
Overall	4,791	4,791	-	1,429.7	1,533.9	7.3%	1,886.3	1,836.5	-2.6%	39.8	36.6	-3.2pt

## 6. Assets, liabilities, and net assets

- The total capital (total assets) of companies engaged in the information and communication business was 87.7148 trillion yen (down 0.6%) with current assets accounting for 36.1396 trillion yen (down 0.1%) and fixed assets accounting for 51.5273 trillion yen (down 1.0%).
- The total amount of assets per IC company was 16.02 billion yen (up 0.2%) and net assets per IC company were 7.66 billion yen (up 1.0%).

Fig. 1-1-14 Balance Sheet of Companies Engaged in the Information and Communications Business

		Assets										Liabilities and net assets						
		Number of companies	Current assets	Fixed assets	Assets			Deferred assets	Total	Liabilities		Net assets						
					Tangible fixed assets (included)	Intangible fixed assets (included)	Investments and other assets (included)			Current liabilities	Fixed liabilities	Equity						
											Capital	Capital surplus	Earned surplus	Treasury stock	Other	Total		
Overall	FY2014	5,519	361,594	520,589	294,783	42,148	183,617	385	882,575	245,795	218,210	80,541	94,665	243,985	- 14,839	14,196	882,575	
	FY2015	5,474	361,396	515,273	288,352	42,779	184,135	454	877,148	254,072	203,800	79,632	98,040	245,813	- 15,714	11,406	877,148	
	Year-on-year (%)	-	- 0.1	- 1.0	- 2.2	1.5	0.3	17.9	- 0.6	3.4	- 6.6	- 1.1	3.6	0.7	5.9	- 19.7	- 0.6	
Telecommunications	379	80,760	198,054	132,459	20,390	45,204	29	278,852	62,565	52,964	27,158	47,914	92,819	- 6,399	1,828	278,852		
Private broadcasting	390	17,721	20,958	11,582	554	8,817	11	38,706	6,168	3,987	2,958	9,259	14,633	- 86	1,693	38,706		
Cablecasting	221	4,993	14,219	10,713	377	3,129	15	19,226	4,602	4,580	2,969	2,386	4,619	- 50	120	19,226		
Software	2,880	132,549	93,376	30,402	13,915	49,058	249	226,174	87,187	35,884	23,105	19,110	60,929	- 3,607	3,567	226,174		
Data processing and information services	1,720	94,473	59,696	21,003	10,023	28,669	134	154,303	68,510	21,351	12,484	12,185	41,075	- 3,192	1,889	154,303		
Services incidental to Internet	706	73,685	163,832	101,939	5,498	56,394	48	237,566	53,073	101,116	22,697	22,246	39,973	- 3,806	2,267	237,566		
Video picture information production and distribution	431	14,148	13,168	7,009	359	5,800	28	27,343	6,331	3,537	1,770	6,617	8,012	- 254	1,328	27,343		
Sound information production	102	1,766	717	375	42	299	0	2,483	923	168	184	307	808	- 3	96	2,483		
Newspaper publishers	128	8,067	18,217	10,136	452	7,629	57	26,341	5,958	6,820	270	779	11,454	- 13	1,074	26,341		
Publishers, except newspapers	349	21,637	24,330	11,834	984	11,511	67	46,034	10,273	7,607	1,404	5,520	19,998	- 143	1,376	46,034		
Commercial art and graphic design	148	8,220	11,392	2,416	196	8,780	5	19,617	7,309	2,655	916	1,098	6,979	- 209	868	19,617		
Services incidental to video picture information, sound information, character information production and distribution	156	3,234	2,990	1,486	108	1,396	24	6,248	1,331	1,144	625	608	2,180	- 23	383	6,248		
(Reproduced) TV/radio program production work	364	6,415	5,293	3,013	150	2,129	22	11,730	2,879	1,389	990	2,223	4,047	- 44	242	11,730		

Fig. 1-1-15 Profits and Assets per Company

		Number of companies	Ordinary profit (100 million yen)	Total assets (Total capital) (100 million yen)	Net assets (Own capital) (100 million yen)	Return of asset ROA (%)	Turnover of total capital (times)	Capital adequacy ratio (%)
Overall	FY2014	5,519	10.4	159.9	75.8	6.5	0.84	47.4
	FY2015	5,474	11.3	160.2	76.6	7.0	0.82	47.8
	Difference from previous year (pt/company)	- 0.8	8.4	0.2	1.0	0.5pt	- 0.02times	0.4pt
Telecommunications	379	71.3	735.8	430.9	9.7	0.68	58.6	
Private broadcasting	390	6.3	99.2	73.0	6.3	0.73	73.5	
Cablecasting	221	6.6	87.0	45.4	7.6	0.63	52.2	
Software	2,880	5.3	78.5	35.8	6.8	1.14	45.6	
Data processing and information services	1,720	5.0	89.7	37.5	5.6	1.18	41.8	
Services incidental to Internet	706	19.3	336.5	118.1	5.7	0.61	35.1	
Video picture information production and distribution	431	3.6	63.4	40.5	5.7	0.92	63.9	
Sound information production	102	1.5	24.3	13.6	6.2	1.50	56.0	
Newspaper publishers	128	6.3	205.8	106.0	3.1	0.66	51.5	
Publishers, except newspapers	349	5.6	131.9	80.7	4.2	0.77	61.2	
Commercial art and graphic design	148	6.1	132.5	65.2	4.6	0.84	49.2	
Services incidental to video picture information, sound information, character information production and distribution	156	2.0	40.0	24.2	5.1	0.91	60.4	
(Reproduced) TV/radio program production work	364	2.1	32.2	20.5	6.4	1.10	63.6	

(Notes) Return of asset (ROA) = Ordinary profits / Total capital (total assets) × 100 (Profitability index to ascertain how much profit was obtained from the total capital invested)

Turnover of total capital = Sales / Total assets (total capital) (Efficiency index to ascertain how many times the amount of sales is as large as the amount of the total capital invested)

Capital adequacy ratio = Net assets (own capital) / Total assets (total capital) × 100 (Index to show the percentage of own capital among the total capital and thereby indicate the financial security)

## 7. Workers

- The number of workers for companies engaged in the information and communication business was 1,624,851 (down 0.7%), out of which full-time workers/regular staff members (hereinafter referred to as “full-time workers”) accounted for 81.1% at 1,317,193 (down 1.3%). The number of part-timers was 204,251 (down 2.9%) and that of dispatched workers was 138,075 (up 5.1%).
- The number of workers per company was 297, out of which 241 were full-time workers and 37 were part-timers.

Fig. 1-1-16 Number of workers

(Unit: companies, persons)

	Number of companies		Number of workers		Number of regular workers		Full-time workers/ Regular staff members		Part-timers		Other regular workers		Temporary or daily workers		Dispatched workers	
	FY2014	FY2015	FY2014	FY2015	FY2014	FY2015	FY2014	FY2015	FY2014	FY2015	FY2014	FY2015	FY2014	FY2015	FY2014	FY2015
	Overall	5,519	5,474	1,636,590	1,624,851	1,626,779	1,615,513	1,334,250	1,317,193	210,288	204,251	82,241	94,069	9,811	9,338	131,365
Year-on-year (%)		- 0.8		- 0.7		- 0.7		- 1.3		- 2.9		14.4		- 4.8		5.1
Telecommunications	371	379	167,014	161,142	166,469	160,387	130,844	116,270	15,763	16,267	19,862	27,850	545	755	22,494	19,881
Private broadcasting	371	390	35,964	40,298	35,544	39,835	25,106	27,567	7,988	9,592	2,450	2,676	420	463	5,506	6,114
Cablecasting	213	221	20,663	19,703	20,522	18,953	18,040	16,446	1,918	1,756	564	751	141	750	2,566	2,342
Software	2,889	2,880	864,599	871,744	861,307	868,870	804,850	806,075	34,409	33,968	22,048	28,827	3,292	2,874	75,494	81,073
Data processing and information services	1,738	1,720	640,979	645,967	638,438	641,569	459,726	462,190	146,303	146,913	32,409	32,466	2,541	4,398	63,267	62,935
Services incidental to Internet	705	706	232,782	224,000	230,404	223,355	201,763	198,809	18,024	15,292	10,617	9,254	2,378	645	24,418	25,544
Video picture information production and distribution	466	431	58,592	51,014	58,092	50,653	42,681	40,554	11,359	6,047	4,052	4,052	500	361	3,829	3,965
Sound information production	127	102	9,473	8,801	8,999	8,325	5,664	5,016	2,160	2,087	1,175	1,222	474	476	514	347
Newspaper publishers	132	128	43,855	43,206	43,559	42,980	38,345	37,614	3,863	3,877	1,351	1,489	296	226	1,293	1,367
Publishers, except newspapers	368	349	85,353	85,649	83,901	84,691	65,155	65,998	12,218	13,115	6,528	5,578	1,452	958	2,672	3,249
Commercial art and graphic design	181	148	28,071	24,960	27,886	24,857	19,888	18,412	3,006	2,606	4,992	3,839	185	103	1,858	1,518
Services incidental to video picture information, sound information, character information production and distribution	167	156	22,264	19,624	22,010	19,331	18,011	15,655	2,107	2,196	1,892	1,480	254	293	1,936	1,662
(Reproduced) TV/radio program production work	393	364	29,333	30,574	28,852	30,196	23,992	25,285	2,102	1,945	2,758	2,966	481	378	2,596	2,858

(Note) Other regular workers = Regular workers - Full-time workers/Regular staff members - Part-timers (meaning paid directors and contract workers, etc.)

Fig. 1-1-17 Number of Workers for Companies that Responded to the Survey for the Second Consecutive Year

(Unit: companies, persons)

	Number of companies		Number of workers		Number of regular workers		Full-time workers/ Regular staff members		Part-timers		Other regular workers		Temporary or daily workers		Dispatched workers	
	FY2014	FY2015	FY2014	FY2015	FY2014	FY2015	FY2014	FY2015	FY2014	FY2015	FY2014	FY2015	FY2014	FY2015	FY2014	FY2015
	Overall	4,791	4,791	1,515,564	1,551,058	1,506,494	1,542,130	1,241,476	1,257,365	187,047	196,885	77,971	87,880	9,070	8,928	124,146
Year-on-year (%)		-		2.3		2.4		1.3		5.3		12.7		- 1.6		7.1

Fig. 1-1-18 Number of Workers per Company

(Unit: companies, persons)

	Number of companies		Number of workers		Number of regular workers		Full-time workers/ Regular staff members		Part-timers		Other regular workers		Temporary or daily workers		Dispatched workers	
	FY2014	FY2015	FY2014	FY2015	FY2014	FY2015	FY2014	FY2015	FY2014	FY2015	FY2014	FY2015	FY2014	FY2015	FY2014	FY2015
	Overall	5,519	5,474	297	297	295	295	242	241	38	37	15	17	2	2	24
Year-on-year (persons)		-		0		0		-1		-1		2		0		1
Telecommunications	371	379	450	425	449	423	353	307	42	43	54	73	1	2	61	52
Private broadcasting	371	390	97	103	96	102	68	71	22	25	7	7	1	1	15	16
Cablecasting	213	221	97	89	96	86	85	74	9	8	3	3	1	3	12	11
Software	2,889	2,880	299	303	298	302	279	280	12	12	8	10	1	1	26	28
Data processing and information services	1,738	1,720	369	376	367	373	265	269	84	85	19	19	1	3	36	37
Services incidental to Internet	705	706	330	317	327	316	286	282	26	22	15	13	3	1	35	36
Video picture information production and distribution	466	431	126	118	125	118	92	94	24	14	9	9	1	1	8	9
Sound information production	127	102	75	86	71	82	45	49	17	20	9	12	4	5	4	3
Newspaper publishers	132	128	332	338	330	336	290	294	29	30	10	12	2	2	10	11
Publishers, except newspapers	368	349	232	245	228	243	177	189	33	38	18	16	4	3	7	9
Commercial art and graphic design	181	148	155	169	154	168	110	124	17	18	28	26	1	1	10	10
Services incidental to video picture information, sound information, character information production and distribution	167	156	133	126	132	124	108	100	13	14	11	9	2	2	12	11
(Reproduced) TV/radio program production work	393	364	75	84	73	83	61	69	5	5	7	8	1	1	7	8

(Note) Other regular workers = Regular workers - Full-time workers/Regular staff members - Part-timers (meaning paid directors and contract workers, etc.)



## 8. Ownership of subsidiaries and affiliated companies

- The number of companies that own subsidiaries<sup>(Note 1)</sup> of information and communication companies was 1,757, which own 9,806 subsidiaries.
- Commercial art and graphic design owned the largest number of subsidiaries per company (22.3), followed by sound information production (9.9) and the newspaper publishers (9.3).
- The balance of investments and loans to related companies<sup>(Note 2)</sup> per company was 4.01 billion yen (up 4.1%).

(Note 1) Subsidiaries include affiliated companies.

(Note 2) Related companies refer to subsidiaries, affiliated companies, and parent companies.

Fig. 1-19 Ownership of subsidiaries

		(Unit: 1 company)							
		Number of companies	Number of companies owning subsidiaries	Percentage of companies that own subsidiaries (%)	Number of subsidiaries	Number of subsidiaries owned per company	Overseas		
							Number of companies that own overseas subsidiaries (A)	Number of overseas subsidiaries (B)	Number of overseas subsidiaries owned per company (B/A)
Overall	FY2014	5,519	1,760	31.9	9,510	5.4	552	3,064	5.6
	FY2015	5,474	1,757	32.1	9,806	5.6	561	3,205	5.7
	Difference from previous year (pt/company)	- 0.8%	- 0.2%	0.2pt	3.1	0.2社	1.6%	4.6%	0.2
Telecommunications		379	97	25.6	793	8.2	23	83	3.6
Private broadcasting		390	130	33.3	472	3.6	7	17	2.4
Cablecasting		221	37	16.7	112	3.0	1	X	X
Software		2,880	911	31.6	4,110	4.5	353	1,612	4.6
Data processing and information services		1,720	509	29.6	2,504	4.9	167	754	4.5
Services incidental to Internet		706	307	43.5	1,945	6.3	115	525	4.6
Video picture information production and distribution		431	142	32.9	484	3.4	29	56	1.9
Sound information production		102	23	22.5	228	9.9	2	X	-
Newspaper publishers		128	70	54.7	651	9.3	6	27	4.5
Publishers, except newspapers		349	153	43.8	782	5.1	30	76	2.5
Commercial art and graphic design		148	43	29.1	960	22.3	9	760	84.4
Services incidental to video picture information, sound information, character information production and distribution		156	43	27.6	182	4.2	11	27	2.5
(Reproduced) TV/radio program production work		364	91	25.0	290	3.2	12	25	2.1

Fig. 1-1-20 Investments and Loans to Related Companies

		(Unit: 1 company, 100 million yen)										
		Number of companies that made investments and loans	Total investment and loan balance	Investment and loan balance per company	Domestic				Overseas			
					Number of companies	Total investment and loan balance			Number of companies	Total investment and loan balance		
						Share and contribution balance (included)	Long-term loans (included)			Share and contribution balance (included)	Long-term loans (included)	
Overall	FY2014	1,576	60,739	38.5	1,403	46,259	35,265	6,065	443	14,480	11,113	1,018
	FY2015	1,566	62,829	40.1	1,398	40,073	30,019	5,016	446	22,756	19,246	1,554
	Year-on-year (%)	- 0.6	3.4	4.1	- 0.4	- 13.4	- 14.9	- 17.3	0.7	57.2	73.2	52.6
Telecommunications		89	11,384	127.9	84	10,729	8,341	1,978	17	654	303	330
Private broadcasting		121	1,315	10.9	120	1,270	868	202	7	45	24	-
Cablecasting		39	1,086	27.8	39	X	824	38	2	X	X	X
Software		789	13,692	17.4	680	8,770	4,812	309	269	4,921	2,752	248
Data processing and information services		456	10,951	24.0	413	8,333	3,256	788	131	2,618	630	113
Services incidental to Internet		283	24,490	86.5	246	15,143	12,955	1,784	96	9,348	8,917	423
Video picture information production and distribution		118	1,665	14.1	108	1,638	1,405	216	23	28	24	1
Sound information production		22	22	1.0	21	X	18	3	1	X	X	X
Newspaper publishers		68	3,298	48.5	66	1,593	1,392	164	6	1,706	1,701	4
Publishers, except newspapers		145	2,424	16.7	134	2,156	1,579	551	28	269	249	20
Commercial art and graphic design		39	6,569	168.4	35	934	835	99	9	5,635	5,152	482
Services incidental to video picture information, sound information, character information production and distribution		40	583	14.6	38	574	534	25	8	9	9	0
(Reproduced) TV/radio program production work		79	816	10.3	76	804	689	100	8	12	12	0

## 9. Outsourcing

- The number of companies implementing outsourcing was 4,333 (up 0.9%) and the outsourcing costs were 10.1 trillion yen (down 0.2%).
- The number of companies that outsourced their manufacturing work was 2,015 (down 6.0%) and the number of companies that outsourced work other than manufacturing was 3,668 (up 1.8%), accounting for 37.3% and 67.9% of the total, respectively.
- Looking at outsourcing content for companies that outsourced work other than manufacturing, the number of companies was the largest for “Data processing related” work at 66.2%.

Fig. 1-1-21 Outsourcing

(Unit: 1 company)

		Number of companies	Implemented outsourcing			Did not implement outsourcing	Outsourcing cost					
			Outsourcing of manufacturing work	Outsourcing of work other than manufacturing	Number of companies responded		Outsourcing cost (100 million yen)	Outsourcing cost of manufacturing work		Outsourcing cost of work other than manufacturing		
								Number of companies responded	Outsourcing cost (100 million yen)	Number of companies responded	Outsourcing cost (100 million yen)	
Overall	FY2014	5,432	4,295	2,143	3,604	1,137	4,163	101,204	2,106	44,503	3,274	56,701
	FY2015	5,402	4,333	2,015	3,668	1,069	4,220	100,961	1,974	41,914	3,407	59,047
	Year-on-year (%)	- 0.6	0.9	- 6.0	1.8	- 6.0	1.4	- 0.2	- 6.3	- 5.8	4.1	4.1
Telecommunications		367	294	89	271	73	290	18,754	86	815	265	17,939
Private broadcasting		366	267	136	239	99	263	3,440	129	2,311	227	1,128
Cablecasting		214	160	43	155	54	159	940	43	54	152	886
Software		2,878	2,410	1,222	1,943	468	2,360	60,038	1,209	32,568	1,793	27,471
Data processing and information services		1,718	1,401	535	1,252	317	1,359	24,620	524	7,897	1,167	16,723
Services incidental to Internet		699	599	252	542	100	582	15,473	244	5,320	505	10,153
Video picture information production and distribution		405	302	176	250	103	293	4,575	173	3,075	225	1,501
Sound information production		92	72	32	60	20	71	399	29	248	56	151
Newspaper publishers		127	97	75	81	30	95	2,189	74	1,729	78	459
Publishers, except newspapers		346	280	195	244	66	273	6,013	191	4,636	229	1,377
Commercial art and graphic design		146	115	63	99	31	114	691	62	299	94	391
Services incidental to video picture information, sound information, character information production and distribution		154	123	75	102	31	117	1,000	73	716	87	284
(Reproduced) TV/radio program production work		334	237	120	197	97	228	2,128	117	1,043	176	1,085

Fig. 1-1-22 Outsourcing Other Than Manufacturing (Composition ratios) (Multiple answers allowed)

(Unit: 1 company, %)

		Number of companies responded	Percentage of outsourcing of work other than manufacturing by work											
			Data processing related	Research/ marketing	Design/ product planning	General clerical work	Workers' welfare related	Specific areas such as tax/ accounting	Worker education such as in-house training	Public relations	Logistics related	Environment/ security relate	R&D related areas	Other
			Overall	FY2014	3,581	65.5	15.8	14.3	25.6	11.8	35.9	18.3	8.2	23.5
	FY2015	3,656	66.2	16.4	14.3	25.0	12.4	36.1	19.0	8.3	23.1	31.3	5.0	21.5
	Year-on-year (%)	2.1%	0.7pt	0.7pt	0.0pt	- 0.6pt	0.5pt	0.2pt	0.7pt	0.1pt	- 0.4pt	- 0.7pt	0.5pt	0.5pt
Telecommunications		266	53.0	25.6	13.9	32.3	17.7	43.2	22.9	19.2	26.7	41.0	5.6	43.6
Private broadcasting		234	35.9	19.2	20.1	29.5	10.3	33.8	10.3	31.6	20.5	50.9	1.3	49.6
Cablecasting		151	35.1	24.5	10.6	31.8	15.9	41.7	19.9	22.5	15.9	33.1	2.0	49.0
Software		1,943	77.1	11.4	8.5	22.4	11.6	31.6	20.2	3.5	14.9	22.7	5.7	12.1
Data processing and information services		1,252	76.8	17.7	11.1	28.8	12.6	33.3	20.5	5.0	23.6	30.6	5.1	16.3
Services incidental to Internet		541	66.0	25.9	27.2	27.7	15.7	42.5	24.0	10.4	26.8	34.6	7.8	26.2
Video picture information production and distribution		247	40.9	19.0	26.7	20.6	10.9	47.8	14.6	10.1	26.7	43.7	1.6	42.5
Sound information production		57	35.1	8.8	19.3	12.3	7.0	38.6	7.0	8.8	22.8	36.8	0.0	42.1
Newspaper publishers		81	42.0	12.3	27.2	23.7	16.0	19.8	14.8	29.6	53.1	56.8	0.0	17.3
Publishers, except newspapers		245	53.1	24.5	35.9	23.7	15.5	38.8	15.9	15.5	63.7	50.2	5.7	26.1
Commercial art and graphic design		99	40.4	27.3	48.5	23.2	12.1	47.5	19.2	5.1	42.4	37.4	3.0	33.3
Services incidental to video picture information, sound information, character information production and distribution		101	47.5	9.9	19.8	19.8	14.9	50.5	13.9	6.9	33.7	40.6	3.0	41.6
(Reproduced) TV/radio program production work		193	34.2	11.4	22.8	15.0	7.3	43.5	9.8	9.8	18.1	40.4	1.0	49.2

## 10. Research and development

- Of the companies engaged in the information and communications business, 948 companies (17.3% of the total) conducted research and development (R&D).
- The R&D expenses were 994.2 billion yen (up 0.6%), the in-house R&D expenses were 772.2 billion yen (77.7% of the R&D expenses), the outsourced R&D expenses were 222.0 billion yen, and the ratio of R&D expenses to sales<sup>(Note)</sup> was 2.6% (down 0.2 points).
- The ratio of R&D expenses to sales was the highest for software services (4.2%), followed by data processing and information services (3.0%), services incidental to video picture information, sound information, character information production and distribution (2.5%), and telecommunications (1.7%).

(Note) Calculated based on the number of companies for which there were valid responses.

Fig. 1-1-23 Percentage of Companies that Conducted Research and Development

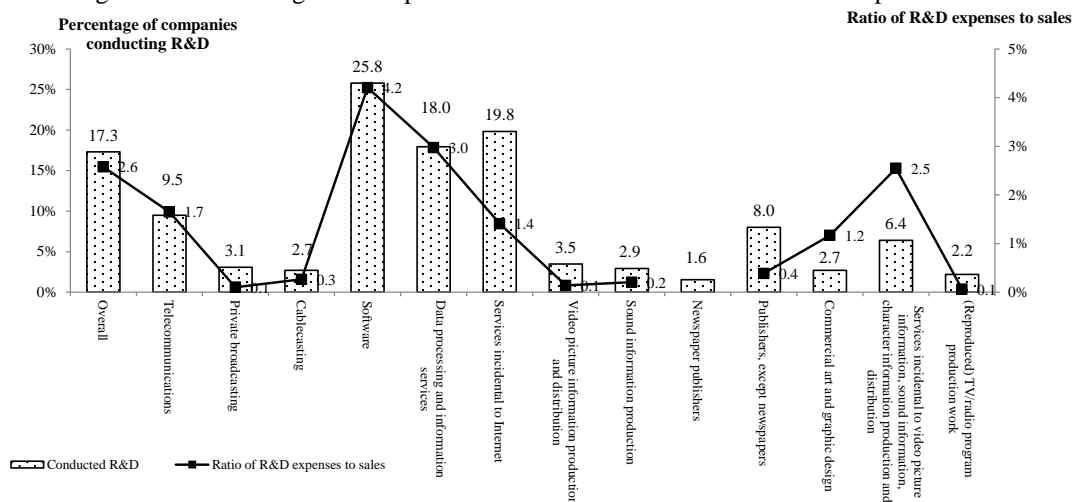


Fig. 1-1-24 R&D Expenses

(Unit: 1 company, 100 million yen, %)

	Number of companies	Number of companies that conducted R&D		Sales	Total R&D expenses			Ratio of R&D expenses to sales	
		Number of companies that conducted R&D	Number of companies that provided the R&D expenses		In-house R&D expenses	Outsourced R&D expenses			
Overall	FY2014	5,519	978	901	356,768	9,883	7,743	2,139	2.8
	FY2015	5,474	948	877	385,835	9,942	7,722	2,220	2.6
	Y/Y change (pt)	- 0.8	- 3.1	- 2.7	8.1	0.6	- 0.3	3.8	- 0.2pt
Telecommunications	379	36	33	134,308	2,217	1,385	833	1.7	
Private broadcasting	390	12	11	14,154	15	11	4	0.1	
Cablecasting	221	6	5	1,495	4	0	4	0.3	
Software	2,880	743	697	150,561	6,330	5,512	818	4.2	
Data processing and information services	1,720	309	283	63,450	1,886	1,765	122	3.0	
Services incidental to Internet	706	140	128	93,709	1,321	762	559	1.4	
Video picture information production and distribution	431	15	14	7,995	11	9	2	0.1	
Sound information production	102	3	3	170	0	0	0	0.2	
Newspaper publishers	128	2	1	X	X	X	X	X	
Publishers, except newspapers	349	28	22	6,935	27	26	1	0.4	
Commercial art and graphic design	148	4	4	236	3	2	1	1.2	
Services incidental to video picture information, sound information, character information production and distribution	156	10	10	562	14	14	0	2.5	
(Reproduced) TV/radio program production work	364	8	7	2,819	2	2	0	0.1	

(Note) Sales and ratio of R&D expenses to sales are counted using the number of companies that provided the R&D expenses.

## Section 2: Results Based on Companies Rated as Mainly Engaged in the IC Business

### 1. Outline of survey results

- The number of companies rated as information and communications companies (IC companies) (meaning companies which earn more sales from the IC business than from any other) was 4,686 (up 0.3%) in FY2015. The number of establishments was 18,137 (up 1.7%) and the number of regular workers was 1,226,397 (up 2.2%).
- The total sales by IC companies were 50.2474 trillion yen (up 1.8%), out of which 46.5774 trillion yen (up 4.2%) were sales from the information and communications business. The operating profit was 5.1000 trillion yen (up 15.2%) and the ordinary profit was 5.1518 trillion yen (up 12.2%).

(Note) Data shown in “Section 2: Results Based on Companies Rated as Mainly Engaged in the IC Business” are those for IC companies.

Fig. 1-2-1 Outline (Based on Companies Rated as Mainly Engaged in the IC Business)

		Number of companies	Number of establishments	Number of workers (persons)	Number of regular workers (persons)	Sales	Sales from the IC business	Operating profit	Ordinary profit
						(100 million yen)	(100 million yen)	(100 million yen)	(100 million yen)
IC companies	FY2014	4,670	17,829	1,205,714	1,199,459	493,382	447,146	44,269	45,924
	FY2016	4,686	18,137	1,233,224	1,226,397	502,474	465,774	51,000	51,518
	Year-on-year (%)	0.3	1.7	2.3	2.2	1.8	4.2	15.2	12.2
Telecommunications	FY2014	124	1,449	117,113	116,594	178,962	170,121	22,491	22,342
	FY2016	139	1,429	110,678	109,939	173,261	172,487	26,561	25,390
	Year-on-year (%)	12.1	- 1.4	- 5.5	- 5.7	- 3.2	1.4	18.1	13.6
Private broadcasting	FY2014	333	988	25,991	25,619	22,795	21,772	1,470	1,561
	FY2016	347	983	28,112	27,745	26,218	25,099	2,106	2,181
	Year-on-year (%)	4.2	- 0.5	8.2	8.3	15.0	15.3	43.3	39.7
Cablecasting	FY2014	179	479	13,334	13,307	6,315	6,247	869	799
	FY2016	179	443	12,653	12,642	6,444	6,406	899	815
	Year-on-year (%)	0.0	- 7.5	- 5.1	- 5.0	2.0	2.6	3.3	2.0
Software	FY2014	2,150	6,340	608,870	607,629	172,308	146,413	9,274	10,439
	FY2016	2,177	6,666	621,592	620,724	172,779	148,281	8,874	10,200
	Year-on-year (%)	1.3	5.1	2.1	2.2	0.3	1.3	- 4.3	- 2.3
Data processing and information services	FY2014	852	4,114	279,093	277,424	50,621	45,249	3,563	3,798
	FY2016	878	4,228	298,188	294,186	57,210	51,459	3,915	4,197
	Year-on-year (%)	3.1	2.8	6.8	6.0	13.0	13.7	9.9	10.5
Services incidental to Internet	FY2014	286	763	58,236	56,678	21,604	20,513	4,606	4,972
	FY2016	272	780	61,898	61,684	26,587	25,923	6,362	6,614
	Year-on-year (%)	- 4.9	2.2	6.3	8.8	23.1	26.4	38.1	33.0
Video picture information production and distribution	FY2014	284	576	23,209	22,950	8,882	7,600	588	681
	FY2016	258	487	23,947	23,823	9,014	7,849	634	721
	Year-on-year (%)	- 9.2	- 15.5	3.2	3.8	1.5	3.3	7.8	5.9
TV program production	FY2014	213	418	15,916	15,682	4,274	4,004	160	201
	FY2016	194	309	16,509	16,400	4,792	4,511	177	215
	Year-on-year (%)	- 8.9	- 26.1	3.7	4.6	12.1	12.7	10.4	7.1
Sound information production	FY2014	42	91	3,197	3,175	2,257	2,007	506	80
	FY2016	29	61	2,368	2,361	1,934	1,663	620	65
	Year-on-year (%)	- 31.0	- 33.0	- 25.9	- 25.6	- 14.3	- 17.1	22.6	- 18.8
Radio program production	FY2014	28	43	500	478	57	52	1	1
	FY2016	17	19	334	327	43	39	0	0
	Year-on-year (%)	- 39.3	- 55.8	- 33.2	- 31.6	- 25.0	- 24.2	- 82.6	- 79.8
Newspaper publishers	FY2014	111	2,053	40,737	40,445	17,008	15,216	600	730
	FY2016	110	2,179	40,359	40,164	16,670	14,888	616	753
	Year-on-year (%)	- 0.9	6.1	- 0.9	- 0.7	- 2.0	- 2.2	2.8	3.1
Publishers, except newspapers	FY2014	194	614	25,069	24,954	10,576	10,237	250	456
	FY2016	188	544	23,776	23,692	10,471	10,084	370	512
	Year-on-year (%)	- 3.1	- 11.4	- 5.2	- 5.1	- 1.0	- 1.5	48.0	12.2
Commercial art and graphic design	FY2014	53	143	4,536	4,469	888	774	26	31
	FY2016	50	122	3,242	3,187	767	703	25	26
	Year-on-year (%)	- 5.7	- 14.7	- 28.5	- 28.7	- 13.6	- 9.2	- 2.7	- 16.2
Services incidental to video picture information, sound information, character information production and distribution	FY2014	62	219	6,329	6,215	1,167	996	26	35
	FY2016	59	215	6,411	6,250	1,120	932	19	45
	Year-on-year (%)	- 4.8	- 1.8	1.3	0.6	- 4.0	- 6.4	- 28.3	28.4

(Note 1) “Sales from the IC business” refers to sales related to the information and communication business.

(Note 2) Year-on-year changes in sales, operating profits, and ordinary profits are calculated in 1 million yen units.

- The number of establishments per IC company was 3.9 (up 0.1 points), and the number of regular workers was 262 (up 1.9%).
- The sales per company were 10.72 billion yen (up 1.5%), out of which 9.94 billion yen (up 3.8%) were sales from the information and communications business. The operating profit was 1.09 billion yen (up 14.8%) and the ordinary profit was 1.10 billion yen (up 11.8%).

Fig. 1-2-2 Outline (Per Company)

		Number of establishments	Number of workers (persons)	Number of regular workers (persons)	Sales		Operating profit (million yen)	Ordinary profit (million yen)
					(million yen)	Sales from the IC business (million yen)		
IC companies	FY2014	3.8	258	257	10,564.9	9,574.9	947.9	983.4
	FY2015	3.9	263	262	10,722.9	9,939.7	1,088.3	1,099.4
	Year-on-year (%)	0.1	1.9	1.9	1.5	3.8	14.8	11.8
Telecommunications	FY2014	11.7	944	940	144,324.2	137,194.4	18,138.2	18,018.0
	FY2015	10.3	796	791	124,648.0	124,091.4	19,108.7	18,265.8
	Year-on-year (%)	- 1.4	- 15.7	- 15.9	- 13.6	- 9.6	5.4	1.4
Private broadcasting	FY2014	3.0	78	77	6,845.4	6,538.1	441.4	468.7
	FY2015	2.8	81	80	7,555.7	7,233.2	607.0	628.6
	Year-on-year (%)	- 0.2	3.8	3.9	10.4	10.6	37.5	34.1
Cablecasting	FY2014	2.7	74	74	3,527.7	3,489.8	485.7	446.1
	FY2015	2.5	71	71	3,599.7	3,578.9	502.0	455.1
	Year-on-year (%)	- 0.2	- 4.1	- 4.1	2.0	2.6	3.4	2.0
Software	FY2014	2.9	283	283	8,014.3	6,809.9	431.4	485.5
	FY2015	3.1	286	285	7,936.6	6,811.2	407.6	468.5
	Year-on-year (%)	0.2	1.1	0.7	- 1.0	0.0	- 5.5	- 3.5
Data processing and information services	FY2014	4.8	328	326	5,941.4	5,310.9	418.2	445.8
	FY2015	4.8	340	335	6,515.9	5,861.0	445.9	478.1
	Year-on-year (%)	0.0	3.7	2.8	9.7	10.4	6.6	7.2
Services incidental to Internet	FY2014	2.7	204	198	7,553.8	7,172.5	1,610.6	1,738.3
	FY2015	2.9	228	227	9,774.5	9,530.5	2,339.1	2,431.8
	Year-on-year (%)	0.2	11.8	14.6	29.4	32.9	45.2	39.9
Video picture information production and distribution	FY2014	2.0	82	81	3,127.3	2,676.0	207.0	239.6
	FY2015	1.9	93	92	3,493.9	3,042.2	245.6	279.4
	Year-on-year (%)	- 0.1	13.4	13.6	11.7	13.7	18.6	16.6
TV program production	FY2014	2.0	75	74	2,006.5	1,879.9	75.2	94.4
	FY2015	1.6	85	85	2,470.4	2,325.5	91.1	111.0
	Year-on-year (%)	- 0.4	13.3	14.9	23.1	23.7	21.1	17.6
Sound information production	FY2014	2.2	76	76	5,373.7	4,779.6	1,203.7	191.4
	FY2015	2.1	82	81	6,668.0	5,736.1	2,136.6	225.1
	Year-on-year (%)	- 0.1	7.9	6.6	24.1	20.0	77.5	17.6
Radio program production	FY2014	1.5	18	17	202.5	185.0	3.9	4.1
	FY2015	1.1	20	19	250.2	230.9	1.1	1.4
	Year-on-year (%)	- 0.4	11.1	11.8	23.6	24.8	- 71.8	- 65.9
Newspaper publishers	FY2014	18.5	367	364	15,322.7	13,707.7	540.3	658.1
	FY2015	19.8	367	365	15,154.2	13,534.4	560.3	684.3
	Year-on-year (%)	1.3	0.0	0.3	- 1.1	- 1.3	3.7	4.0
Publishers, except newspapers	FY2014	3.2	129	129	5,451.7	5,276.9	128.8	235.3
	FY2015	2.9	126	126	5,569.7	5,363.8	196.6	272.3
	Year-on-year (%)	- 0.3	- 2.3	- 2.3	2.2	1.6	52.6	15.7
Commercial art and graphic design	FY2014	2.7	86	84	1,675.2	1,460.5	48.9	57.7
	FY2015	2.4	65	64	1,534.3	1,405.2	50.4	51.3
	Year-on-year (%)	- 0.3	- 24.4	- 23.8	- 8.4	- 3.8	3.1	- 11.1
Services incidental to video picture information, sound information, character information production & distribution	FY2014	3.5	102	100	1,882.1	1,607.2	41.9	56.0
	FY2015	3.6	109	106	1,898.7	1,580.2	31.6	75.5
	Year-on-year (%)	0.1	6.9	6.0	0.9	- 1.7	- 24.6	34.8

(Note) The year-on-year comparison for the number of establishments per company represents the difference as compared to the previous fiscal year.

## 2. Number of companies

- Looking at the number of IC companies in terms of the composition ratio by capital, companies with “Less than 100 million yen” accounted for 59.6% (up 0.1 points) of the total.
- By sales, companies with “Less than 1 billion yen” accounted for 45.7% (down 1.6 points).
- By number of regular workers, companies with “Less than 100 workers” accounted for 59.6% (down 0.7 points).

Fig. 1-2-3 Composition Ratios of IC Companies by Capital

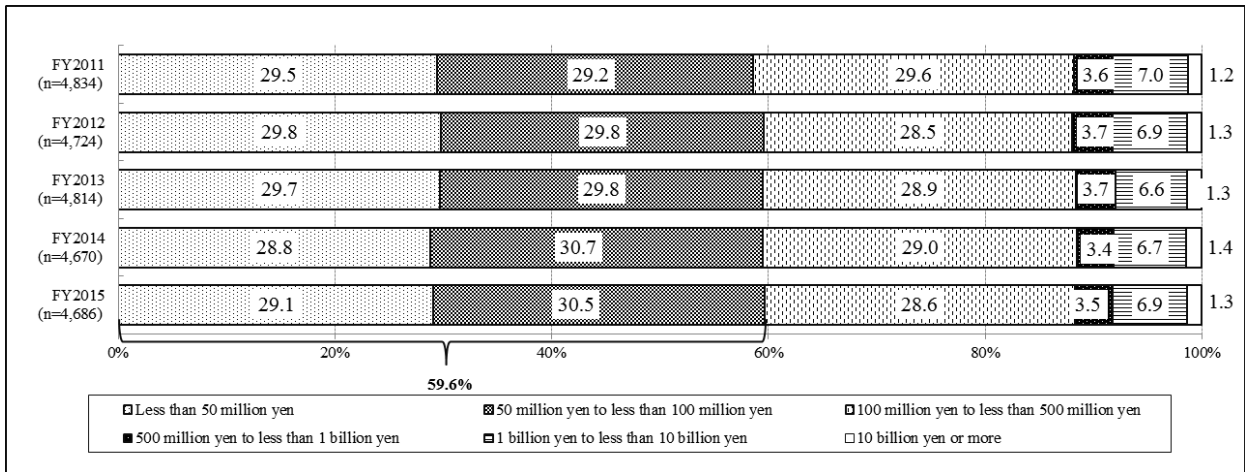


Fig. 1-2-4 Composition Ratios of IC Companies by Sales

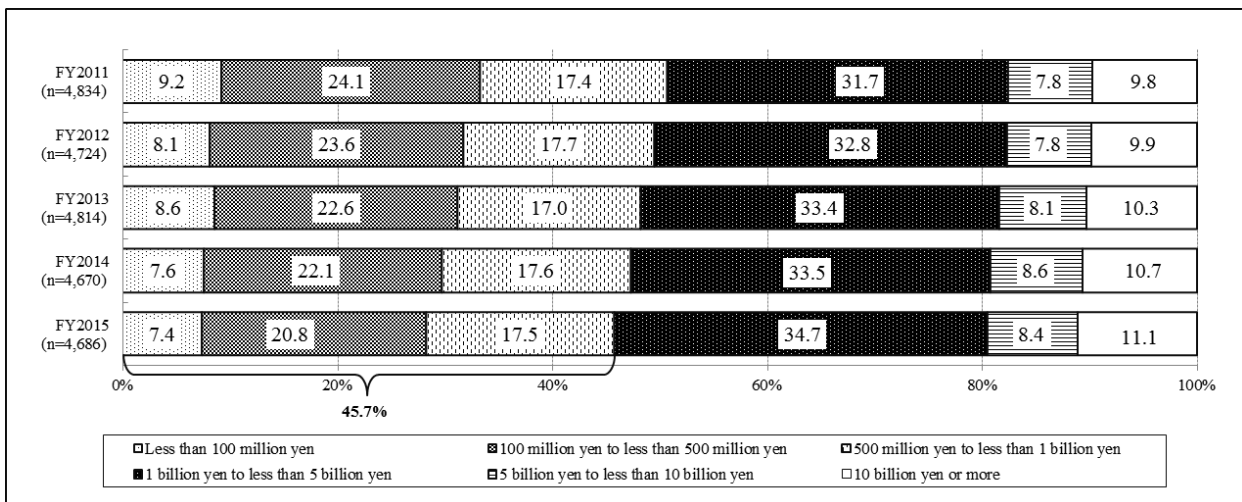
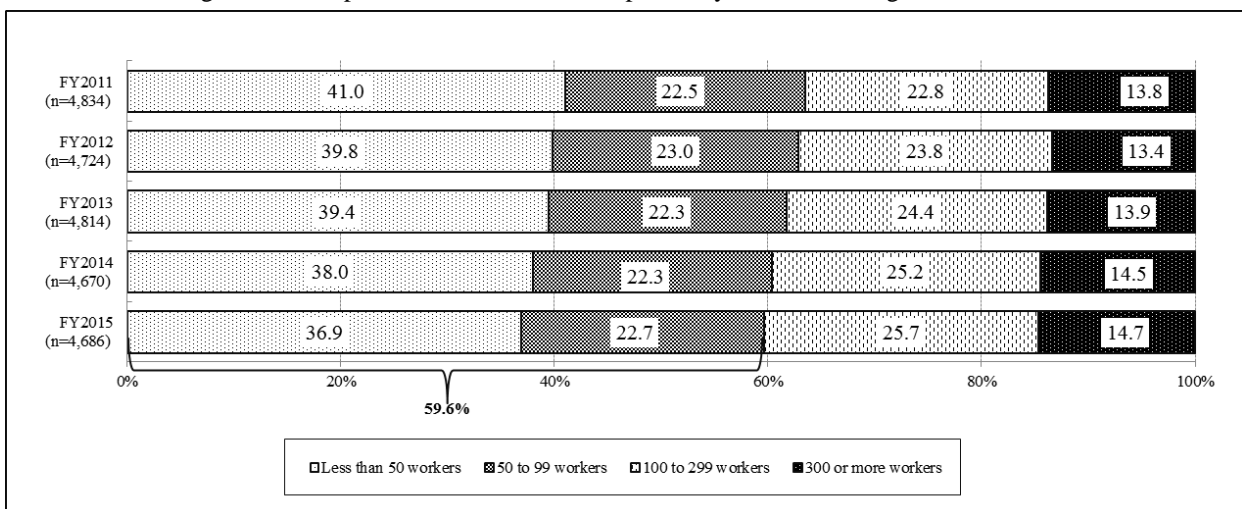


Fig. 1-2-5 Composition Ratios of IC Companies by Number of Regular Workers

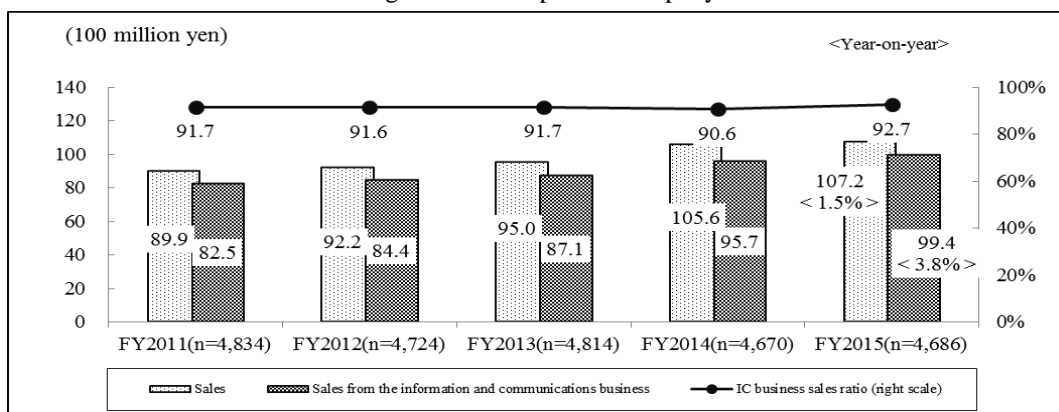


### 3. Sales and profits

- The sales per IC company were 10.72 billion yen (up 1.5%<sup>(Note)</sup>). The sales from the information and communications business were 9.94 billion yen (up 3.8%), making up 92.7% of total sales (up 2.1 points).
- The operating profit per IC company was 1.09 billion yen (up 14.8%<sup>(Note)</sup>), and ordinary profit per IC company was 1.10 billion yen (up 11.8%). Current net income per IC company was 700 million yen (up 17.9%), showing an upward trend.
- The operating margin was 10.1% (up 1.1 points), the ratio of ordinary profit to sales was 10.3% (up 1.0 points), and the income margin was 6.5% (up 0.9 points).

(Note) Calculated in 1 million yen units.

Fig. 1-2-6 Sales per IC Company



(Note) IC business sales ratio = IC business sales / Sales × 100. Calculated in 1 million yen units.

Fig. 1-2-7 Profits per IC Company

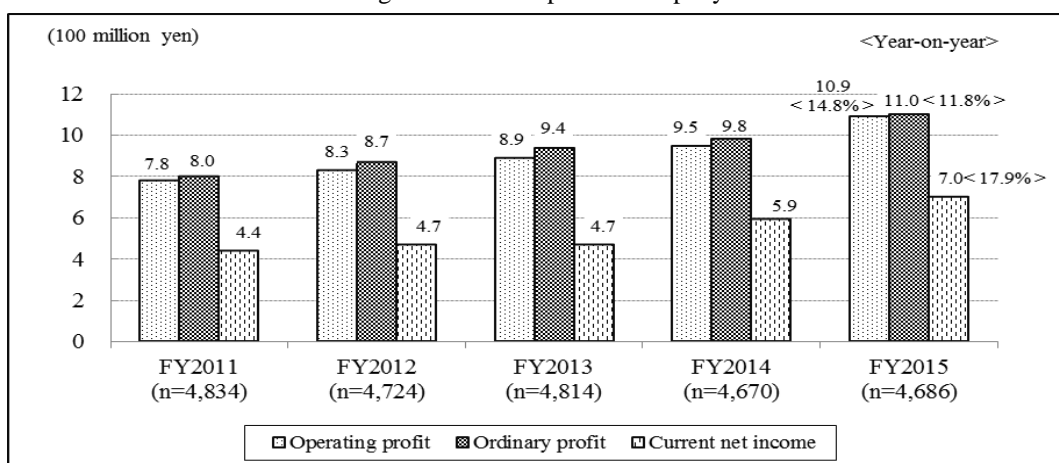
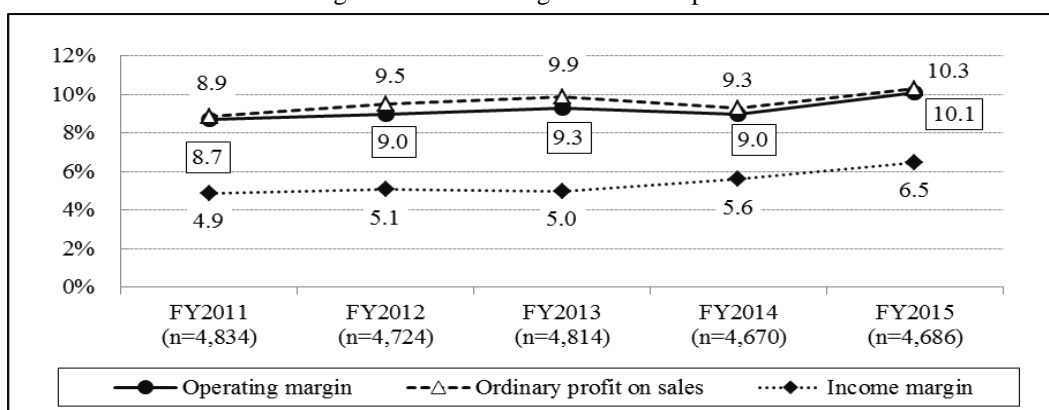


Fig. 1-2-8 Profit Margin of IC Companies



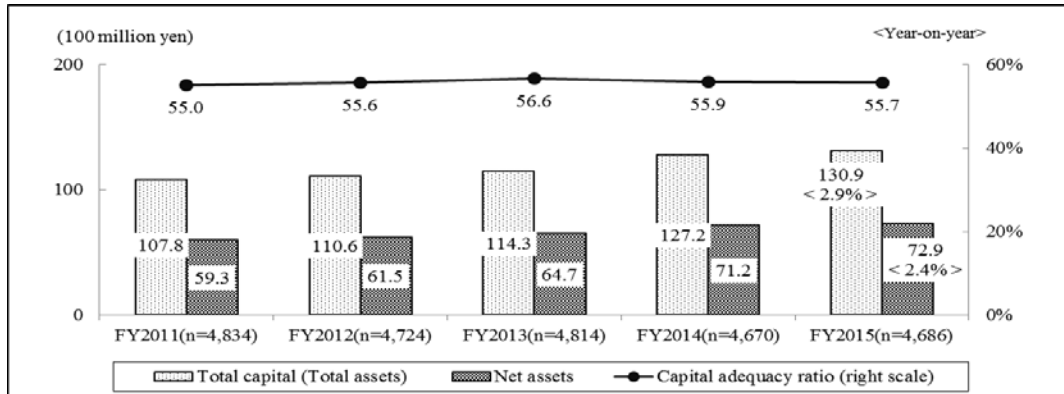
(Notes) Operating margin = Operating profit / Sales × 100 (Profitability index to ascertain how much profit was obtained from operation activities related to the main business from among total sales)  
 Ratio of ordinary profit to sales = Ordinary profit / Sales × 100 (Profitability index to ascertain how much profit was obtained from ordinary activities (operations and financial transactions) from among sales)  
 Income margin = Current net income / Sales × 100 (Profitability index to ascertain how much profit was ultimately obtained by the company)  
 The operating margin, ratio of ordinary profit to sales, and income margin are calculated in 1 million yen units.

#### 4. Assets and added values

- The total amount of assets per IC company was 13.09 billion yen (up 2.9%<sup>(Note)</sup>) and net assets per IC company were 7.29 billion yen (up 2.4%). The capital adequacy ratio was 55.7% (down 0.2 points).
- The added value per IC company was 4.23 billion yen (up 11.3%<sup>(Note)</sup>). The ratio of value added was 39.4% (up 3.5 points) and labor productivity was 16.145 million yen/person (up 9.2%). The labor equipment ratio was 14.907 million yen/person (down 3.1%).

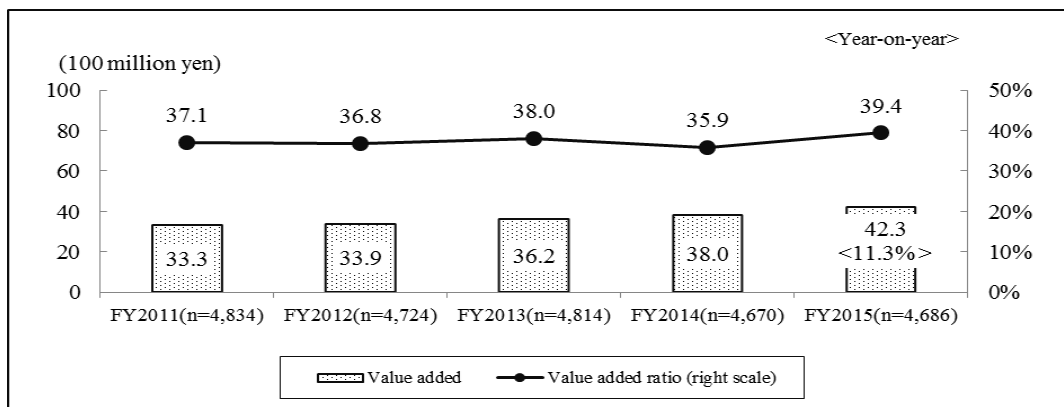
(Note) Calculated in 1 million yen units.

Fig. 1-2-9 Assets per IC Company



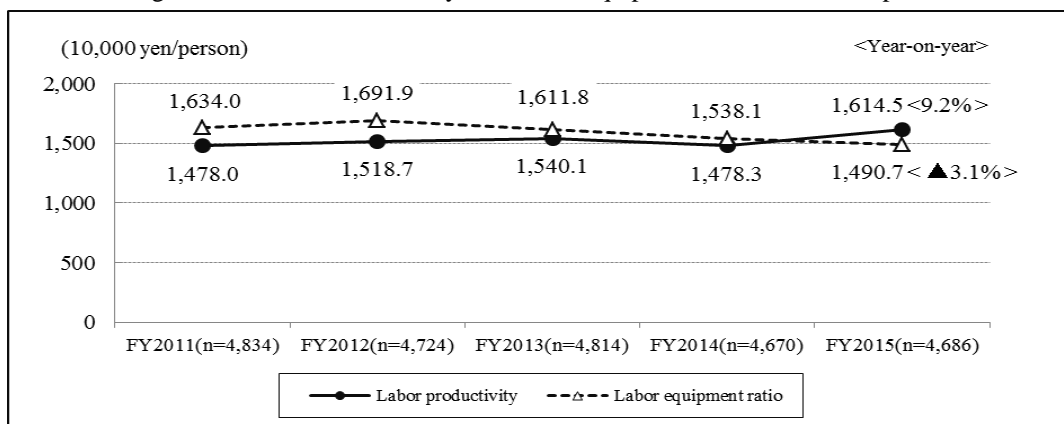
(Notes) Capital adequacy ratio = Net assets / Total capital (total assets) × 100. Index shows the percentage of owned capital among total capital and thereby serves as an indication of financial security. Calculated in 1 million yen units.

Fig. 1-2-10 Added Value per IC Company



(Notes) Value added = Operating profit + Depreciation expenses + Total payroll + Welfare expenses + Real estate and movables property rental + Taxes and public imposition.  
Ratio of value added = Value added / Sales × 100. Productivity index to ascertain the newly produced value by companies. Calculated in 1 million yen units.

Fig. 1-2-11 Labor Productivity and Labor Equipment Ratio of IC Companies



(Notes) Labor productivity = Value added / Number of regular workers. Index to ascertain the amount of value added per worker.  
Labor equipment ratio = Tangible fixed assets / Number of regular workers. Index to ascertain how much capital (tangible fixed assets) is used per worker.



**5. Workers**

- The total number of regular workers at IC companies was 1,226,397 (up 2.2%), out of which 1,054,533 (up 1.2%) were full-time workers/regular staff members and 104,226 (up 6.0%) were part-timers. The number of dispatched workers was 117,081 (up 5.7%).
- The number of regular workers per IC company was 261.7 (up 4.9 workers), out of which 225.0 were full-time workers/regular staff members (up 1.9 workers) and 22.2 were part-timers (up 1.2 workers). The number of dispatched workers was 25.0 (up 1.3 workers).
- Looking at the composition ratio of regular workers, full-time workers/regular staff members represented 86.0% (down 0.9 points), and the ratio was on a yearly downward trend. Part-timers represented 8.5% (up 0.3 points).

Fig. 1-2-12 Workers at IC Companies

	Number of workers (persons)			Number of Workers per IC Company (persons)		
	FY2014 (n=4,670)	FY2015 (n=4,686)	Year-on-year (%)	FY2014	FY2015	Y/Y change (person)
Workers	1,205,714	1,233,224	2.3	258.2	263.2	5.0
Regular workers	1,199,459	1,226,397	2.2	256.8	261.7	4.9
Full-time workers/ Regular staff members	1,041,772	1,054,533	1.2	223.1	225.0	1.9
Part-timers	98,290	104,226	6.0	21.0	22.2	1.2
Other regular workers	59,397	67,638	13.9	12.7	14.4	1.7
Temporary or daily workers	6,255	6,827	9.1	1.3	1.5	0.2
Dispatched workers	110,742	117,081	5.7	23.7	25.0	1.3

(Note) Other regular workers = Regular workers - Full-time workers/Regular staff members - Part-timers (meaning paid directors and contract workers, etc.).

Fig. 1-2-13 Number of Workers per IC Company

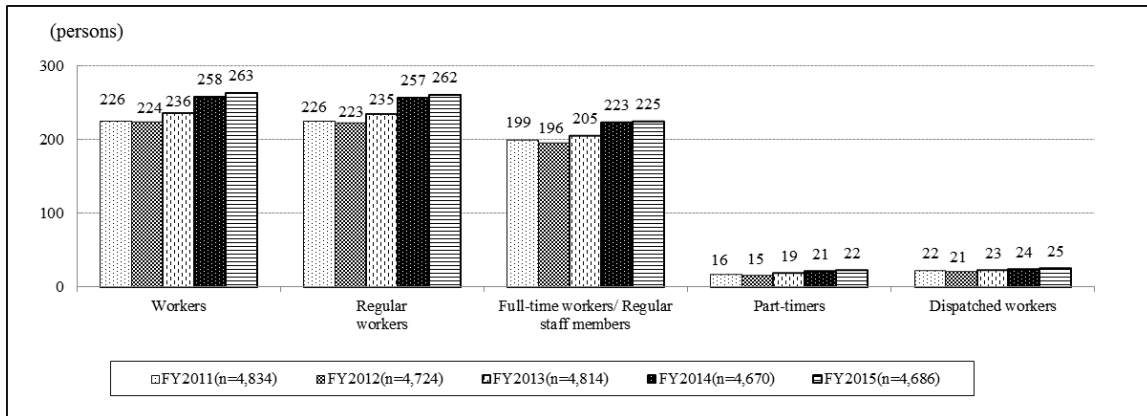
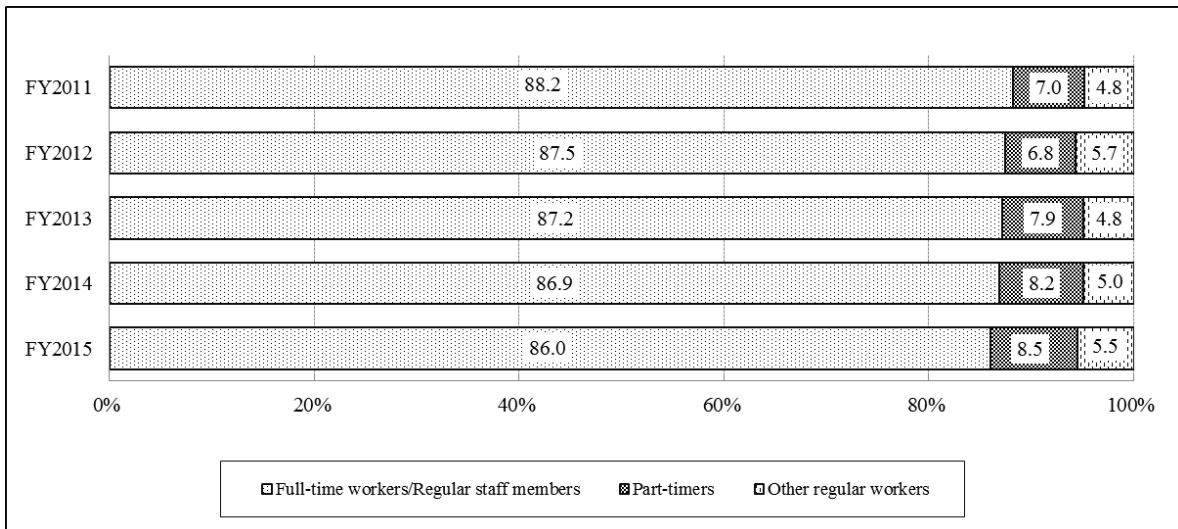


Fig. 1-2-14 Composition Ratios of Regular Workers at IC Companies



## 6. Ownership of subsidiaries and affiliated companies

- Among the 4,686 information and communication companies, the number of those which own subsidiaries<sup>(Note)</sup> was 1,431 (up 1.7%), of which 1,256 companies (up 1.8%) own domestic subsidiaries and 449 (up 4.4%) own overseas subsidiaries.
- The number of subsidiaries was 6,762 (up 6.2%), of which the number of domestic subsidiaries was 4,845 (up 7.2%) and the number of overseas subsidiaries was 1,917 (up 3.7%).

(Note) Subsidiaries include affiliated companies.

(Note) An affiliated company is one in which a certain company directly owns no less than 20% but no more than 50% of the voting rights. It also includes a company in which a certain company commands important influence, even in the case it owns no less than 15% but less than 20% of the voting right.

Fig. 1-2-15 Ownership of Subsidiaries by IC Companies

	Number of companies owning subsidiaries			Ratio of companies owning subsidiaries (%)		Number of subsidiaries			Number of subsidiaries owned per IC company (Note)	
	FY2014 (n=4,670)	FY2015 (n=4,686)	Year-on-year	FY2014	FY2015	FY2014	FY2015	Year-on-year	FY2014	FY2015
	IC companies	1,407	1,431	1.7	30.1	30.5	6,368	6,762	6.2	4.5
Owning domestic subsidiaries	1,234	1,256	1.8	26.4	26.8	4,519	4,845	7.2	3.7	3.9
Owning overseas subsidiaries	430	449	4.4	9.2	9.6	1,849	1,917	3.7	4.3	4.3

(Note) Number of subsidiaries owned per IC company = Number of subsidiaries / Number of companies owning subsidiaries

Number of domestic subsidiaries owned per IC company = Number of domestic subsidiaries / Number of companies owning domestic subsidiaries

Number of overseas subsidiaries owned per IC company = Number of overseas subsidiaries / Number of companies owning overseas subsidiaries

Fig. 1-2-16 Number of IC Companies that Own Subsidiaries

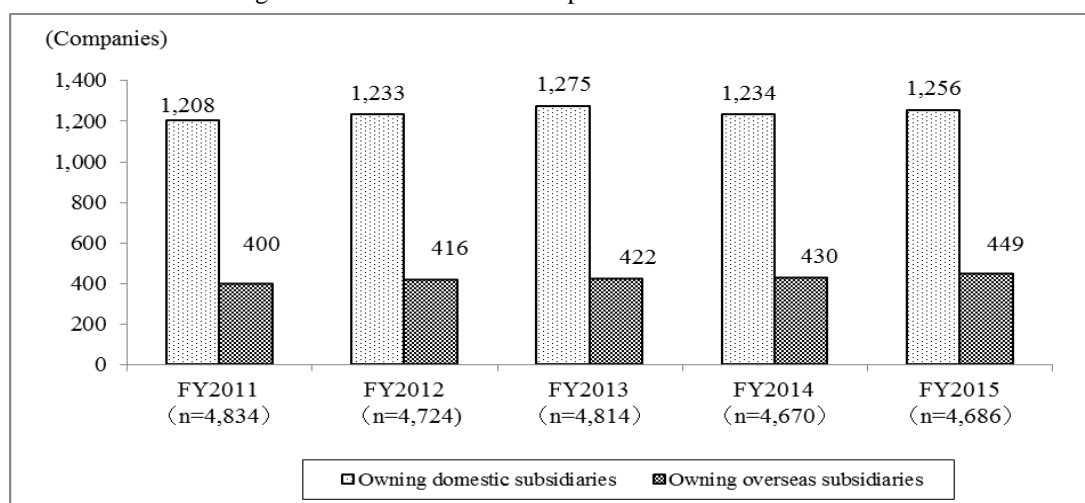
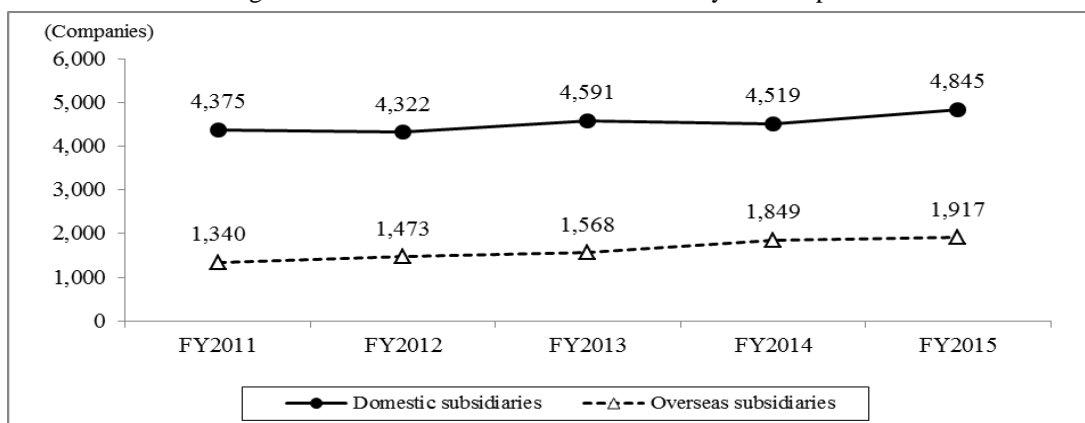


Fig. 1-2-17 Number of Subsidiaries Owned by IC Companies



## 7. Outsourcing

- Looking at the percentages of IC companies implementing outsourcing, 37.3% (down 2.2 points) outsourced their manufacturing work and 68.3% (up 1.5 points) outsourced work other than manufacturing.
- Looking at the percentages of IC companies implementing outsourcing of work other than manufacturing, 67.9% (up 0.7 points) outsourced “Data processing related” work and 35.8% (down 0.2 points) outsourced work in “Specific areas such as tax/accounting”.
- The outsourcing cost per company for manufacturing work was 1.86 billion yen (down 1.8%<sup>(Note 1)</sup>), of which the outsourcing cost to related companies<sup>(Note 2)</sup> was 240 million yen (down 1.5%). The outsourcing cost per company for work other than manufacturing was 1.66 billion yen (down 1.7%), of which the outsourcing cost to related companies was 170 million yen (up 11.0%).

(Note 1) Calculated in 1 million yen units.

(Note 2) Related companies refer to subsidiaries, affiliated companies, and parent companies.

Fig. 1-2-18 Percentages of IC Companies Implementing Outsourcing (Multiple answers allowed)

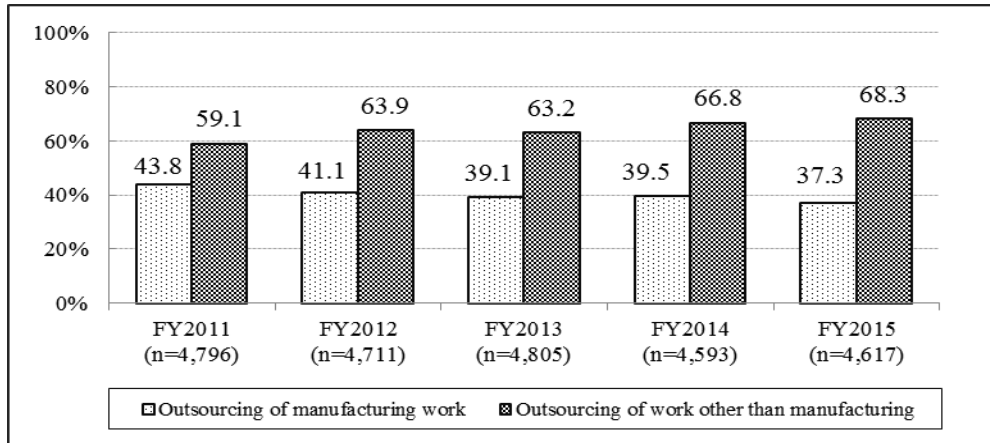


Fig. 1-2-19 Percentages of IC Companies Implementing Outsourcing of Work Other Than Manufacturing (High-ranking) (Multiple answers allowed)

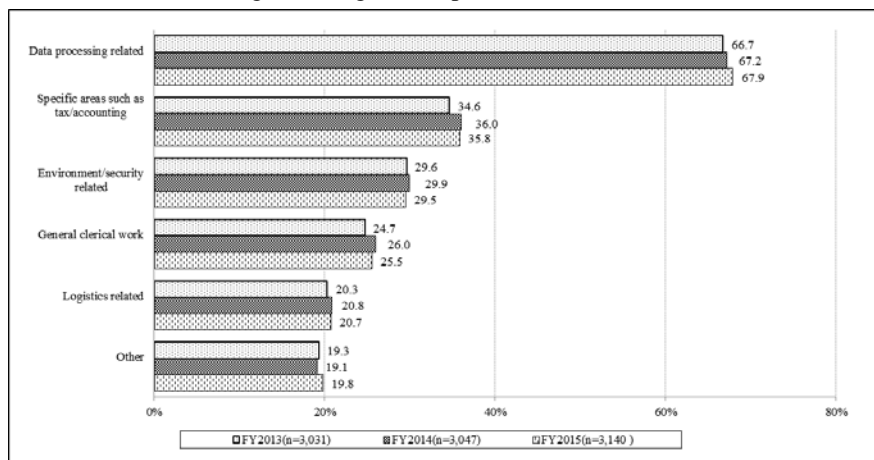
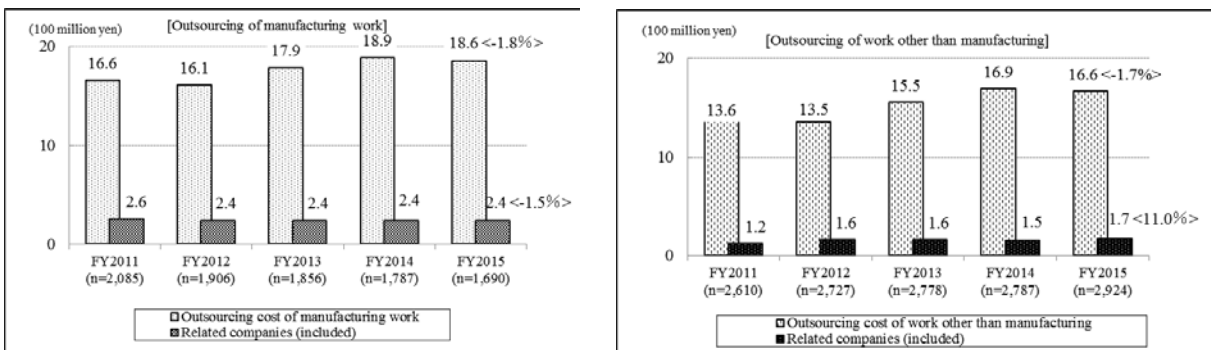


Fig. 1-2-20 Outsourcing Cost per IC Company



## 8. Research and development/ability development

- The percentage of IC companies that conducted research and development (R&D) was 16.9% (down 0.3 points), of which 16.8% (down 0.1 points) conducted R&D domestically and 0.9% (0.0 points difference) conducted R&D overseas.
- The R&D expenses per company were 950 million yen (down 1.9%), of which the in-house R&D expenses were 770 million yen (down 3.1%). The ratio of R&D expenses to sales was 2.5% (down 0.5 points).
- The percentage of IC companies that conducted ability development was 29.9% (up 0.5 points). The ability development expenses per company were 30 million yen (up 27.8%).

Fig. 1-2-21 Percentages of IC Companies that Conducted Research and Development (Multiple answers allowed)

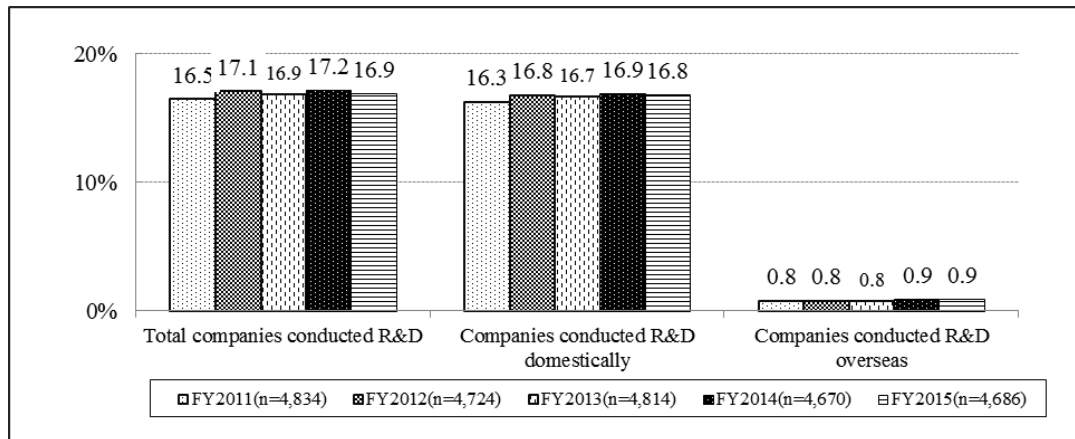
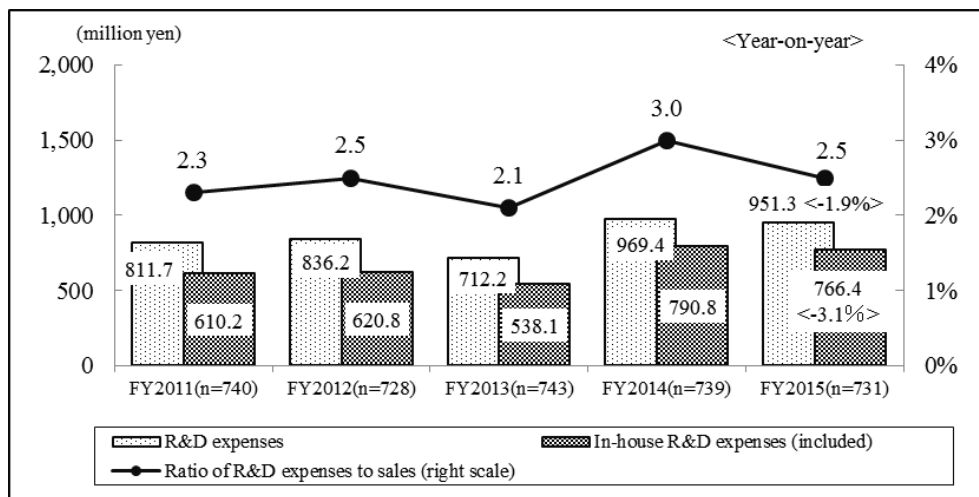


Fig. 1-2-22 R&D Expenses per IC Company



(Notes) R&D expenses = In-house R&D expenses + Outsourced R&D expenses  
Ratio of R&D expenses to sales = R&D expenses / Sales × 100

Fig. 1-2-23 Percentage of IC Companies that Conducted Ability Development

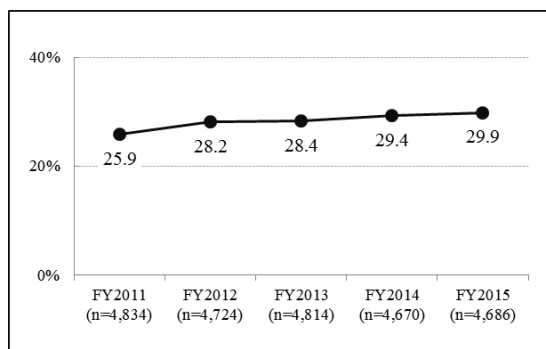
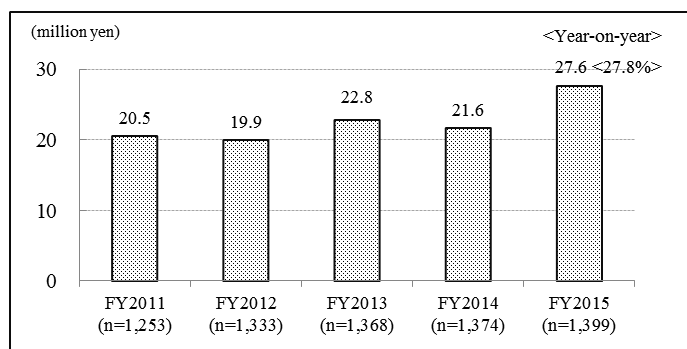


Fig. 1-2-24 Ability Development Expenses per IC Company



(Note) The ability development expenses include teacher/instructor costs, educational material costs, external facility rental fees, training participation fees and training outsourcing expenses, costs related to dispatch to universities or overseas education, financial aid for tuition for overseas education at universities/graduate schools, etc.

## 9. Technology transaction

- The amount received for licensing of domestic technology transaction was 110.45 billion yen and that for overseas technology transaction was 22.21 billion yen. The amount paid for introduction of domestic technology transaction was 152.85 billion yen. The amount paid for introduction of overseas technology transaction was 136.05 billion yen.
- The technology trade balance ratio was 0.16 (up 0.01 points).

Fig. 1-2-25 Amount of Technology Transaction and Technology Trade Balance Ratio of IC companies

	Amount received for licensing of technology (million yen)					Amount paid for introduction of technology (million yen)					Technology trade balance ratio (times)
	Domestic companies		Overseas companies		Domestic / Overseas per company	Domestic companies		Overseas companies		Domestic / Overseas per company	
	Amount received	Amount received per company	Amount received	Amount received per company		Amount paid	Amount paid per company	Amount paid	Amount paid per company		
FY2014	103,761	592.9	24,845	435.9	0.7	124,267	326.2	171,309	1,696.1	5.2	0.15
FY2015	110,449	645.9	22,207	382.9	0.6	152,849	384.0	136,050	1,347.0	3.5	0.16
Year-on-year (%)	6.4	8.9	-10.6	-12.2	-0.1	23.0	17.7	-20.6	-20.6	-1.7	0.01

(Notes) Technology trade balance ratio = Amount received for licensing of technology (overseas) / Amount paid for introduction of technology (overseas)

Year-on-year for the amount received/paid from/to overseas/domestic companies per company and the technology trade balance ratio indicates the differences from the previous fiscal year.

## 10. Direction of corporate management

- The number of directors at IC companies was 25,205, of which 8,288 were outside directors, accounting for 32.9% (up 0.2 points) of all directors.
- 390 companies implemented a stock option system, accounting for 8.3% (down 0.3 points).

Fig. 1-2-26 Directors at IC Companies

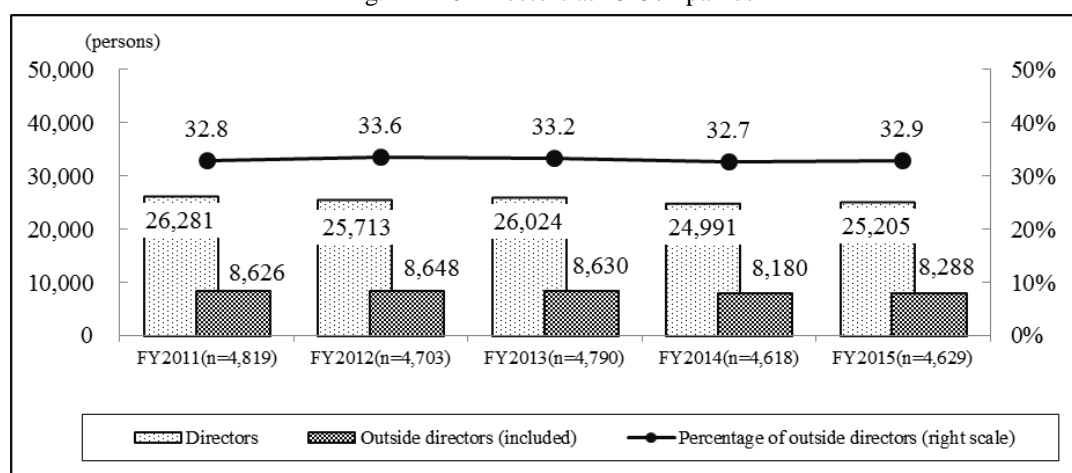
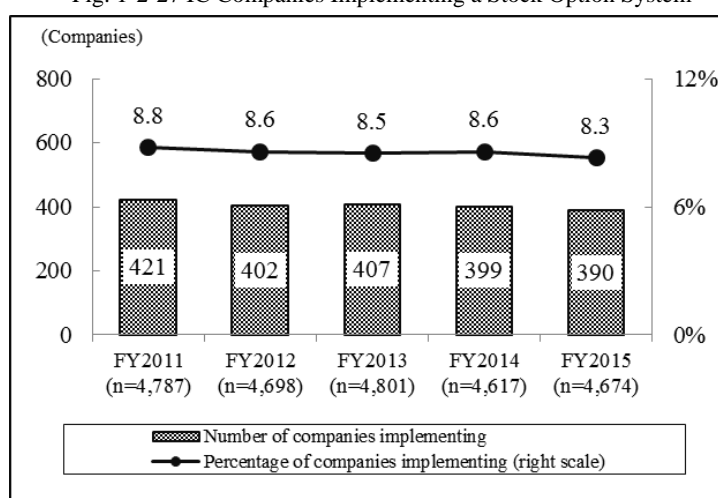


Fig. 1-2-27 IC Companies Implementing a Stock Option System



## Chapter 2 Telecommunications and Broadcasting Business

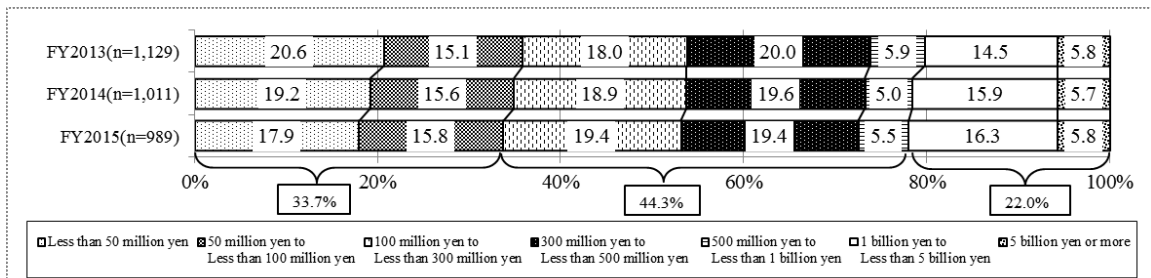
This chapter shows the results of the Survey on Items for Each Business Type (Telecommunications and Broadcasting) based on valid responses from 778 companies (989 companies on a business basis).

### 1. Composition of business operators (by capital and number of workers)

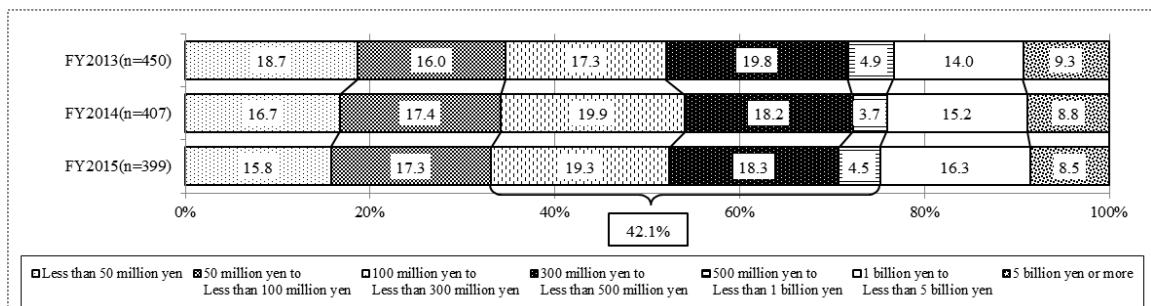
- By capital, in the total telecommunications and broadcasting business, business operators with capital of “100 million yen to less than 1 billion yen” were the largest in number, accounting for 44.3%, followed by those with capital of “Less than 100 million yen”, accounting for 33.7%, and those with capital of “1 billion yen or more”, accounting for 22.0%.
- By business type, business operators with capital of “100 million yen to less than 1 billion yen” accounted for the highest percentage in telecommunications, private broadcasting, and cable television broadcasting (42.1%, 44.3%, and 48.2%, respectively).
- By the number of workers, in the total telecommunications and broadcasting business, business operators with “One to 29 workers” were the majority at approximately 60% (62.9%), followed by those with “30 to 99 workers”, accounting for 20.3%.
- By business type, business operators with “One to 29 workers” accounted for the highest percentage in all business types, accounting for almost 70% (69.8%) in telecommunications. The percentage of business operators with “300 or more workers” was also the highest in telecommunications among these three business types (9.0%).

Fig. 2-1 Composition of Telecommunications and Broadcasting Companies by Capital (Business Basis)

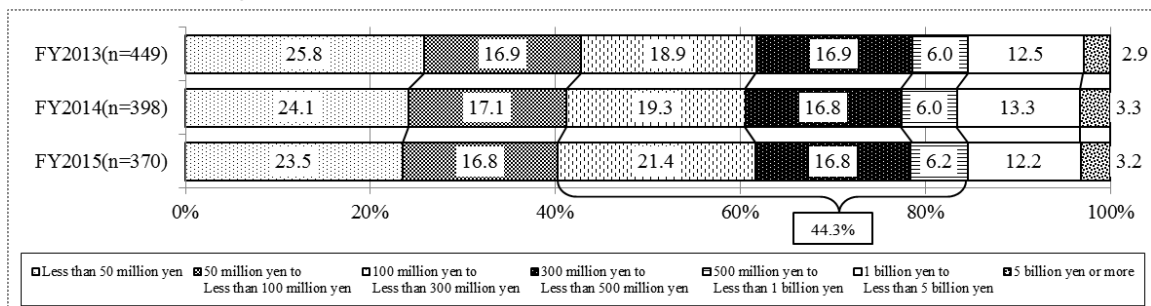
#### [1] Total Telecommunications and Broadcasting Business



#### [2] Telecommunications



#### [3] Private Broadcasting



[4] Cable Television Broadcasting

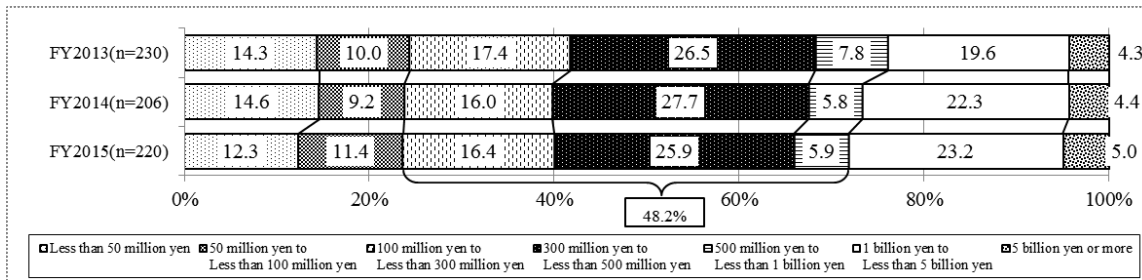
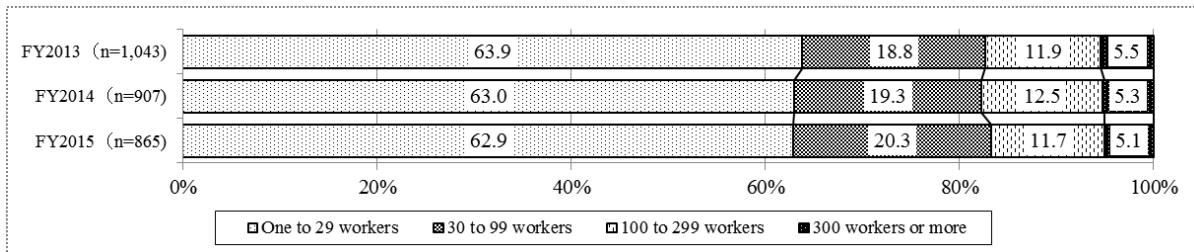
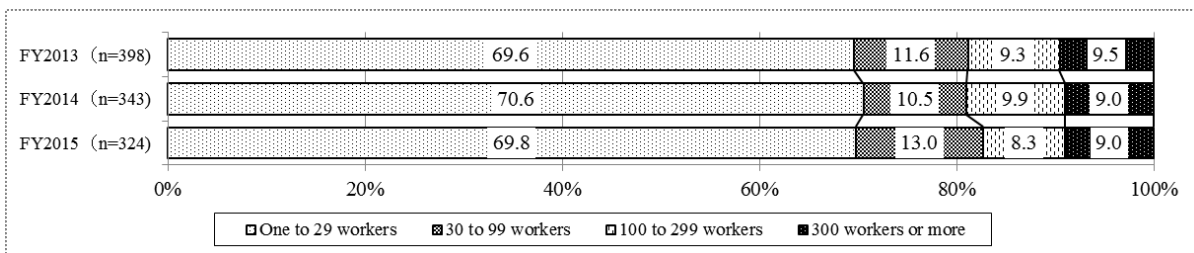


Fig. 2-2 Composition of Telecommunications and Broadcasting Companies by Number of Workers (Business Basis)

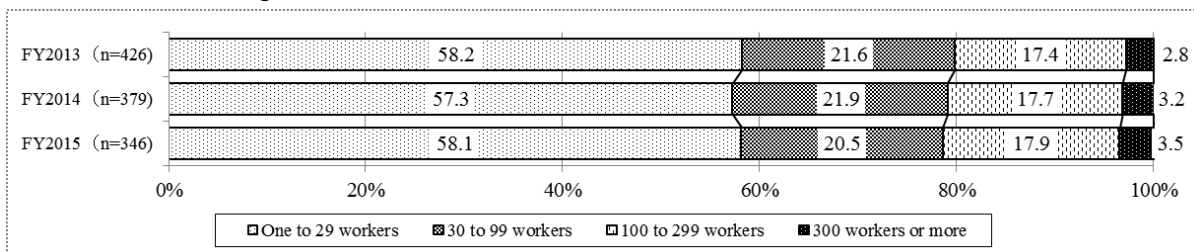
[1] Total Telecommunications and Broadcasting Business



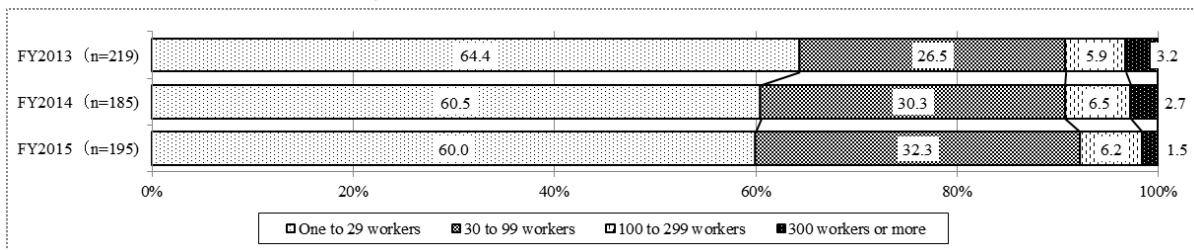
[2] Telecommunications



[3] Private Broadcasting



[4] Cable Television Broadcasting



## 2. Sales

### (1) Sales in the telecommunications and broadcasting business

- The total sales of the telecommunications and broadcasting business in FY2015 (on a business basis) were 17.4918 trillion yen (up 1.5%).
- Sales by companies that responded to the survey for the second consecutive year were 17.3022 trillion yen (up 7.0%).
- Looking at the engagement in side businesses, approximately 90% of companies engaged in the cable television broadcasting business were also engaged in the telecommunications business.

Fig. 2-4 Changes in Sales by Business Type

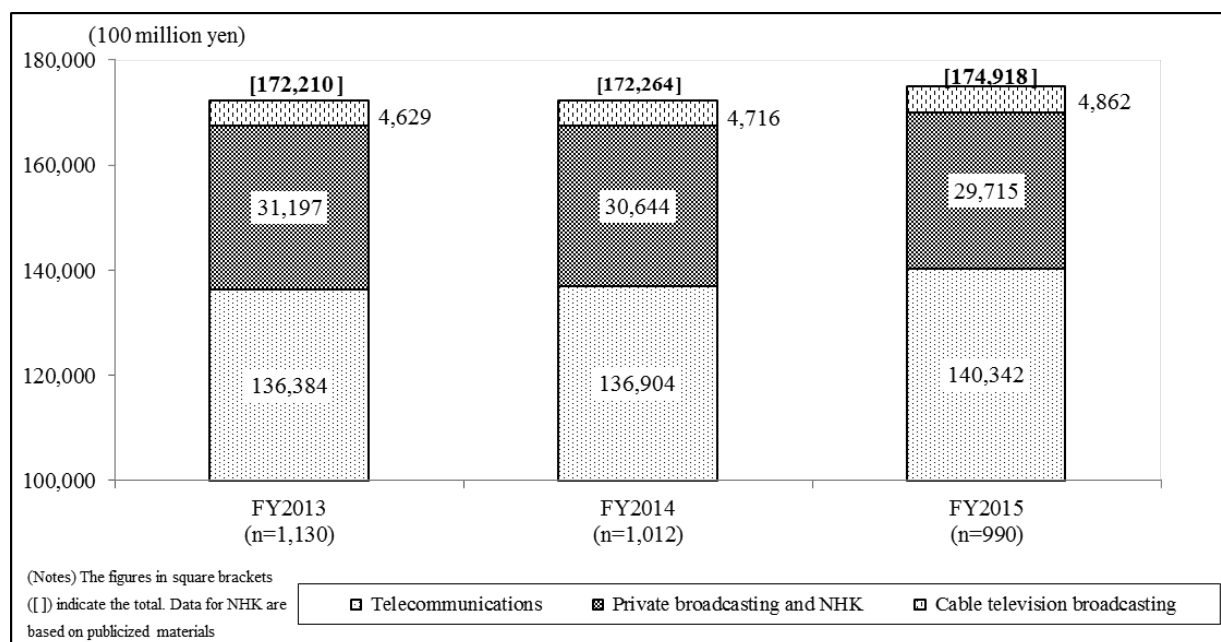


Fig. 2-5 Sales by Business Type of Companies that Responded to the Survey for the Second Consecutive Year

(Unit: companies, 100 million yen, %)

Classification	FY2014		FY2015		Year-on-year (%)
	Number of companies	Sales (Composition ratio)	Number of companies	Sales (Composition ratio)	
Overall	841	161,770 (100.0%)	841	173,022 (100.0%)	7.0
Telecommunications	332	128,592 (79.5%)	332	139,627 (80.7%)	8.6
Broadcasting	509	33,178 (20.5%)	509	33,395 (19.3%)	0.7
Private broadcasting	330	22,115 (13.7%)	330	22,179 (12.8%)	0.3
Cable television broadcasting	178	4,315 (2.7%)	178	4,337 (2.5%)	0.5
NHK	1	6,748 (4.2%)	1	6,879 (4.0%)	1.9

\*Data for NHK are based on publicized materials

Fig. 2-6 Engagement in Side-Businesses

(Unit: companies, 100 million yen)

	Telecommunications		Private broadcasting		Cable television broadcasting	
	Number of companies	Sales	Number of companies	Sales	Number of companies	Sales
(Relevant business)						
Telecommunications	399	140,342				
Private broadcasting			370	22,835		
Cable television broadcasting					220	4,862
(Other businesses)						
Private broadcasting	7	722				
Telecommunications			7	527		
Cable television broadcasting					13	300
Private broadcasting					196	6,464
Cable television broadcasting					13	868

\* "Other businesses" refer to business types other than the relevant one in the telecommunications and broadcasting industry.



(2) Sales in the telecommunications business

- The total sales in the telecommunications business were 14.0342 trillion yen in FY2015.
- Looking at the composition ratio of sales, sound transmission accounted for 29.2% and data transmission accounted for 54.8%. Looking at fixed/mobile communications, mobile communications accounted for more than a half at 54.5%.

Fig. 2-7 Sales in the Telecommunications Business by Service Type

	FY2015		
	Number of companies (Companies)	Sales	
		Amount (100 million yen)	Composition ratio (%)
Sound transmission	144	37,708	26.9
Fixed sound transmission (domestic)	132	15,220	10.8
IP phone (included)	74	4,175	3.0
Fixed sound transmission (international)	12	708	0.5
IP phone (included)	8	2	0.0
Cellular phone or PHS sound transmission	20	21,780	15.5
Data transmission	256	70,932	50.5
Fixed data transmission	249	22,239	15.8
Internet access such as ISP, ADSL, etc. (included)	194	19,343	13.8
Cellular phone or PHS data transmission	14	47,977	34.2
BWA data transmission	7	717	0.5
Dedicated	37	3,425	2.4
International (included)	5	455	0.3
Public wireless LAN	8	21	0.0
IDC			
(Internet Data Center)	49	690	0.5
Other telecommunications services	156	16,584	11.8
Unknown	-	10,981	7.8
(Reproduced) Fixed communications	268	38,166	27.2
Mobile communications	31	70,473	50.2
Total	399	140,342	100.0

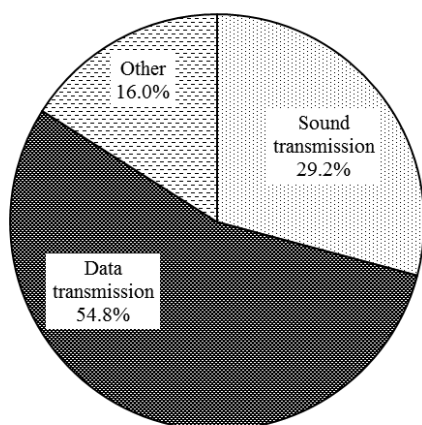
(Notes) "Unknown" indicates the difference between the "Total" and the sum of breakdowns.

"Fixed communications" = "Fixed sound transmission (domestic)" + "Fixed sound transmission (international)" + "Fixed data transmission"

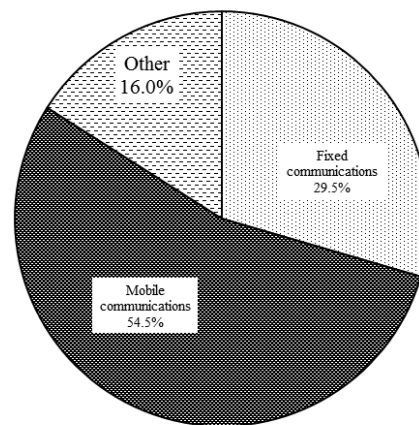
"Mobile communications" = "Cellular phone or PHS sound transmission" + "Cellular phone or PHS data transmission" + "BWA data transmission"

Fig. 2-8 Breakdown of Sales in the Telecommunications Business

[1] By Sound/Data Transmission



[2] By Fixed/Mobile Communications



(Note) Calculated by excluding the sales of the "Unknown" category.

(3) Sales in the broadcasting business

- The total sales in the private broadcasting business were 2.2835 trillion yen (down 4.4%) in FY2015. By service type, sales were 1.7483 trillion yen (down 3.8%) for terrestrial television broadcasting services and 354.7 billion yen (down 0.6%) for satellite broadcasting services (total of BS and CS).
- The total sales in the cable television broadcasting business were 486.2 billion yen (up 3.1%) in FY2015. By service type, sales were 332.3 billion yen (down 0.2%) for basic services and 24.9 billion yen (down 23.2%) for pay services.

Fig. 2-9 Changes in Sales in the Private Broadcasting Business by Service Type

	FY2013			FY2014			FY2015		
	Number of companies	Sales		Number of companies	Sales		Number of companies	Sales	
	(Companies)	Amount (100 million yen)	Composition ratio (%)	(Companies)	Amount (100 million yen)	Composition ratio (%)	(Companies)	Amount (100 million yen)	Composition ratio (%)
Terrestrial television broadcasting	128	18,695	75.9	119	18,169	76.0	106	17,483	76.6
Terrestrial radio broadcasting	284	1,236	5.0	253	1,322	5.5	239	1,146	5.0
Satellite broadcasting (BS)	12	1,374	5.6	16	1,421	5.9	11	1,397	6.1
Satellite broadcasting (110 east longitude CS)	29	702	2.9	25	655	2.7	21	723	3.2
Satellite broadcasting (other CS)	36	1,541	6.3	31	1,492	6.2	23	1,427	6.3
Terrestrial broadcasting (character/data)	4	9	0.0	3	6	0.0	6	6	0.0
Other	89	996	4.0	54	765	3.2	48	614	2.7
Unknown	-	74	0.3	-	65	0.3	-	38	0.2
(Reproduced) Satellite broadcasting	56	3,617	14.7	52	3,568	14.9	43	3,547	15.5
<b>Total</b>	<b>449</b>	<b>24,627</b>	<b>100.0</b>	<b>398</b>	<b>23,896</b>	<b>100.0</b>	<b>370</b>	<b>22,835</b>	<b>100.0</b>

(Notes) The figures for "Satellite broadcasting (other CS)" exclude "Satellite broadcasting (110 east longitude CS)".

"Unknown" indicates the difference between the "Total" and the sum of breakdowns.

Fig. 2-10 Changes in the Breakdown of Sales in the Cable Television Broadcasting Business

	FY2013			FY2014			FY2015		
	Number of companies	Sales		Number of companies	Sales		Number of companies	Sales	
	(Companies)	Amount (100 million yen)	Composition ratio (%)	(Companies)	Amount (100 million yen)	Composition ratio (%)	(Companies)	Amount (100 million yen)	Composition ratio (%)
Basic services	217	3,582	77.4	194	3,331	70.6	198	3,323	68.4
Pay services	174	387	8.4	154	324	6.9	151	249	5.1
Rebroadcasting for those with visual or auditory difficulties	45	62	1.3	39	56	1.2	45	54	1.1
Other	123	534	11.5	120	976	20.7	124	695	14.3
Unknown	-	64	1.4	-	29	0.6	-	542	11.1
<b>Total</b>	<b>230</b>	<b>4,629</b>	<b>100.0</b>	<b>206</b>	<b>4,716</b>	<b>100.0</b>	<b>220</b>	<b>4,862</b>	<b>100.0</b>

(Notes) "Unknown" indicates the difference between the "Total" and the sum of breakdowns.

### 3. Capital investment

- The amount of acquisition and capital investment for the telecommunications and broadcasting business in FY2015 was 1.3713 trillion yen (up 17.2%). By business type, it was 1.1960 trillion yen (up 17.8%) for the telecommunications business, 120.7 billion yen (up 2.3%) for the private broadcasting business, and 54.6 billion yen (up 49.2%) for the cable television broadcasting business.
- The amount of acquisition and capital investment in FY2015 for companies that responded to the survey for the second consecutive year was 997.9 billion yen (down 8.5%).

Fig. 2-11 Changes in the Amount of Acquisition and Capital Investment by Business Type

		Telecommunications/Broadcasting									
		Telecommunications		Broadcasting		Private broadcasting		Cable television broadcasting			
		(Companies)	(100 million yen)	(Companies)	(100 million yen)	(Companies)	(100 million yen)	(Companies)	(100 million yen)	(Companies)	(100 million yen)
Performance in FY2013	Amount of Acquisition and Capital Investment	713	17,794	276	16,033	437	1,761	249	1,056	188	705
	Excluding software	691	15,618	263	14,029	428	1,589	243	953	185	637
	Software	329	2,176	121	2,004	208	172	133	103	75	69
Performance in FY2014	Amount of Acquisition and Capital Investment	608	11,700	235	10,154	373	1,546	213	1,180	160	366
	Excluding software	598	11,075	228	9,653	370	1,423	210	1,071	160	352
	Software	260	624	88	501	172	123	111	109	61	14
Performance in FY2015	Amount of Acquisition and Capital Investment	597	13,713	230	11,960	367	1,753	200	1,207	167	546
	Excluding software	579	12,101	221	10,465	358	1,636	197	1,105	161	531
	Software	282	1,612	109	1,495	173	117	104	102	69	15

Fig. 2-12 Amount of Acquisition and Capital Investment by Business Type (Companies that Responded to the Survey for the Second Consecutive Year)

(Unit: companies, 100 million yen, %)

Classification	Performance in FY2014		Performance in FY2015	
	Number of companies	Capital investment (composition ratio)	Number of companies	Capital investment (composition ratio)
Overall	472	10,906 (100.0)	472	9,979 (100.0)
Telecommunications	174	9,477 (86.9)	174	8,603 (86.2)
Broadcasting	298	1,430 (13.1)	298	1,376 (13.8)
Private broadcasting	164	1,108 (10.2)	164	1,048 (10.5)
Cable television broadcasting	134	321 (2.9)	134	328 (3.3)

### 4. Workers

- The number of workers engaged in the telecommunications and broadcasting business was 126,329 (down 10.3%), out of which 125,168 (down 10.8%) were regular workers.
- The number of workers for companies that responded to the survey for the second consecutive year were 117,949 (up 6.7%).

Fig. 2-13 Number of Workers Engaged in the Telecommunications and Broadcasting Business by Business Type and Employment Type

(Unit: companies, persons)

	Telecommunications/Broadcasting									
	Telecommunications		Broadcasting		Private broadcasting		Cable television broadcasting			
	FY2014	FY2015	FY2014	FY2015	FY2014	FY2015	FY2014	FY2015	FY2014	FY2015
Number of companies	907	865	343	324	564	541	379	346	185	195
Number of workers	140,836	126,329	104,890	92,673	35,946	33,656	26,212	24,785	9,734	8,871
Number of regular workers	140,319	125,168	104,764	91,874	35,555	33,294	25,878	24,437	9,677	8,857
Full-time worker/Regular staff member	89,468	101,030	59,663	73,562	29,805	27,468	21,542	20,113	8,263	7,355
Part-timers	6,497	6,639	4,519	4,390	1,978	2,249	1,333	1,556	645	693
Workers transferred to other companies	19,261	13,151	18,277	12,185	984	966	767	861	217	105
Temporary or daily workers	517	1,161	126	799	391	362	334	348	57	14
Dispatched workers	18,095	18,580	12,308	12,813	5,787	5,767	4,662	4,469	1,125	1,298
Number of workers per company	155	146	306	286	64	62	69	72	53	45

Fig. 2-14 Number of Workers Engaged in the Telecommunications and Broadcasting Business by Business Type and Employment Type (Companies that Responded to the Survey for the Second Consecutive Year)

(Unit: companies, persons)

	Telecommunications/ Broadcasting		Telecommunications		Broadcasting		Private broadcasting		Cable television broadcasting	
	FY2014	FY2015	FY2014	FY2015	FY2014	FY2015	FY2014	FY2015	FY2014	FY2015
	Number of companies	726	726	264	264	462	462	307	307	155
Number of workers	110,593	117,949	79,573	86,980	31,020	30,969	23,348	23,295	7,672	7,674
Number of regular workers	110,154	116,856	79,449	86,192	30,705	30,664	23,089	23,004	7,616	7,660
Full-time worker/Regular staff member	74,017	93,692	48,063	68,244	25,954	25,448	19,363	19,107	6,591	6,341
Part-timers	5,856	6,155	4,205	4,242	1,651	1,913	1,137	1,301	514	612
Workers transferred to other companies	12,462	12,956	11,666	12,028	796	928	699	824	97	104
Temporary or daily workers	439	1,093	124	788	315	305	259	291	56	14
Dispatched workers	14,419	15,768	9,329	10,490	5,090	5,278	4,236	4,204	854	1,074
Number of workers per company	152	162	301	329	67	67	76	76	49	50

## 5. Outsourcing

- The number of companies engaged in the telecommunications and broadcasting business implementing outsourcing was 491 and the total outsourcing cost was 1.5938 trillion yen, of which the percentage of outsourcing to related companies was 2.7% in telecommunications, while significantly higher at 24.3% and 59.4% in private broadcasting business and cable television broadcasting, respectively.

Fig. 2-15 Outsourcing in the Telecommunications and Broadcasting Business by Business Type

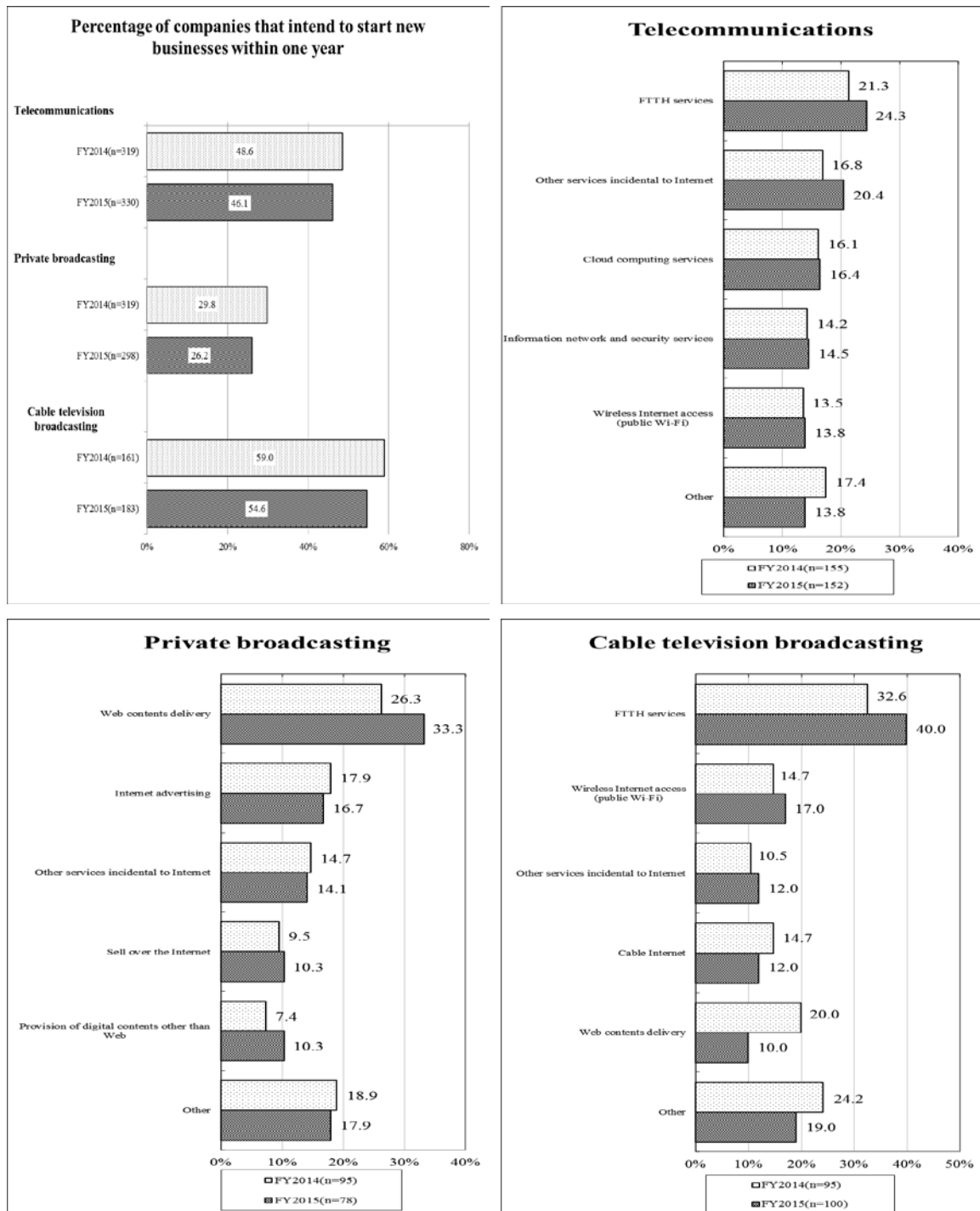
(Unit: companies, 100 million yen)

	Number of companies	Outsourcing cost		Ratio of outsourcing to related companies
			Related companies (included)	
Telecommunications/Broadcasting	491	15,938	1,138	7.1%
Telecommunications	182	13,131	358	2.7%
Broadcasting	309	2,806	780	27.8%
Private broadcasting	207	2,529	615	24.3%
Cable television broadcasting	102	277	164	59.4%

## 6. Future business operation

- The percentage of companies that intend to start new businesses within one year in the telecommunications, private broadcasting, and cable television broadcasting businesses stood at 46.1% (down 2.5 points), 26.2% (down 3.6 points), and 54.6% (down 4.4 points), respectively.
- Regarding new business fields that companies intend to start, the most common answer was “FTTH services” in the telecommunications business and the cable television broadcasting business (24.3% and 40.0%, respectively), and “Web contents delivery services” (33.3%) in the private broadcasting business.

Fig. 2-16 New Businesses that Companies Intend to Start within One Year (High-ranking) (Multiple answers allowed)



(Note) Values represent the ratio of companies that responded that they were intending to start new businesses within one year.

## Chapter 3 Broadcast Program Production Business

This Chapter shows the results of the Survey on Items for Each Business Type (Broadcast Program Production) based on valid responses from 372 companies.

### 1. Composition of businesses (by capital, number of workers, and sales)

- By capital and number of workers, business operators with capital of less than 50 million yen accounted for 61.3% (up 5.2 points) of the total and business operators with less than 100 workers accounted for 90.2% (down 0.1 points), thus indicating that most of the business operators engaged in this business were small and medium-sized.
- By sales, business operators with sales of “Less than 50 million yen” were the largest in number, accounting for 32.0% (up 1.6 points), followed by those with sales of “100 million yen to less than 300 million yen” (24.2% (up 3.7 points)) and those with sales of “1 billion yen or more” (17.2% (down 1.8 points)).

Fig. 3-1 Composition of Broadcast Program Production Companies by Capital

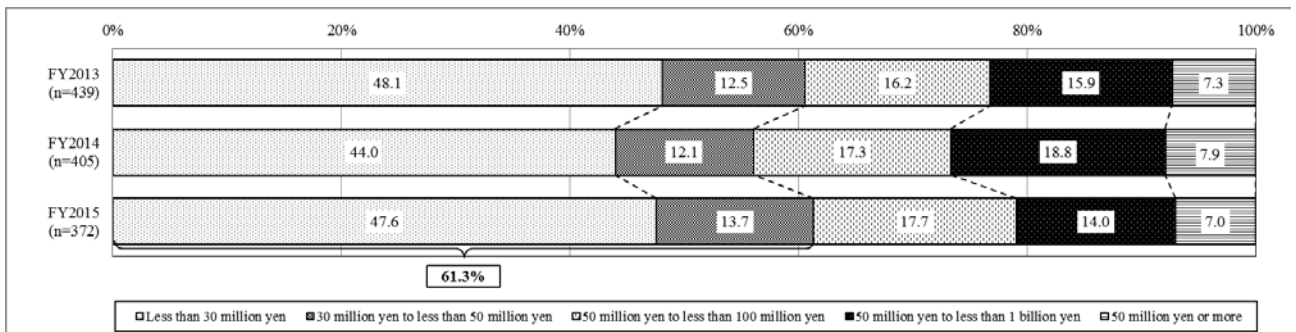


Fig. 3-2 Composition of Broadcast Program Production Companies by Number of Workers

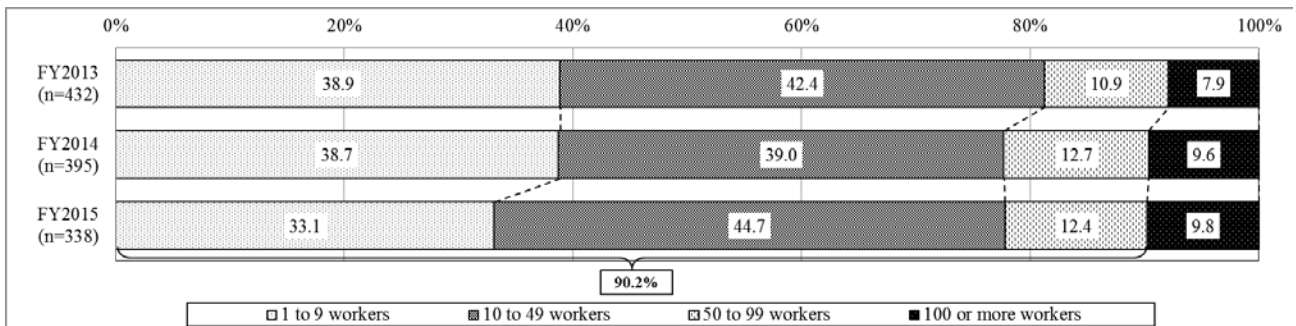
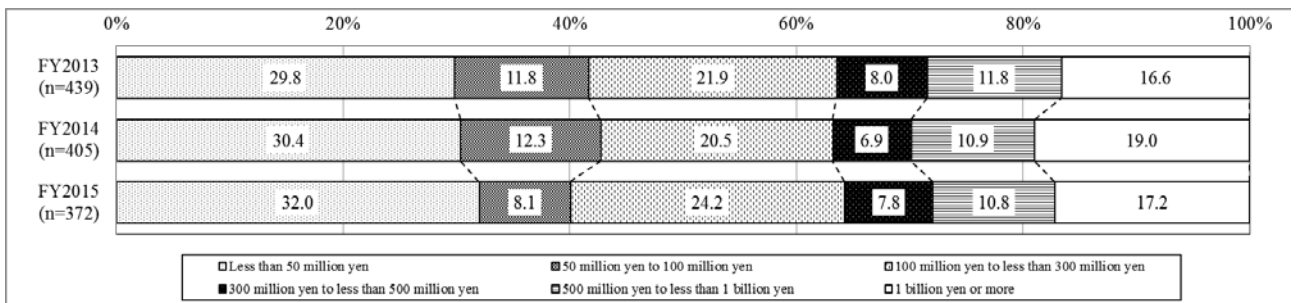


Fig. 3-3 Composition of Broadcast Program Production Companies by Sales



## 2. Sales

- Sales of the broadcast program production business in FY2015 were 307.0 billion yen (down 27.8%). The sales per company were 830 million yen (down 21.4%).
- Looking at sales of companies that responded to the survey for the second consecutive year, the amount decreased from 232.6 billion yen in FY2014 to 222.9 billion yen in FY2015 (down 4.2%).
- By capital, the sales per company with capital of “Less than 50 million yen” were 430 million yen (up 7.7%) and that with capital of “50 million yen or more” were 1.46 billion yen (down 22.7%).

Fig. 3-4 Changes in Sales of the Broadcast Program Production Business

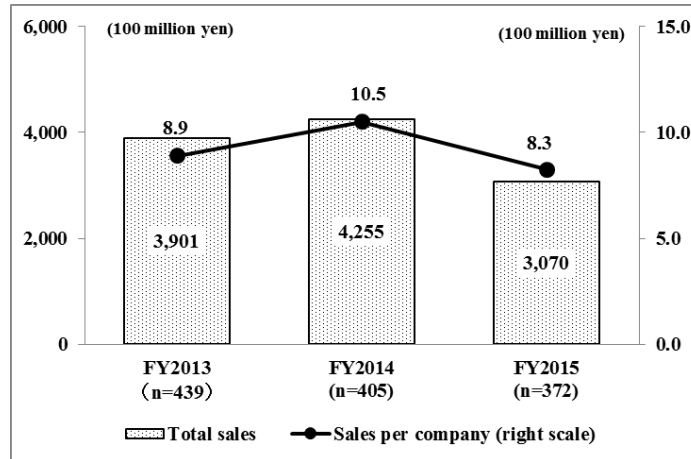


Fig. 3-5 Changes in Sales of Companies that Responded to the Survey for the Second Consecutive Year

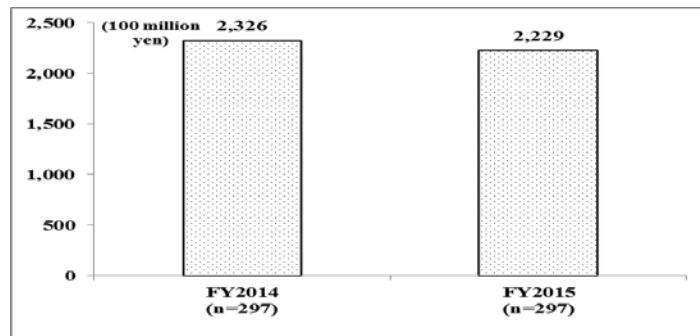
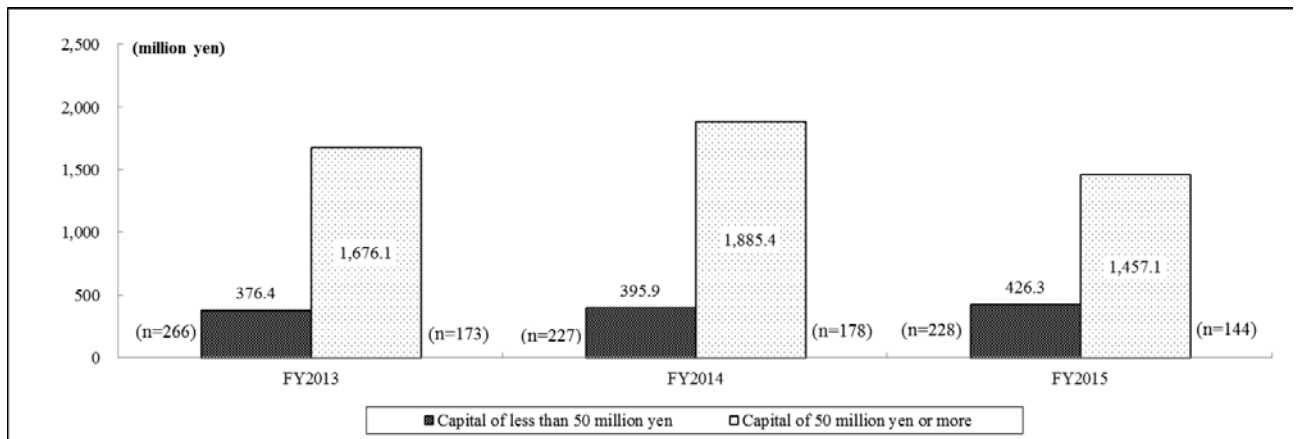


Fig. 3-6 Changes in Sales per Company Engaged in the Broadcast Program Production Business by Capital



### 3. Content of work

- By type of broadcast program, “Information program (including publicity)” accounted for the highest percentage at 68.3% (down 4.0 points), followed by “CM” (60.2% (down 5.5 points)) and “Variety” (44.1% (up 2.4 points)).
- By type of broadcast program production work, “Planning” accounted for the highest percentage at 82.3% (down 6.1 points), followed by “Editing” (74.7% (down 8.3 points)).
- By type of work other than broadcast program production, “Company publicity/video production” accounted for the highest percentage at 69.9% (down 1.7 points), followed by “DVD production” at 56.7% (up 0.5 points)).

Fig. 3-7 Percentage of Types of Broadcast Programs Produced (Multiple answers allowed)

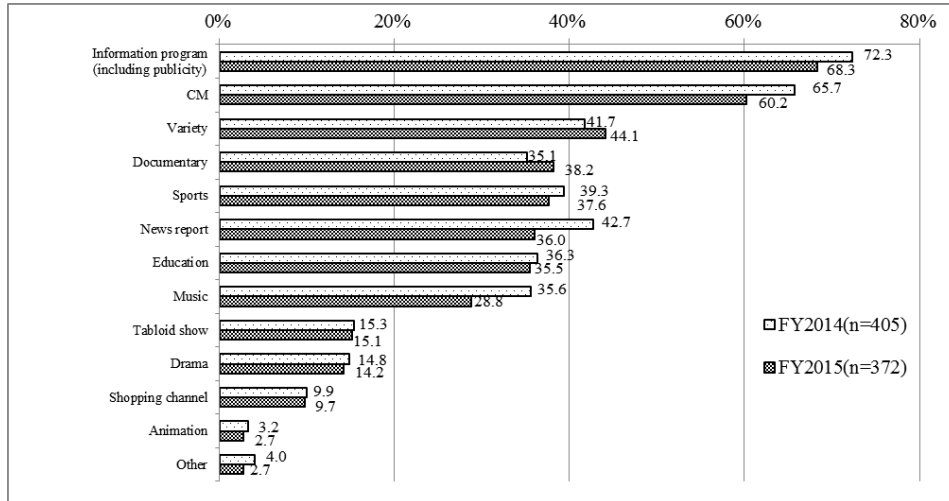


Fig. 3-8 Content of Broadcast Program Production Work (Multiple answers allowed)

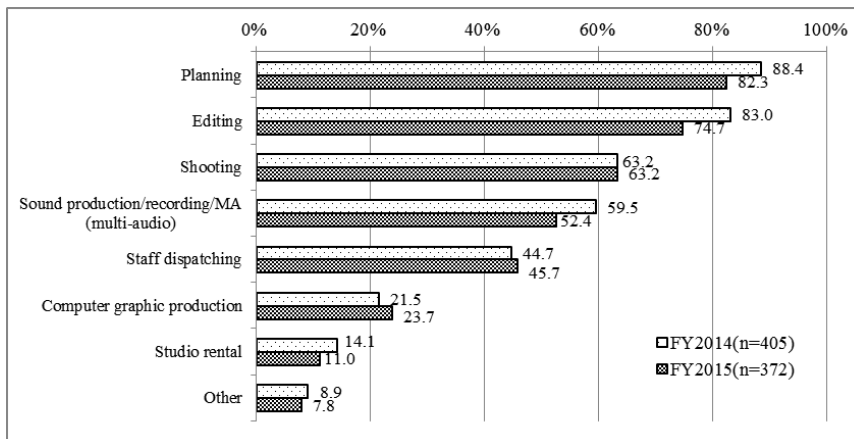
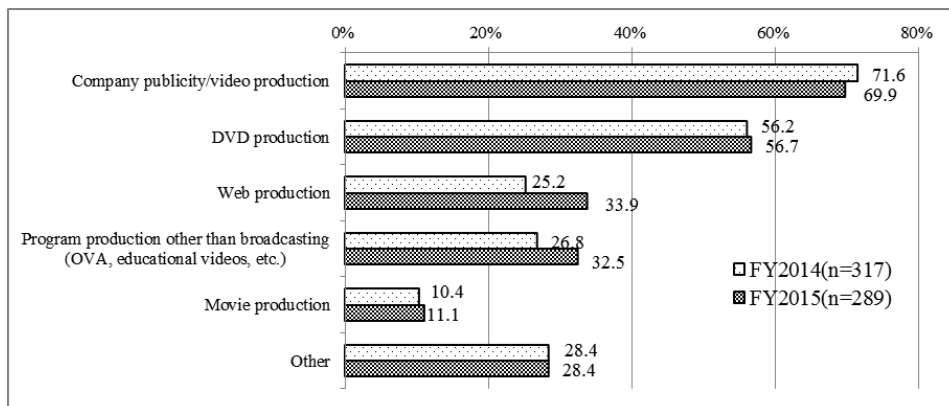


Fig. 3-9 Content of Work Other Than Broadcast Program Production (Multiple answers allowed)





#### 4. Capital investment

##### (1) Changes in the amount of capital investment and the ratios of capital investment to sales

- The amount of capital investment per company engaged in the broadcast program production business in FY2015 was 52.4 million yen (down 17.0%).
- The ratio of capital investment to sales of companies that provided valid answers to both sales and capital investment in FY2015 was 3.8% (up 0.3 points).

Fig. 3-10 Changes in the Amount of Capital Investment per Company Engaged in the Broadcast Program Production Business

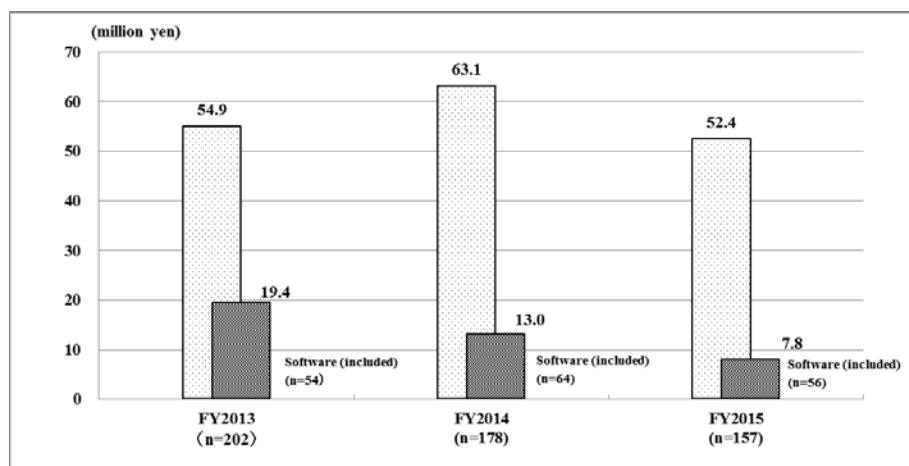


Fig. 3-11 Ratios of Capital Investment to Sales in the Broadcast Program Production Business

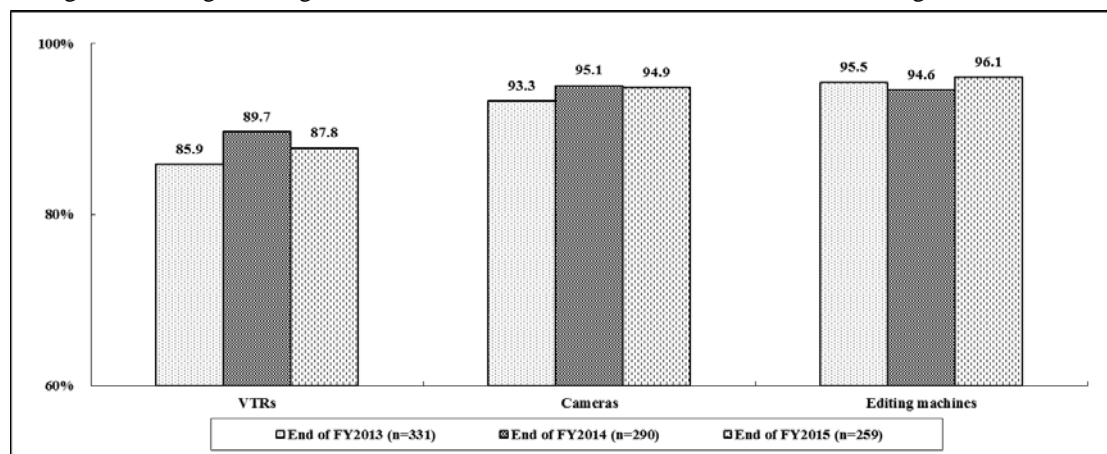
	Number of companies (companies)	Sales (million yen)	Sales per company (million yen)	Amount of acquisitions and capital investments (million yen)	Amount of acquisitions and capital investment per company (million yen)	Ratios of capital investment to sales (%)	(Special tabulation) Companies that responded to the survey for the second consecutive year		
							Sales per company (million yen)	Amount of acquisitions and capital investments per company (million yen)	Ratios of capital investment to sales (%)
FY2014 performance	178	315,708	1,773.6	11,236	63.1	3.6	1,256.5	45.1	3.6
FY2015 performance	157	214,227	1,364.5	8,229	52.4	3.8	1,277.5	50.7	4.0
Year-on-year (%) / Gap (points)	-11.8	-32.1	-23.1	-26.8	-17.0	0.3pt	1.7	12.5	0.4pt

\* Companies that provided valid answers to both sales and capital investment were tabulated.

##### (2) Digitalization of instruments

- Looking at the digitalization of instruments used for broadcast program production, 87.8% of VTRs (down 1.9 points), 94.9% of cameras (down 0.2 points), and 96.1% of editing machines (up 1.5 points) were digitalized.

Fig. 3-12 Changes in Digitalization Ratios of Instruments Used for Broadcast Program Production



## 5. Workers

- The number of workers engaged in the broadcast program production business was 14,298 (down 0.7%), of which 13,872 (down 2.5%) were regular workers and 426 were temporary or daily workers.
- The number of full-time workers per company increased from the previous fiscal year to 31.8.
- The number of workers for companies that responded to the survey for the second consecutive year decreased from the previous fiscal year (down 3.0%).

Fig. 3-13 Number of Workers Engaged in the Broadcast Program Production Business

(Unit: 1 person, %)

Employment status	End of FY2013 (n=432)			End of FY2014 (n=395)			End of FY2015 (n=338)		
	Number of workers	Per company	Composition ratio	Number of workers	Per company	Composition ratio	Number of workers	Per company	Composition ratio
Total workers	14,491	33.5	100.0	14,397	36.4	100.0	14,298	42.3	100.0
Regular workers	14,270	33.0	98.5	14,230	36.0	98.8	13,872	41.0	97.0
Full-time workers/Regular staff members	11,677	27.0	80.6	11,252	28.5	78.2	10,743	31.8	75.1
Part-timers	940	2.2	6.5	912	2.3	6.3	1,141	3.4	8.0
Workers transferred to other companies	253	0.6	1.7	319	0.8	2.2	397	1.2	2.8
Other regular workers	1,400	3.2	9.7	1,747	4.4	12.1	1,591	4.7	11.1
Temporary or daily workers	221	0.5	1.5	167	0.4	1.2	426	1.3	3.0
Dispatched workers	723	1.7	-	871	2.2	-	1,056	3.1	-

Fig. 3-14 Changes in the Number of Workers for Companies that Responded to the Survey for the Second Consecutive Year

(Unit: 1 company, 1 person)

	Number of companies	Total workers	Regular workers				Temporary or daily workers	Dispatched workers
			Regular workers	Full-time workers/Regular staff members	Part-timers	Workers transferred to other companies		
End of FY2014	264	10,222	10,087	7,888	585	264	135	423
End of FY2015	264	9,919	9,685	7,855	462	258	234	475
Year-on-year (%)	-	-3.0	-4.0	-0.4	-21.0	-2.3	73.3	12.3

## 6. Contracts

- By type of contract for TV program production, “Planning brought from broadcasting stations” accounted for 44.1% (up 0.8 points) and “Planning brought in-house” accounted for 31.3% (down 1.3 points).
- Orders were placed by written contracts in 73.3% (down 6.8 points) of the contracts for TV program production.
- By the number of television broadcast programs (excluding CMs) delivered as “Complete packages”, “10 pieces to less than 50 pieces” accounted for the highest percentage at 37.1% (up 10.3 points).

Fig. 3-15 Types of Contracts for TV Program Production

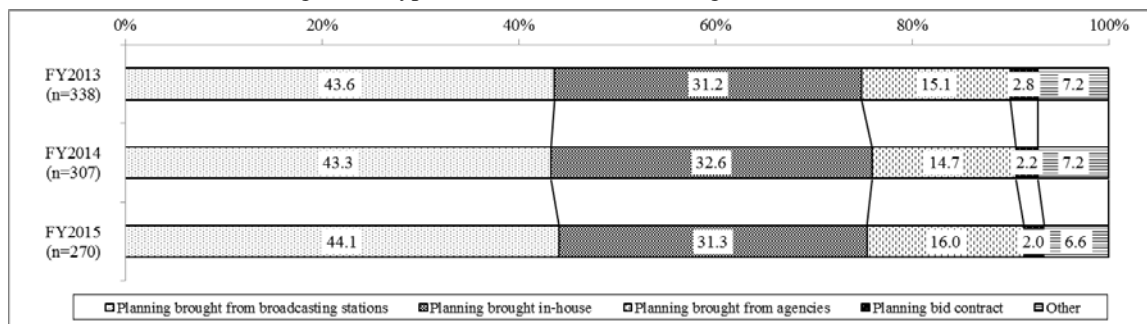
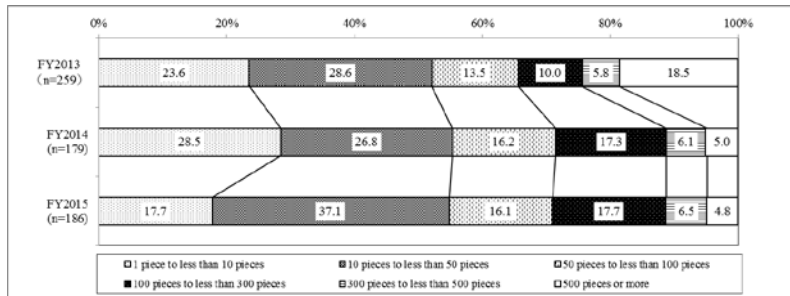


Fig. 3-16 Number of Contracts for TV Program Production and Percentage of Written Contracts

Fiscal year	Number of companies	Total number of contracts	Ordered by written contracts (included)	Percentage of written contracts (%)
FY2013	296	57,346	45,445	79.2
FY2014	254	56,989	45,660	80.1
FY2015	240	40,099	29,378	73.3

Fig. 3-17 Composition of Companies (By the number of television broadcast programs delivered as “Complete packages”) (Excluding companies that did not answer)



(Note) “Complete packages” refers to programs for which recording/editing is completed and that are ready to be broadcast.

### 7. Secondary use of television broadcast programs

- Of television broadcast programs produced and delivered as “Complete packages” in FY2015, secondary use was carried out for 70.5% (down 13.5 points).
- By specific type of secondary use by broadcast program production company, “Rebroadcasting the program” accounted for the highest percentage at 71.0% (down 1.3 points).

Fig. 3-18 Secondary Usage of Television Broadcast Programs

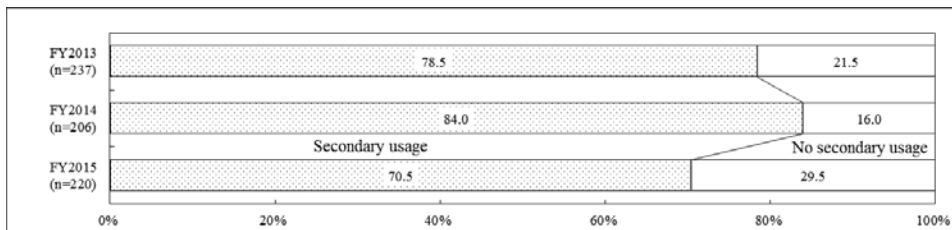
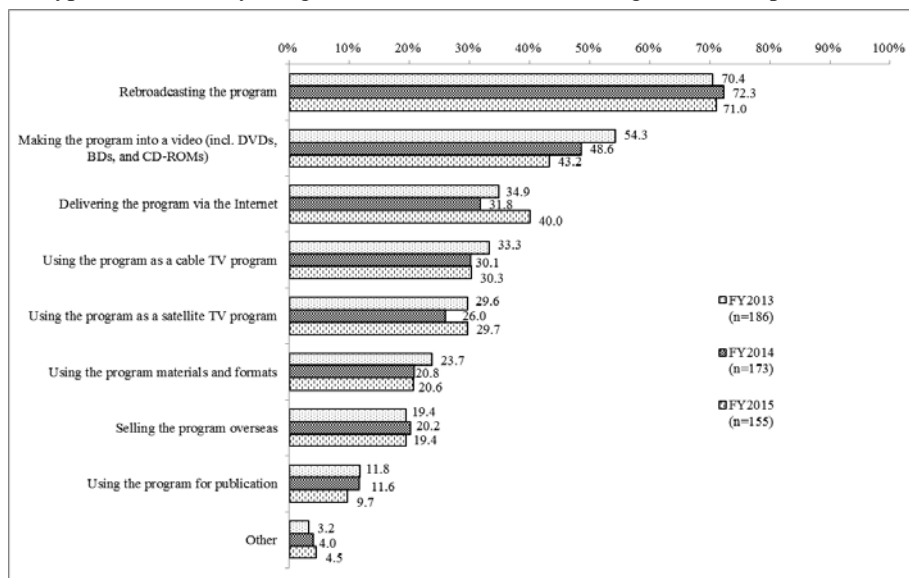


Fig. 3-19 Types of Secondary Usage of Television Broadcast Programs (Multiple answers allowed)



## 8. Outsourcing

- The number of companies in the broadcast program production business that provided an answer regarding outsourcing costs was 147 and the total outsourcing cost was 59.7 billion yen.

Fig. 3-20 Outsourcing in the Broadcast Program Production Business

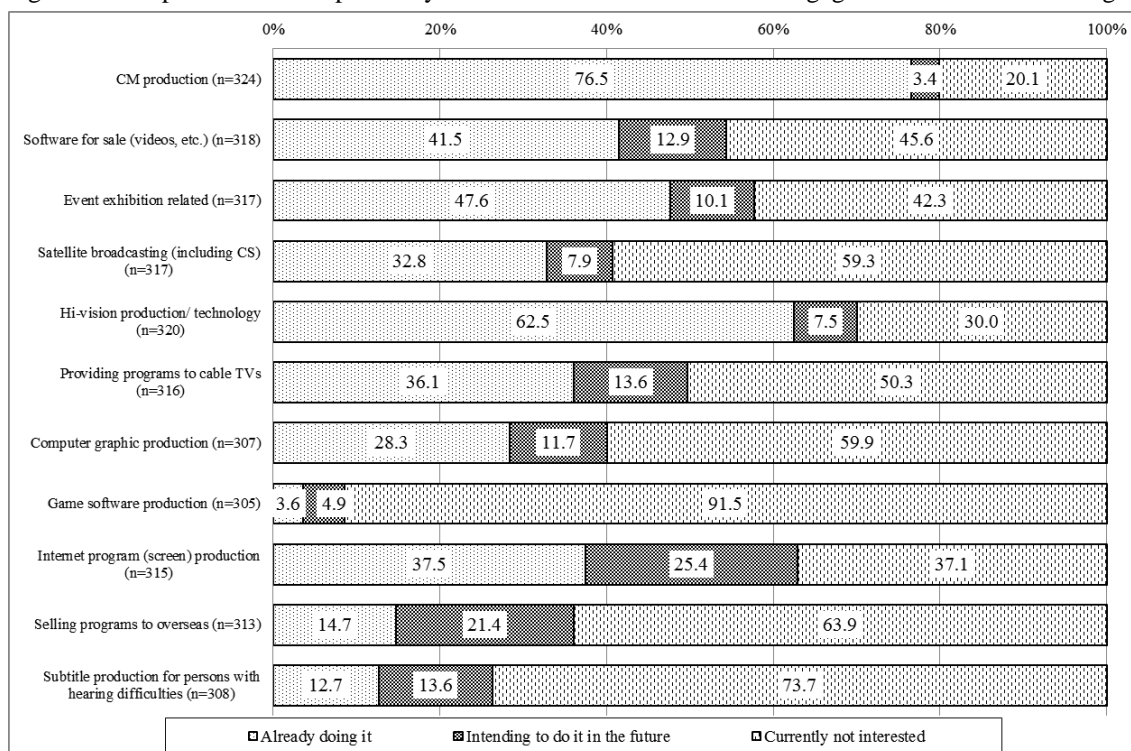
(Unit: 1 company, 1 million yen)

	Number of companies	Outsourcing cost	
			Related companies (included)
[Capital]	147	59,736	12,473
Less than 10 million yen	3	329	-
10 million yen to less than 30 million yen	44	4,368	227
30 million yen to less than 50 million yen	20	6,160	1,288
50 million yen to less than 100 million yen	28	8,139	3,526
100 million yen to less than 300 million yen	12	18,599	2,871
300 million yen to less than 500 million yen	19	8,727	2,606
500 million yen or more	21	13,414	1,955

## 9. Future business development

- Looking at the future business development of broadcast program production companies, those intending to newly engage in “Internet program (screen) production” accounted for the highest percentage (25.4%).

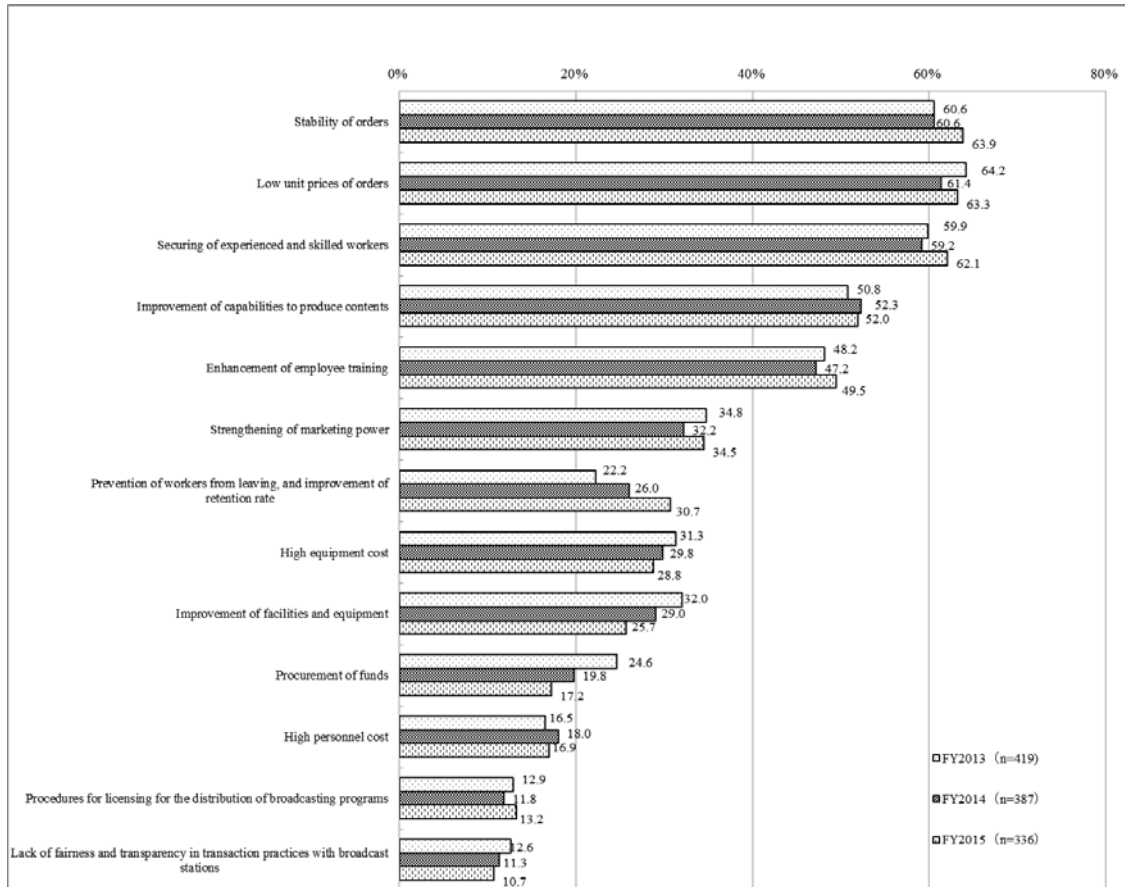
Fig. 3-21 Composition of Companies by Content of Work and Status of Engagement in New Technologies



## 10. Management problems

- As for management problems in the broadcast program production business, “Stability of orders” accounted for the highest percentage at 63.9% (up 3.3 points), followed by “Low unit prices of orders” (63.3% (up 1.9 points)).

Fig. 3-22 Management Problems in the Broadcast Program Production Business (Multiple answers allowed)



## Chapter 4 Business of Services Incidental to Internet

This chapter shows the results of the Survey on Items for Each Business Type (Services Incidental to Internet) based on valid responses from 545 companies.

### 1. Number of companies and sales

- The total sales of the services-incidental-to-internet business in FY2015 were 2.3954 trillion yen (up 26.7%), the largest since the start of the survey.
- The sales per company were 4.40 billion yen (up 25.5%). Sales increased mainly in information network security services (up 30.1%) and Web contents delivery services (up 23.0%).
- Looking at companies that provided the percentage of their advertising revenue to sales by service type, the percentage was the highest for web information search services at 94.8% (up 8.3 points), followed by BBS/blog service/SNS operation, shopping site operation, and then auction site operation.

Fig. 4-1 Number of Companies and Sales by Service Type (Based on Companies' Activities)

	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2014	FY2015	Year-on-year (%)	FY2014	FY2015	Year-on-year (%)	FY2014	FY2015	Year-on-year (%)
Total	540	545	0.9	1,890,639	2,395,436	26.7	3,501.2	4,395.3	25.5
Web information search services	74	69	-6.8	119,946	121,612	1.4	1,620.9	1,762.5	8.7
Shopping site operation and auction site operation	76	77	1.3	226,029	265,783	17.6	2,974.1	3,451.7	16.1
Electronic bulletin board services, blog services, and SNS operation	19	21	10.5	134,076	28,919	-78.4	7,056.6	1,377.1	-80.5
Web contents delivery services	147	143	-2.7	672,160	804,291	19.7	4,572.5	5,624.4	23.0
Revenue from IPTV services	17	16	-5.9	60,917	63,142	3.7	3,583.4	3,946.4	10.1
Cloud computing services	139	132	-5.0	74,368	77,718	4.5	535.0	588.8	10.1
Electronic authentication services	8	11	37.5	4,667	6,746	44.5	583.4	613.3	5.1
Information network security services	69	72	4.3	73,233	99,394	35.7	1,061.3	1,380.5	30.1
Charging/settlement agent services	23	26	13.0	61,469	80,343	30.7	2,672.6	3,090.1	15.6
Server management consignment	95	86	-9.5	47,384	49,911	5.3	498.8	580.4	16.4
Other services incidental to Internet	141	144	2.1	469,343	847,679	80.6	3,328.7	5,886.7	76.8
(Special tabulation) Companies that responded to the survey for the second consecutive year	446	446	-	1,735,870	2,163,518	24.6	3,892.1	4,850.9	24.6

(Notes) As some companies operate multiple services businesses, the total number of companies does not necessarily match the sum of the breakdown figures.

As some companies do not provide data on the breakdown of sales, the numbers for total sales and the sum of the breakdown do not match.

\*Shopping site operation and auction site operation" refer to Internet shopping site operation and Internet auction site operation businesses. Hereinafter the same shall apply.

Fig. 4-2 Changes in Sales

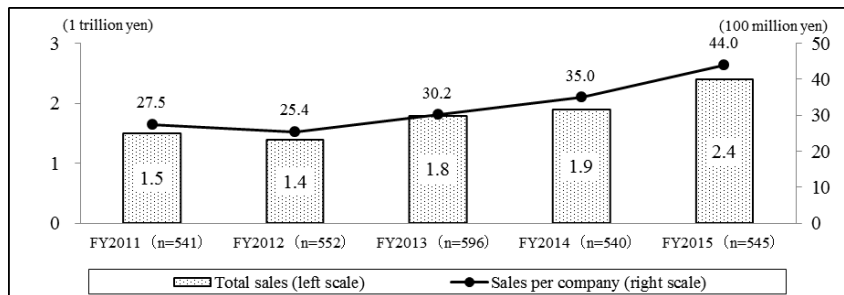


Fig. 4-3 Percentage of Advertising Revenue by Service Type

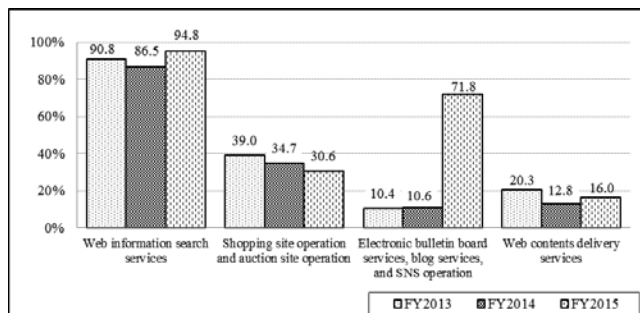
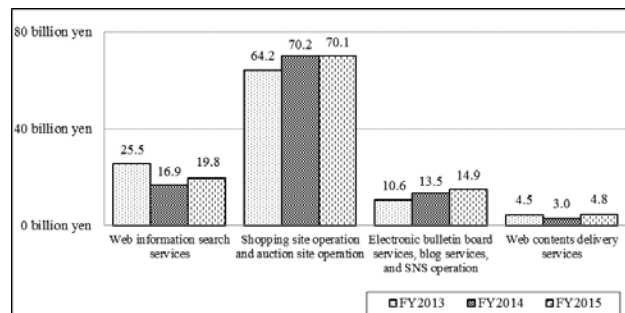


Fig. 4-4 Advertising Revenue per Company by Service type



(Note) Calculated based on the "Sales" and "Advertising revenue" from companies which provided data on the percentage of their advertising revenue.

## 2. Capital investment

- The amount of acquisition and capital investment per company was 460 million yen in FY2015 (up 30.8%). The outlook for the next fiscal year (FY2016) is 280 million yen (up 10.2%).
- The ratio of capital investment to sales was 6.3% in FY2015 (down 0.3 points).

Fig. 4-5 Amount of Acquisition and Capital Investment per Company

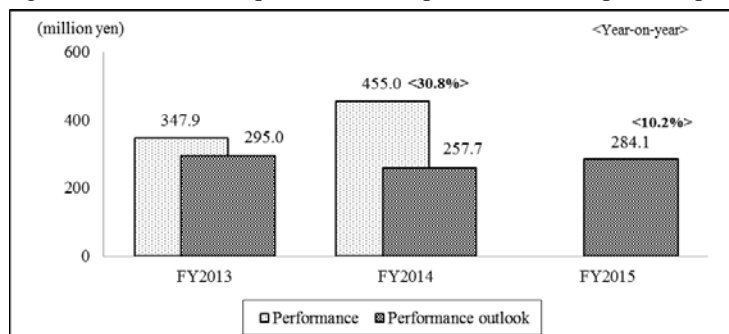


Fig. 4-6 Ratios of Capital Investment to Sales

	Number of companies (companies)	Sales per company (million yen)	Amount of acquisition and capital investment per company (million yen)	Ratios of capital investment to sales (%)	(Special tabulation) Companies that responded to the survey for the second consecutive year	
					Amount of acquisition and capital investment per company (million yen)	Ratios of capital investment to sales (%)
FY2014 performance	305	5,303.6	347.9	6.6	462.3	6.6
FY2015 performance	304	7,227.3	455.0	6.3	590.4	6.7
Year-on-year (%)	-0.3	36.3	30.8	-0.3	27.7	0.1

(Notes) Companies that provided answers to both "Sales" and "Amount of acquisition and capital investment" were subject to tabulation.

Year-on-year comparison for the ratios of capital investment to sales represents the difference from the previous fiscal year.

## 3. Outsourcing

- 57.2% of companies implemented outsourcing (down 1.6 points).
- The outsourcing cost per company was 620 million yen (up 10.7%).

Fig. 4-7 Percentages of Companies Implementing Outsourcing

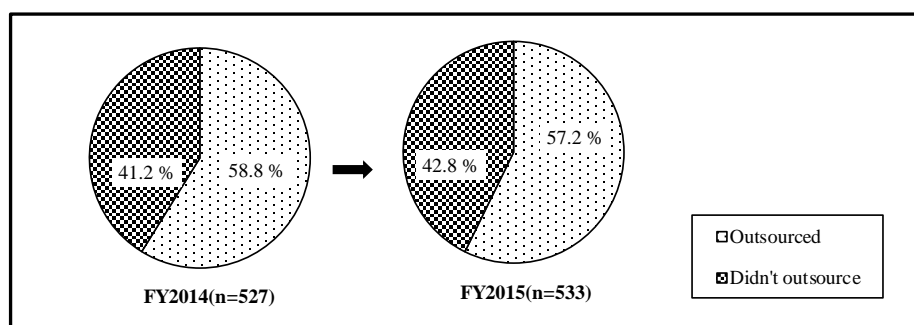
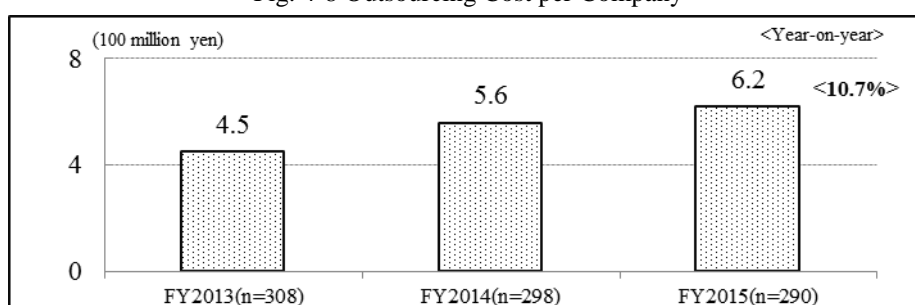


Fig. 4-8 Outsourcing Cost per Company



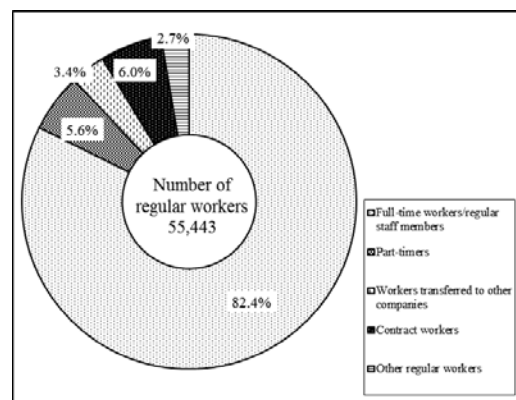
#### 4. Workers

- The number of regular workers was 55,443 (up 5.5%), with increases mainly in full-time workers and part-timers. Looking at composition ratios of regular workers, full-time workers, part-timers, and contract workers accounted for 82.4%, 5.6%, and 6.0%, respectively.
- The number of regular workers per company was 101.7 (up 4.4 persons), and that of dispatched workers was 15.3 (up 4.5 persons).
- Looking at new hires and resignees, the rate of those newly hired and that of resignees for full-time workers were 9.4% (down 0.5 points) and 6.8% (0.0 points difference), respectively. The rate of contract workers newly hired was 25.8% (up 6.6 points), and that of those with cancelled contracts was 11.2% (down 3.5 points). The rate of contract cancellation for contract workers fell from the previous fiscal year, but remained high as compared to the rate of resignation of full-time workers.

Fig. 4-9 Number of Workers

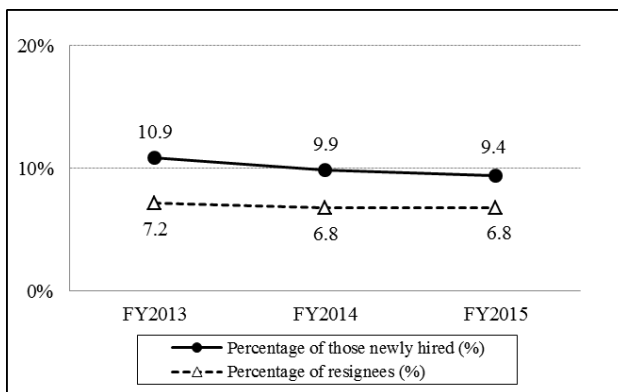
	Number of workers (persons)			Number of workers per company (persons)	
	FY2014 (n=540)	FY2015 (n=545)	Year-on-year (%)	FY2014	FY2015
Number of workers	52,863	55,642	5.3	97.9	102.1
Number of regular workers	52,554	55,443	5.5	97.3	101.7
Full-time workers/regular staff members	43,631	45,660	4.7	80.8	83.8
Part-timers	1,826	3,092	69.3	3.4	5.7
Workers transferred to other companies	1,658	1,873	13.0	3.1	3.4
Contract workers	2,895	3,347	15.6	5.4	6.1
Other regular workers	2,544	1,471	-42.2	4.7	2.7
Temporary or daily workers	309	199	-35.6	0.6	0.4
Dispatched workers	5,851	8,343	42.6	10.8	15.3

Fig. 4-10 Composition Ratios of Regular Workers



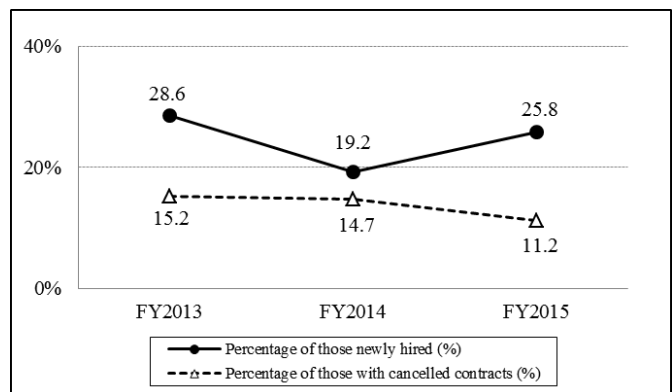
(Notes) Other regular workers = Regular workers - Full-time workers/regular staff members - Part-timers - Workers transferred to other companies - Contract workers

Fig. 4-11 Rate of Those Newly Hired and Resignees for Full-Time Workers/Regular Staff Members



(Notes) Percentage of those newly hired = Number of those newly hired / (Number of full-time workers/regular staff members + Number of resignees) × 100  
 Percentage of resignees = Number of resignees / (Number of full-time workers/regular staff members + Number of resignees) × 100

Fig. 4-12 Rate of Contract Workers Newly Hired and Contract Cancellation for Contract Workers



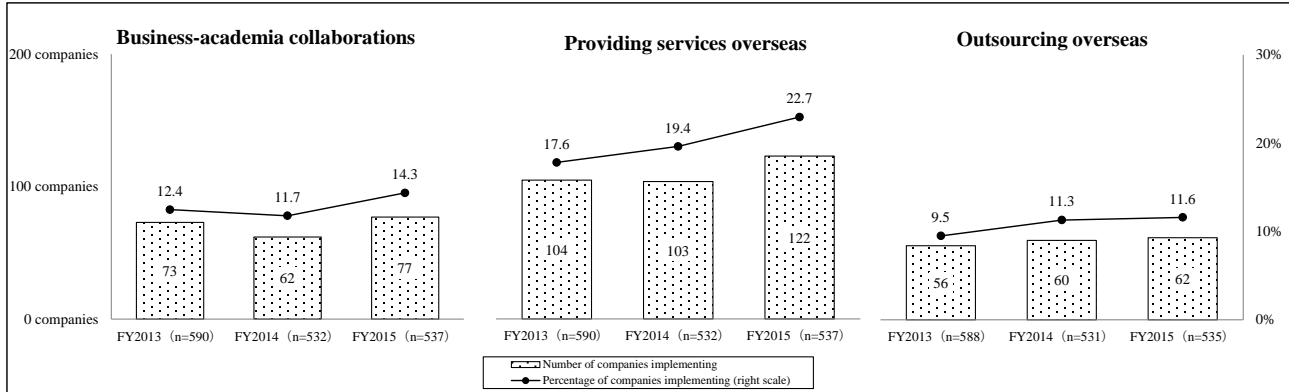
(Notes) Percentage of those newly hired = Number of those newly hired / (Number of contract workers + Number of those with cancelled contracts) × 100  
 Percentage of those with cancelled contracts = Number of those with cancelled contracts / (Number of contract workers + Number of those with cancelled contracts) × 100



## 5. Business operation

- Looking at business operation, the percentage of companies that carried out business-academia collaborations was 14.3% (up 2.6 points), the percentage of companies providing services overseas was 22.7% (up 3.3 points), and the percentage of companies implementing outsourcing overseas was 11.6% (up 0.3 points).

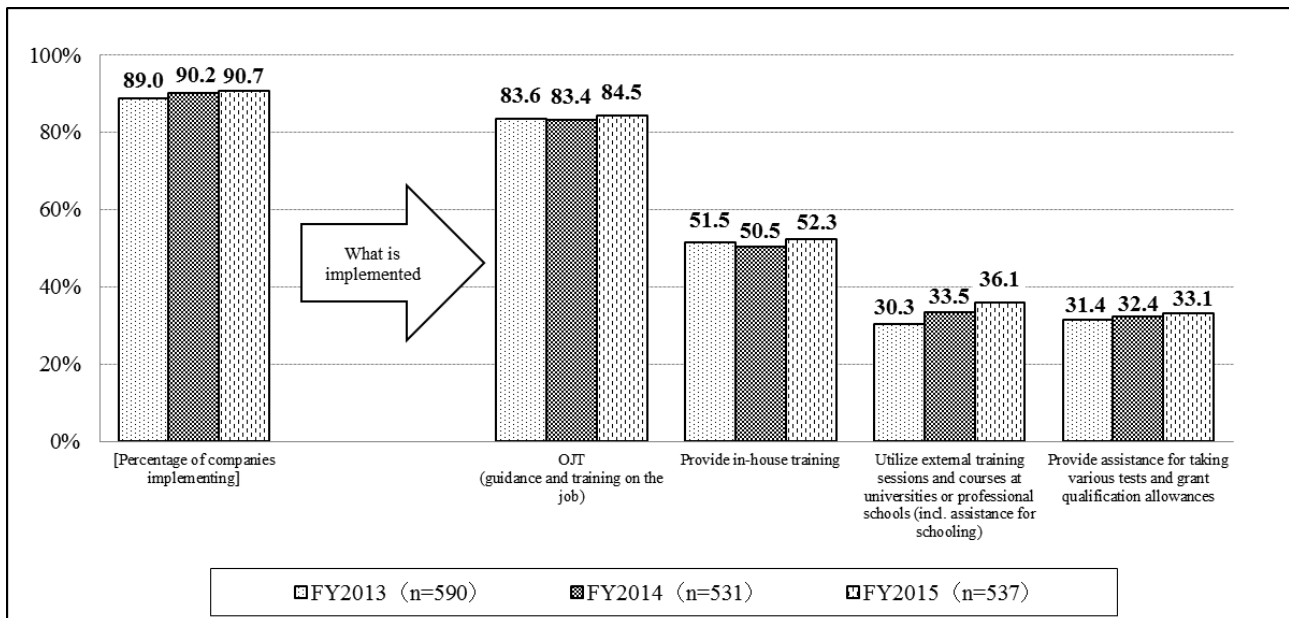
Fig. 4-13 Percentages of Companies Implementing Business Operations



## 6. Human resource development

- The percentage of companies that carried out human resource development activities accounted for 90.7% (up 0.5 points). Of these, 84.5% provide “OJT (guidance and training on the job)” (up 1.1 points), and 52.3% “Provide in-house training” (up 1.8 points).

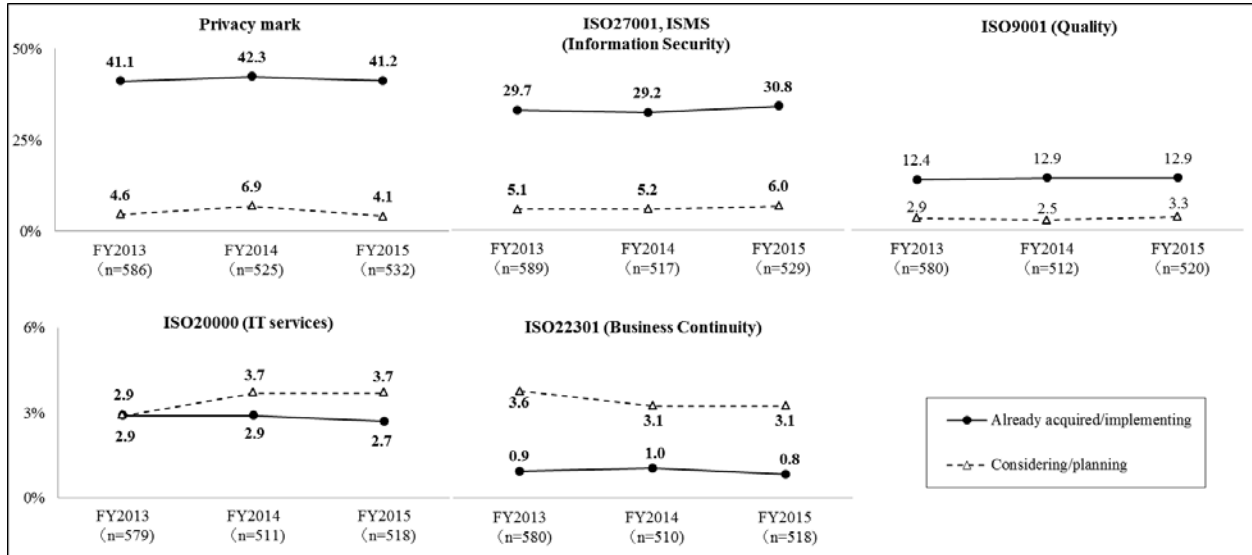
Fig. 4-14 Percentage of Companies that Carried out Human Resource Development Activities (Multiple answers allowed)



## 7. Efforts to acquire certifications

- Looking at efforts to acquire certifications, the percentage of certifications that companies “Already acquired/implementing” was the highest for “Privacy mark” at 41.2% (down 1.1 points), followed by “ISO27001, ISMS (Information Security)” at 30.8% (up 1.6 points). The percentages of companies “Considering/planning” these certifications were also high compared to others.

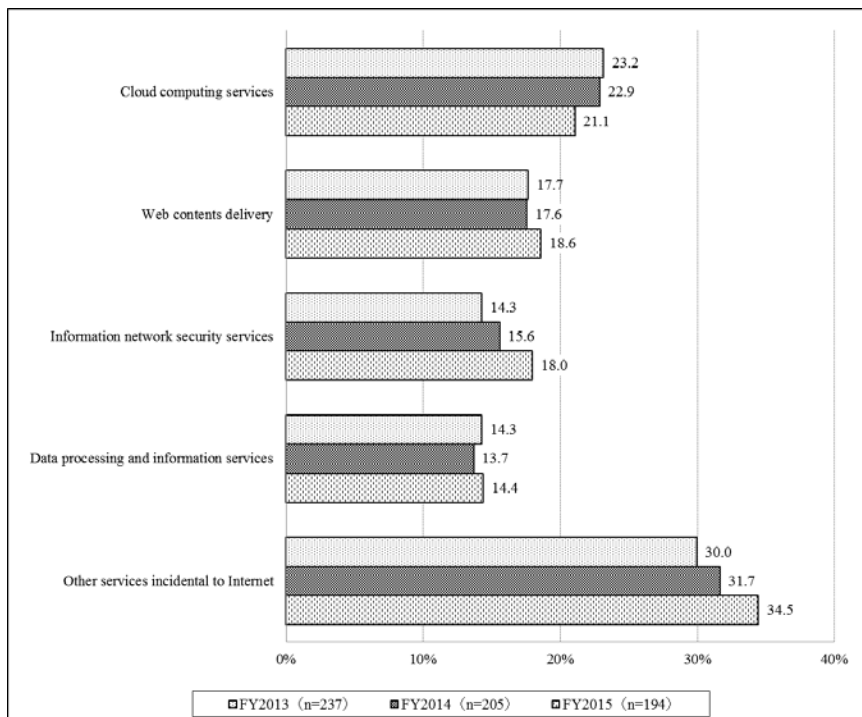
Fig. 4-15 Efforts to Acquire Certifications



## 8. New business fields

- Regarding major new business fields that companies intend to start within one year, the most common answer was “Cloud computing services” accounting for 21.1% (down 1.8 points), followed by “Web contents delivery” accounting for 18.6% (up 1.0 points).

Fig. 4-16 New Businesses that Companies Intend to Start within One Year (High-ranking) (Multiple answers allowed)



(Note) Figures are obtained by dividing the number of responses by the number of companies that provided valid responses to this question.

## Chapter 5 Information Service Business

This chapter shows the results of the Survey on Items for Each Business Type (Information Services) based on valid responses from 3,494 companies.

### 1. Number of companies and sales

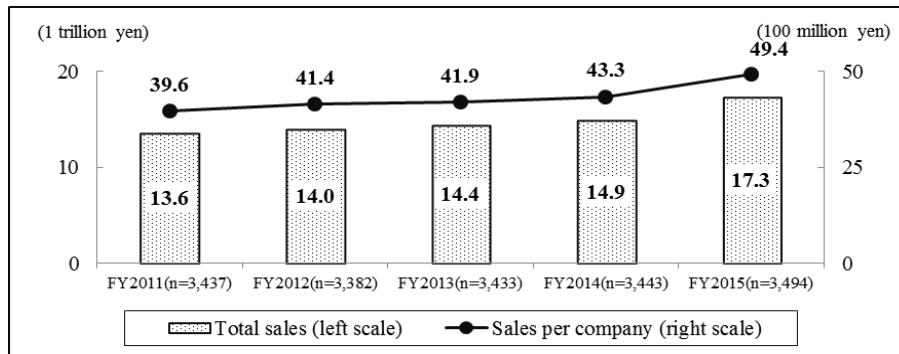
- The total sales of the information service business in FY2015 were 17.2683 trillion yen (up 15.9%), an increase for the sixth consecutive year and the largest since the start of the survey. By sector, custom software services earned the largest sales, 8.1406 trillion yen, followed by data processing services, with sales of 3.7207 trillion yen.
- Sales per company were 4.94 billion yen (up 14.2%), an increase in sales for all businesses, led by package software services (up 44.0%) and data processing services (up 19.3%).

Fig. 5-1 Number of Companies and Sales by Sector (Based on Companies' Activities)

	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2014	FY2015	Year-on-year (%)	FY2014	FY2015	Year-on-year (%)	FY2014	FY2015	Year-on-year (%)
Total	3,443	3,494	1.5	14,899,111	17,268,317	15.9	4,327.4	4,942.3	14.2
Custom software services	2,360	2,364	0.2	6,924,943	8,140,607	17.6	2,934.3	3,443.6	17.4
Embedded software services	247	261	5.7	223,139	246,525	10.5	903.4	944.5	4.5
Package software services	664	690	3.9	758,330	1,135,024	49.7	1,142.1	1,645.0	44.0
Game software services	100	90	-10.0	647,982	691,675	6.7	6,479.8	7,685.3	18.6
Data processing services	1,034	1,031	-0.3	3,128,160	3,720,667	18.9	3,025.3	3,608.8	19.3
Information services, except marketing or opinion research services	184	185	0.5	202,244	232,928	15.2	1,099.2	1,259.1	14.5
Market research, opinion survey and social survey services	87	97	11.5	137,488	174,101	26.6	1,580.3	1,794.9	13.6
Miscellaneous information services	1,096	1,076	-1.8	2,876,825	2,926,790	1.7	2,624.8	2,720.1	3.6
(Special tabulation) Companies that responded to the survey for the second consecutive year	2,974	2,974	-	14,008,922	14,966,899	6.8	4,710.5	5,032.6	6.8

(Note) The "number of companies" represents those that are operating relevant businesses even at a very minimal level, and thus, the "Total" and the sum of the category breakdown do not match perfectly.

Fig. 5-2 Change in Sales



(Reference: Based on Companies' Main Business)

	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2014	FY2015	Year-on-year (%)	FY2014	FY2015	Year-on-year (%)	FY2014	FY2015	Year-on-year (%)
Total	3,443	3,494	1.5	14,899,111	17,268,317	15.9	4,327.4	4,942.3	14.2
Custom software service companies	1,744	1,765	1.2	7,027,914	9,426,654	34.1	4,029.8	5,340.9	32.5
Embedded software service companies	89	95	6.7	158,550	179,789	13.4	1,781.5	1,892.5	6.2
Package software service companies	275	307	11.6	485,764	536,662	10.5	1,766.4	1,748.1	-1.0
Game software service companies	82	74	-9.8	653,459	697,308	6.7	7,969.0	9,423.1	18.2
Data processing service companies	617	615	-0.3	3,516,870	3,377,029	-4.0	5,700.0	5,491.1	-3.7
Information service companies	96	94	-2.1	186,290	195,512	5.0	1,940.5	2,079.9	7.2
Market research, opinion survey and social survey service companies	65	66	1.5	136,530	180,595	32.3	2,100.5	2,736.3	30.3
Miscellaneous information service companies	475	478	0.6	2,733,734	2,674,768	-2.2	5,755.2	5,595.7	-2.8

(Note) Data are compiled based on companies' main business, rated according to their business that generates the largest sales, and are tabulated as "XX companies".

- Looking at the composition ratios of sales by sector, custom software services accounted for the highest at 47.1%, followed by data processing services at 21.5%. These two sectors accounted for approximately 70% of the total.
- Looking at the composition ratios of the number of companies by sector, custom software services accounted for the highest at 40.8% (down 0.1 points), followed by miscellaneous information services at 18.6% (down 0.4 points) and data processing services at 17.8% (down 0.1 points).

Fig. 5-3 Composition Ratios of Sales by Sector (Based on Companies' Activities)

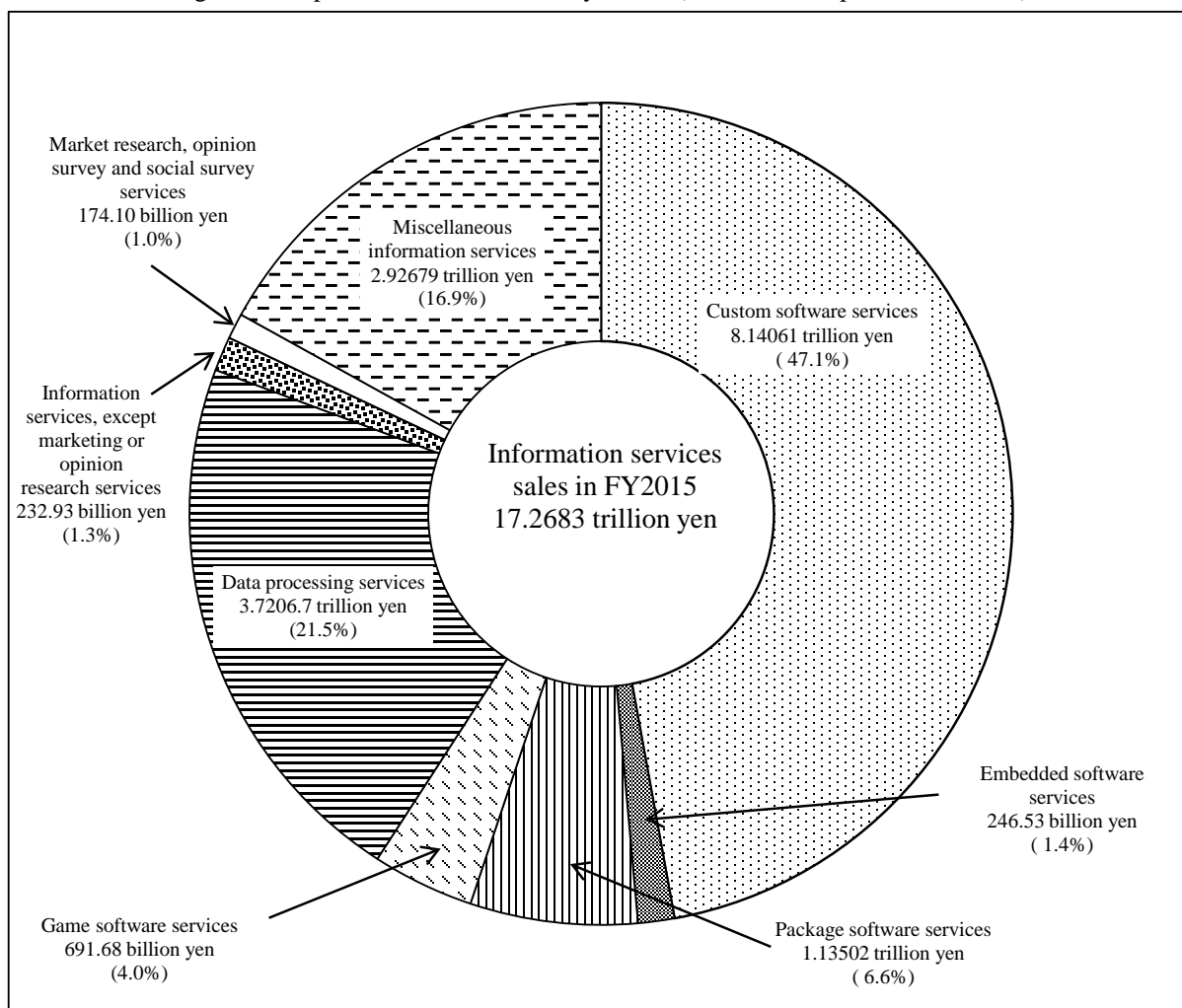
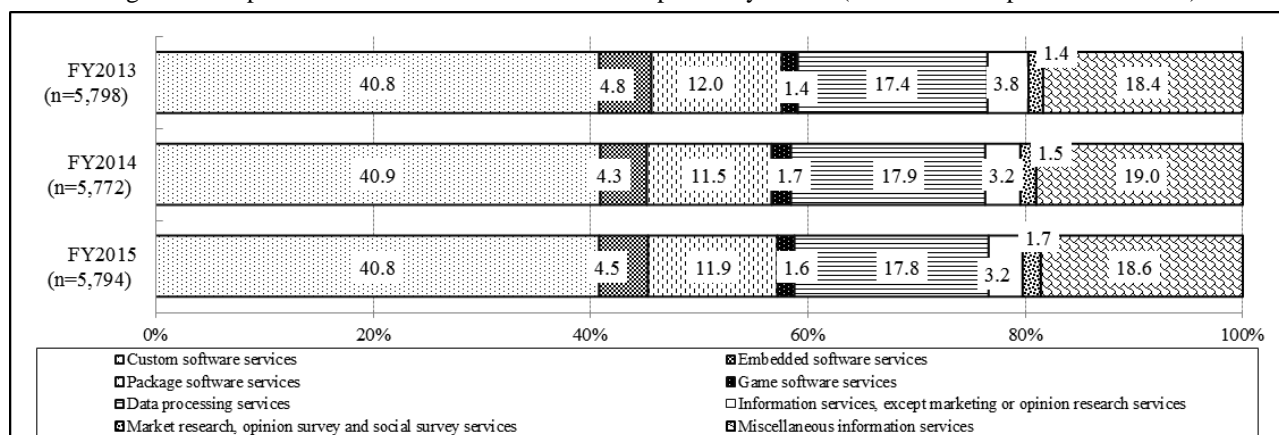


Fig. 5-4 Composition Ratios of the Number of Companies by Sector (Based on Companies' Activities)



## 2. Total operating costs (advertising costs)

- The advertising costs for in-house products/services per company were 63.6 million yen (up 20.5%).
- Looking at the breakdown of the advertising costs, media advertising costs accounted for 45.0% (down 1.2 points), out of which 21.1% (up 4.2 points) were for Internet advertisements, 17.0% (down 5.4 points) were for TV-CMs, and 3.8% (down 1.1 points) were for newspapers/magazines.

Fig. 5-5 Advertising Costs per Company

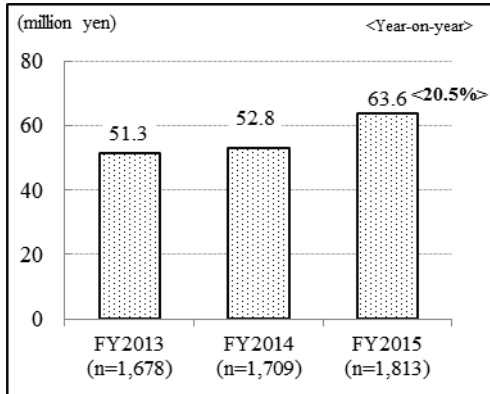
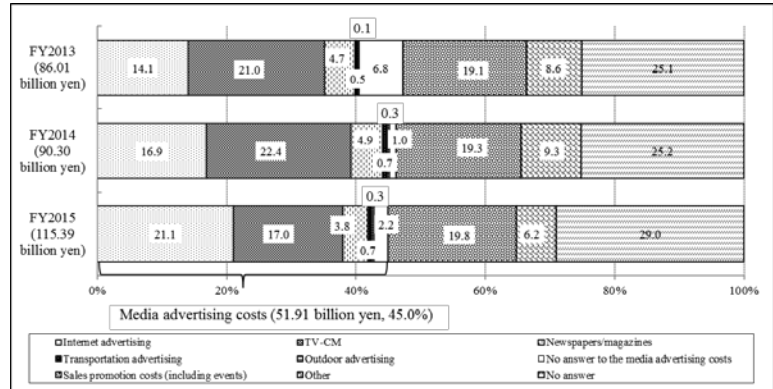


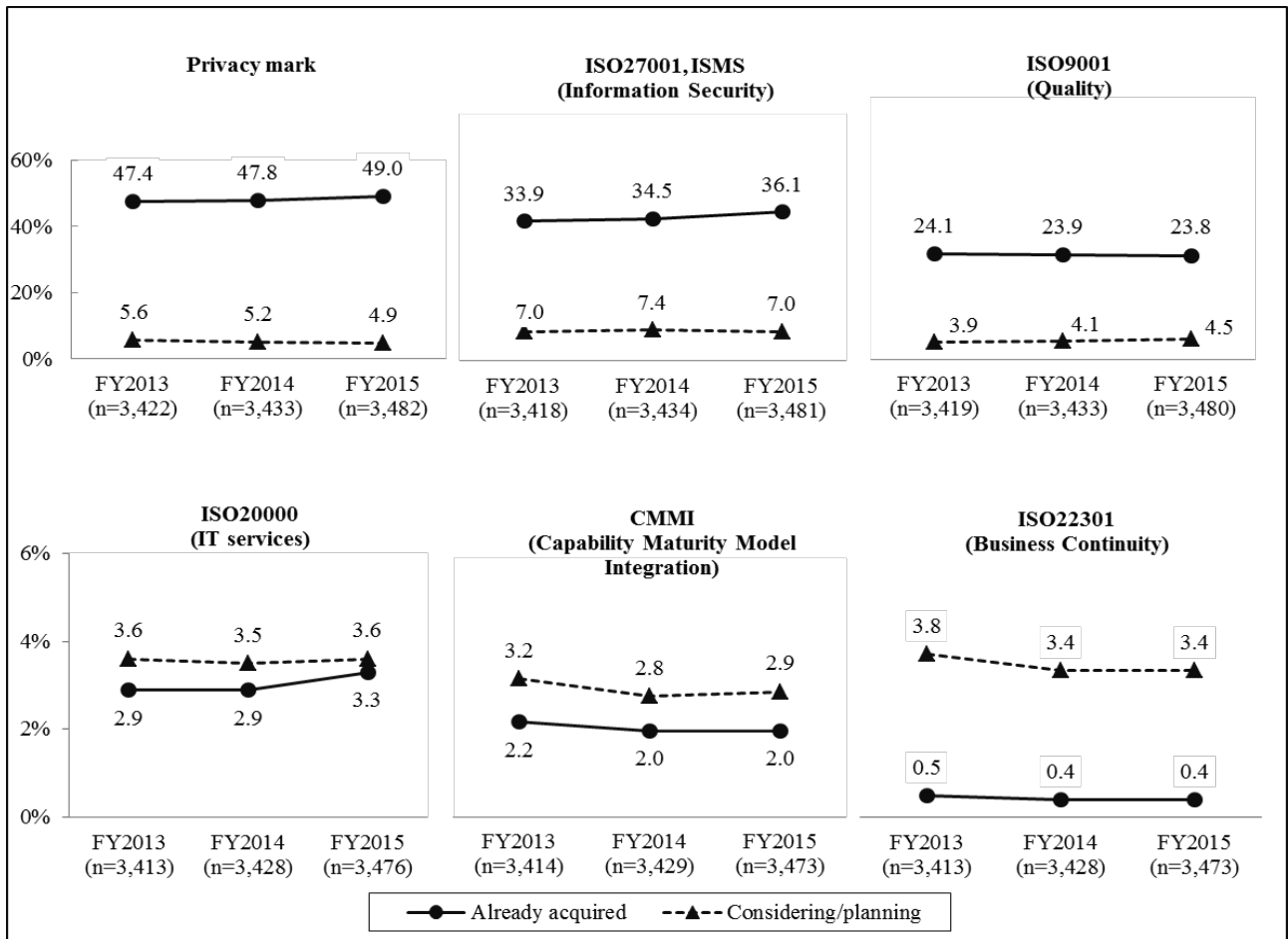
Fig. 5-6 Breakdown of Advertising Costs



## 3. Efforts to acquire certifications

- Looking at the percentage of certifications that companies “Already acquired”, 49.0% (up 1.2 points) acquired “Privacy mark”, 36.1% (up 1.6 points) acquired “ISO27001, ISMS (Information Security)”, and 23.8% (down 0.1 points) acquired “ISO9001 (Quality)”.

Fig. 5-7 Efforts to Acquire Certifications



#### 4. Acceptance of commissioned work in the development and production section

- Companies that accepted work commissioned by other companies accounted for 88.6% (down 0.8 points).
- The amount of accepted commissioned work per company was 2.84 billion yen (up 8.8%).
- Looking at the percentages of the number of companies according to primary contractors and subcontractors, the percentage of primary contractors accounted for 87.8% (up 1.2 points), and first subcontractors accounted for 56.2% (down 1.3 points). By capital, the percentage of primary contractors increased, and the percentage of subcontractors decreased, as capital was larger.

Fig. 5-8 Percentage of companies that accepted commissioned work

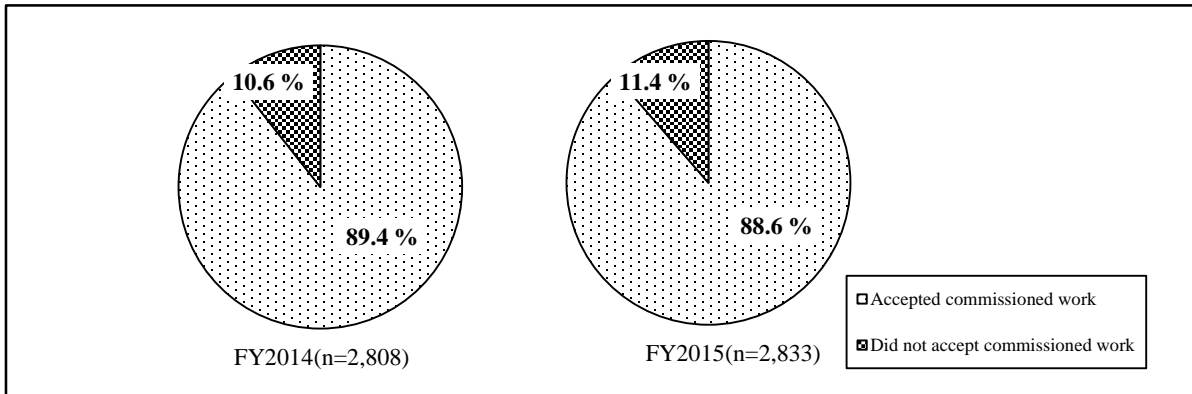


Fig. 5-9 Amount of accepted commissioned work per company

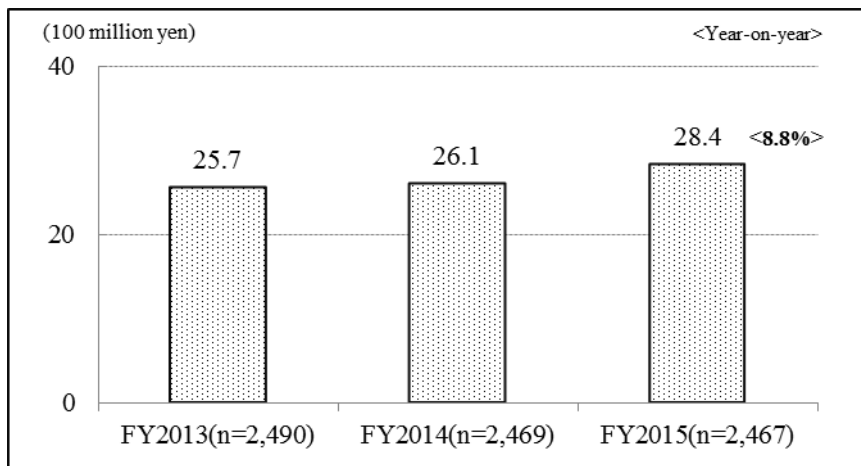


Fig. 5-10 Percentage of Number of Contractors and Subcontractors

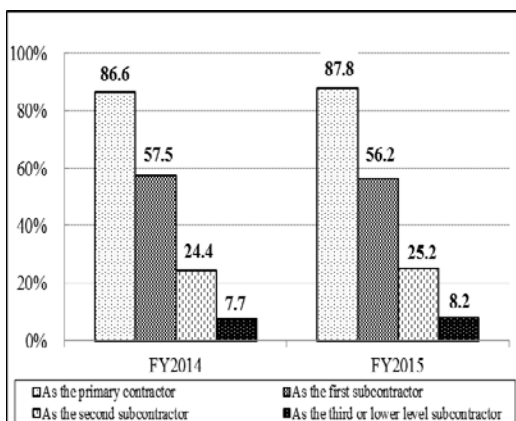
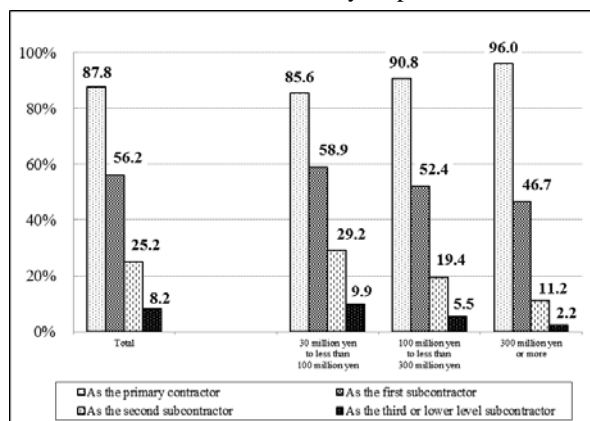


Fig. 5-11 Percentage of Number of Contractors and Subcontractors by Capital



(Note) Multiple answers were allowed for implementation of primary contractors and subcontractors; numbers are counted using the number of companies for which there were valid responses

### 5. Outsourcing in the development and production section

- The percentage of companies that outsourced work was 76.5% (up 0.5 points).
- The outsourcing cost per company was 1.50 billion yen (up 11.1%).
- Per company, 310.1 pieces of work were outsourced (up 36.7%). Of these, there were sales-based payments for 39.3 pieces of work (down 3.2%). Sales-based payment was adopted in 12.7% (down 5.2 points).

Fig. 5-12 Percentages of Companies Implementing Outsourcing

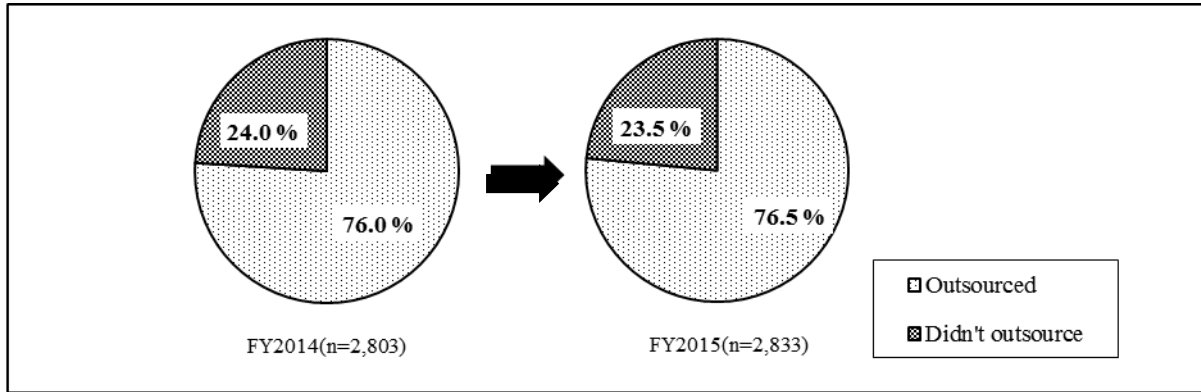


Fig. 5-13 Outsourcing Cost per Company

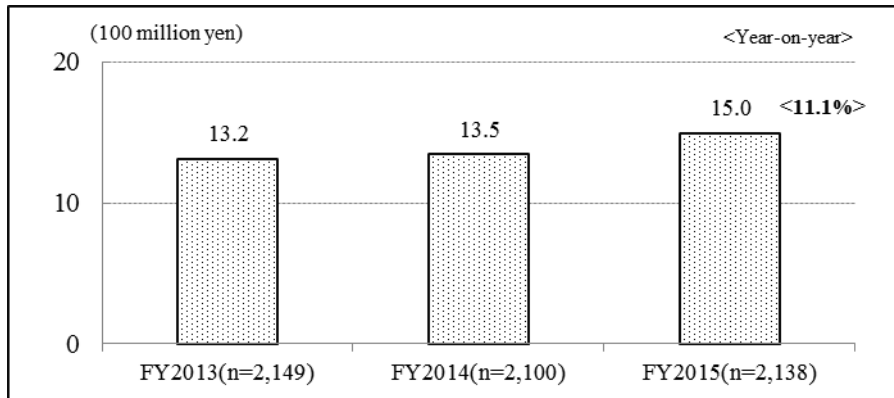
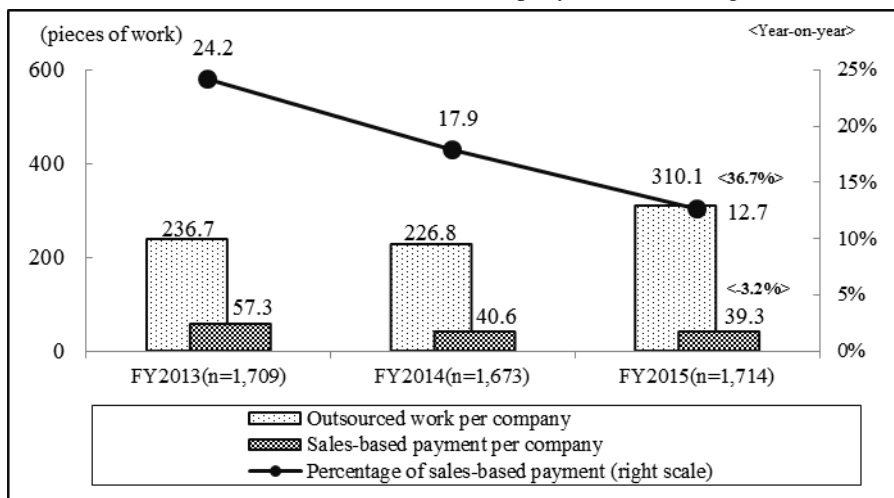


Fig. 5-14 Number of Pieces of Work Outsourced Per Company, And Percentage of Sales-Based Payment



(Note) Sales-based payment refers to a payment method based on the sales and profits of the orderer.

## 6. Number of workers in the development and production section

- The number of regular workers was 505,920 (up 9.5%), with increases in all workers, including full-time workers/regular staff members and part-timers, except other regular workers. Looking at composition ratios of regular workers, full-time workers/regular staff members and contract workers accounted for 91.5% and 3.4%, respectively.
- The number of regular workers per company was 179.0 (up 13.1 persons), and that of dispatched workers was 17.3 (up 1.1 persons).
- The percentage of full-time workers/regular staff members newly hired was higher than that of resignees, and so was that of contract workers newly hired than that of those with cancelled contracts. In comparing to full-time workers/regular staff members, there has been a greater change in the percentage of newly hired and cancelled contracts worker.

Fig. 5-15 Number of Workers

	Number of regular workers (persons)			Workers per company (persons)	
	FY2014 (n=2,785)	FY2015 (n=2,827)	Year-on-year (%)	FY2014	FY2015
Regular workers	462,034	505,920	9.5	165.9	179.0
Full-time workers/Regular staff members	423,809	463,082	9.3	152.2	163.8
Foreign workers	5,218	6,398	22.6	1.9	2.3
Part-timers	7,437	8,356	12.4	2.7	3.0
Workers transferred to other companies	12,488	15,037	20.4	4.5	5.3
Contract workers	15,393	16,963	10.2	5.5	6.0
Foreign workers	602	587	-2.5	0.2	0.2
Other regular workers	2,907	2,482	-14.6	1.0	0.9
Dispatched workers	45,212	49,013	8.4	16.2	17.3

(Notes) Other regular workers = Regular workers - Full-time workers/regular staff members - Part-timers - Workers transferred to other companies - Contract workers

Fig. 5-16 Composition Ratios of Regular Worker

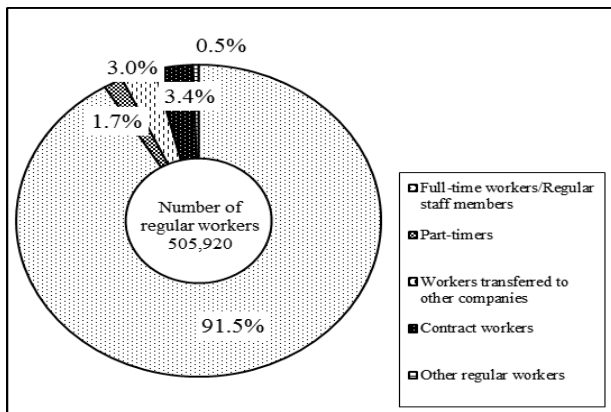


Fig. 5-17 Changes in the Number of Full-Time Workers/Regular Staff Members Per Company

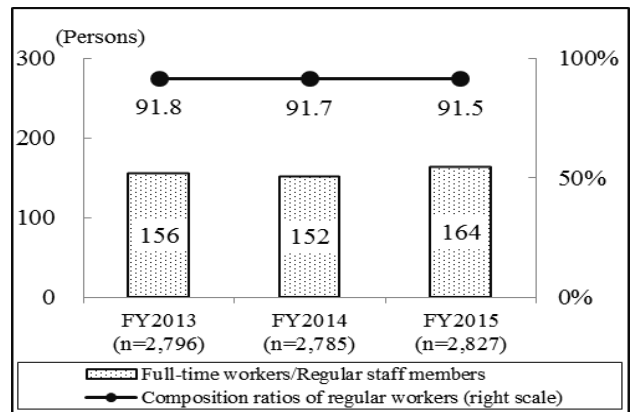
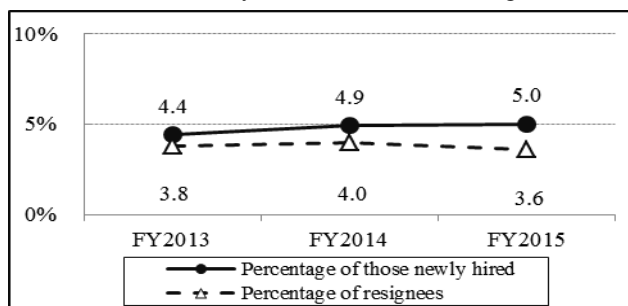
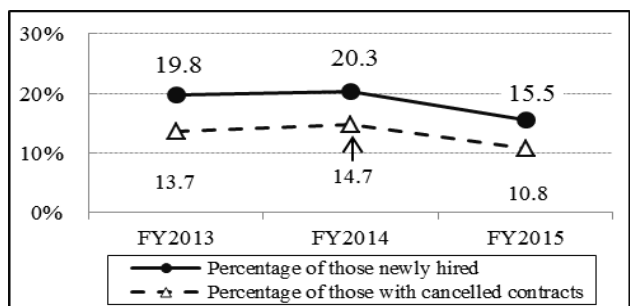


Fig. 5-18 Percentage of Full-Time Workers/Regular Staff Members Newly Hired and That of Resignees



(Notes) Percentage of those newly hired = Number of those newly hired / (Number of full-time workers/regular staff members + Number of resignees) × 100  
 Percentage of resignees = Number of resignees / (Number of full-time workers/regular staff members + Number of resignees) × 100

Fig. 5-19 Percentage of Contract Workers Newly Hired and That of Those with Cancelled Contracts



(Notes) Percentage of those newly hired = Number of those newly hired / (Number of contract workers + Number of those with cancelled contracts) × 100  
 Percentage of those with cancelled contracts = Number of those with cancelled contracts / (Number of contract workers + Number of those with cancelled contracts) × 100



**7. Human resource development in the development and production section**

- The percentage of companies that carried out human resource development activities accounted for 97.7% (up 0.4 points). Of them, 94.0% provide “OJT (guidance and training on the job)” (0.0 points difference), 73.7% “Provide in-house training” (up 1.5 points) and 64.0% provided “Provide assistance for taking the Information Technology Engineers Examination and grant qualification allowances” (up 0.4 points).
- The percentage of companies that carried out business-academia collaborations was 14.6% (down 0.1 points). The percentage of companies that offered cooperation for university education was 28.6% (up 1.0 points).

Fig. 5-20 Percentage of Companies that Carried out Human Resource Development Activities (Multiple answers allowed)

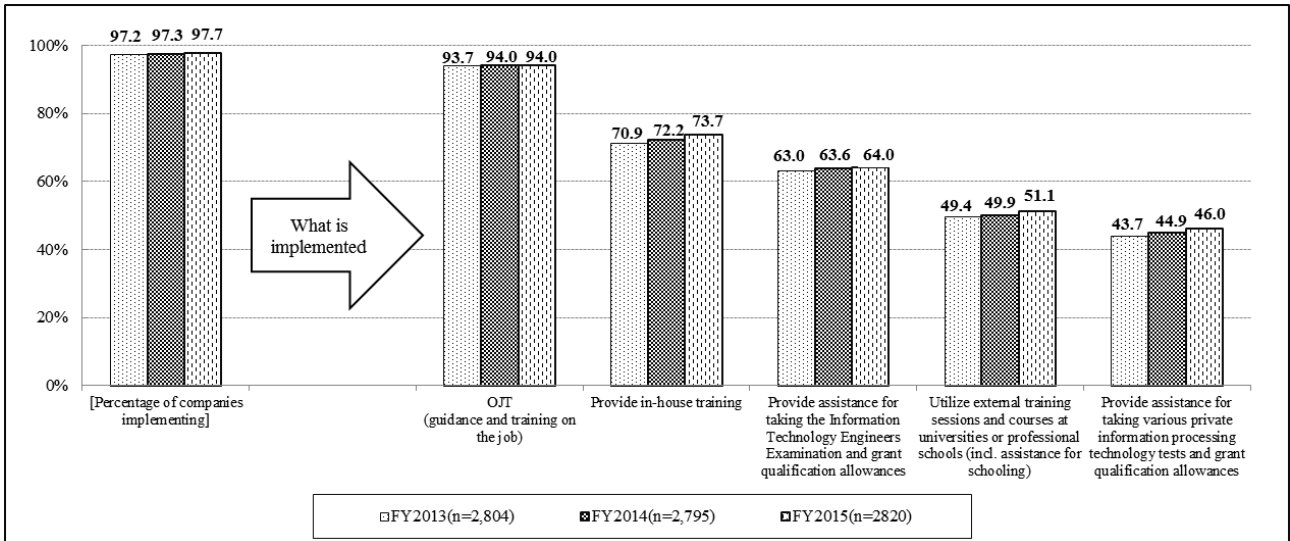


Fig. 5-21 University-related Business Operations (Business-academia collaboration)

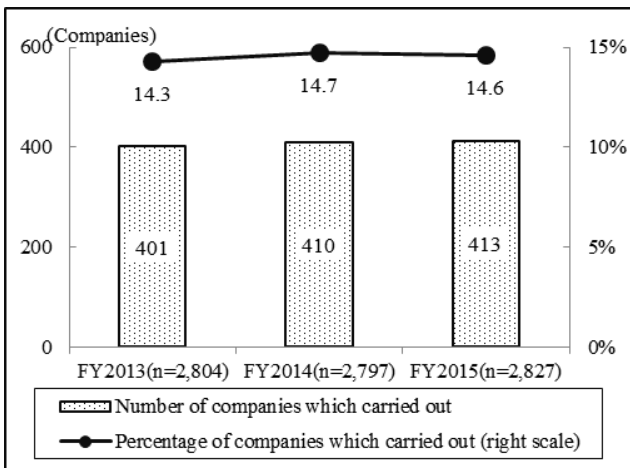
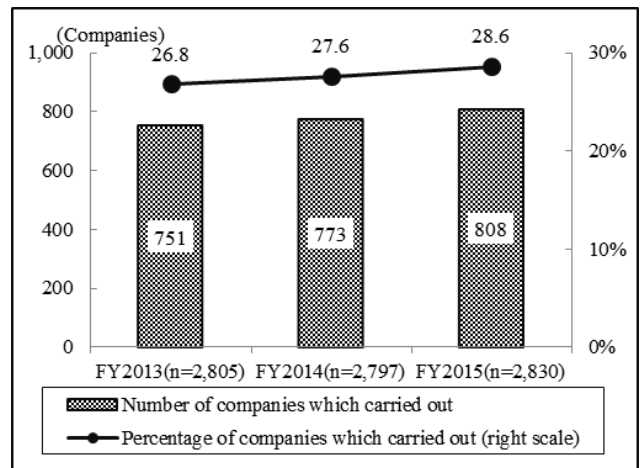


Fig. 5-22 University-related Business Operations (Cooperation for university education)



### 8. Salaries (annual income) in the development and production section

- Looking at the average annual income of engineers aged 35, full-time workers/regular staff members earned 5.04 million yen (up 0.6%) and contract workers earned 4.47 million yen (down 0.2%).
- Looking at the composition ratios of the number of companies by average annual income, 55.3% (down 1.1 points) of companies had full-time workers/regular staff members earning the average annual income of “5 million yen or less” and 69.5% (up 1.2 points) had contract workers earning “5 million yen or less”.
- Looking at the relationship between the average annual income (salaries) and the highest salaries, 42.4% (down 0.5 points) of companies had full-time workers/regular staff members with a difference of “More than 1.5 times” and 28.5% (up 2.0 points) had contract workers with a difference of “More than 1.5 times”.

Fig. 5-23 Average Income (Engineers aged 35)

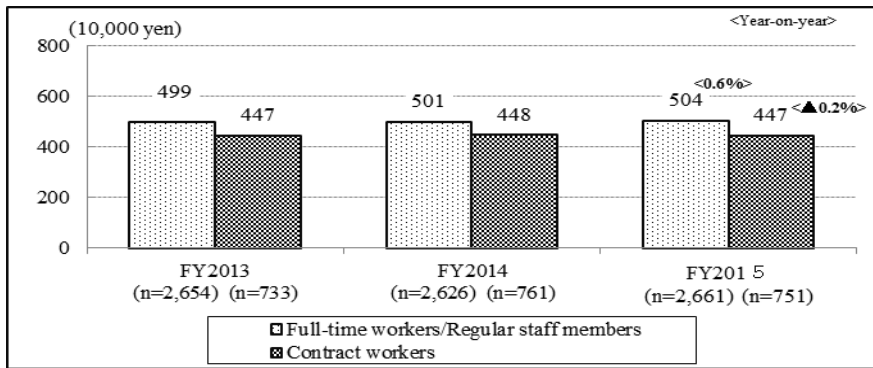


Fig. 5-24 Composition Ratios of the Number of Companies by Average Income (Engineers aged 35)

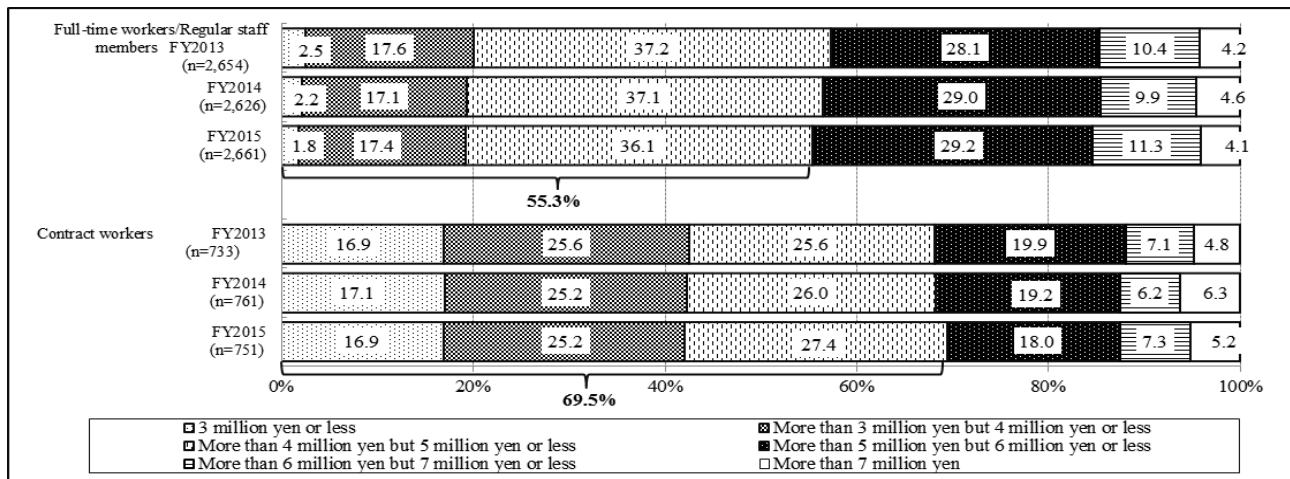
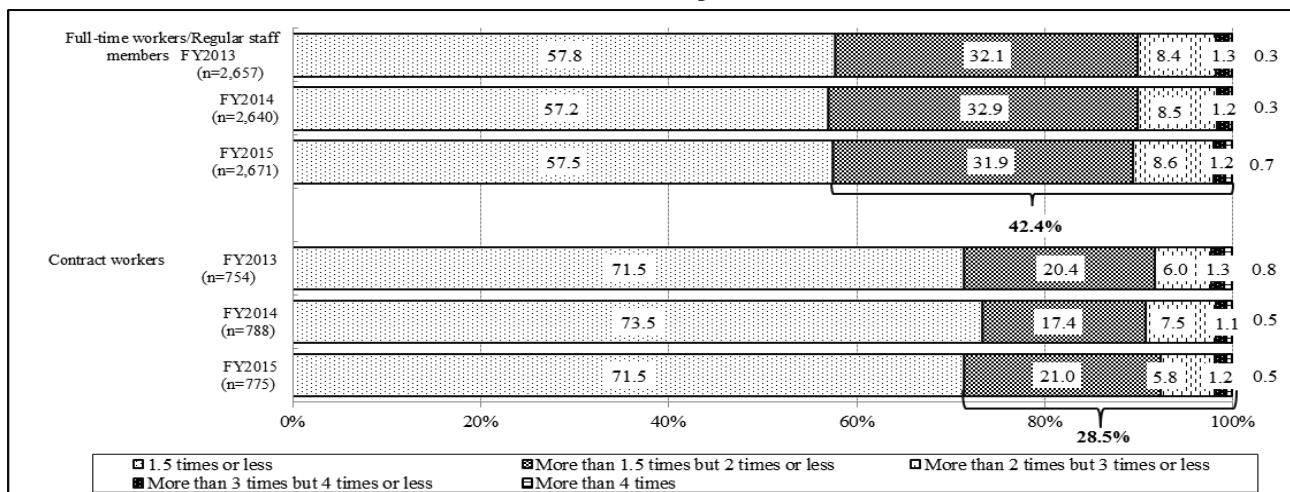


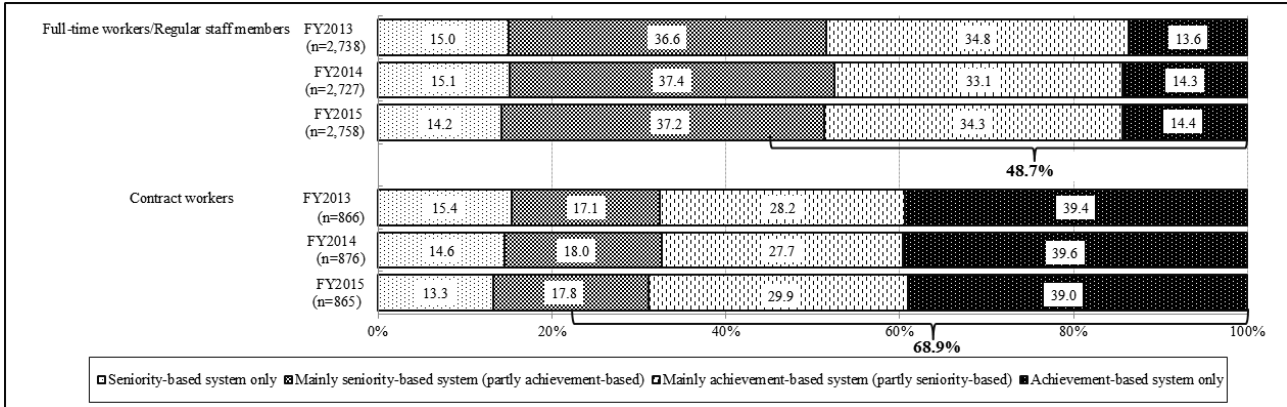
Fig. 5-25 Relationship Between the Highest Salaries and the Average at the Same Age (35) (Composition Ratios of the Number of Companies)



### 9. Salary system in the development and production section

- Looking at the salary system for engineers, achievement-based systems (total of “Achievement-based system only” and “Mainly achievement-based system (partly seniority-based)”) are applied to 48.7% (up 1.3 points) of full-time workers/regular staff members and 68.9% (up 1.6 points) of contract workers.

Fig. 5-26 Salary System for Engineers



### 10. Number of games developed and holding of rights

- The number of games developed per company was 9.3 (down 8.8%).
- Looking at the rights held concerning developed games, “Holding 100% of the rights” was the largest in number for both primary use and secondary use (composition ratios of 79.0% and 53.3%, respectively). The percentage of secondary use was 39.4%.

Fig. 5-27 Number of Games Developed per Company

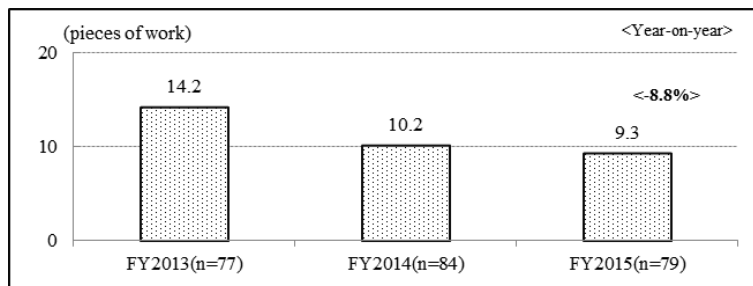
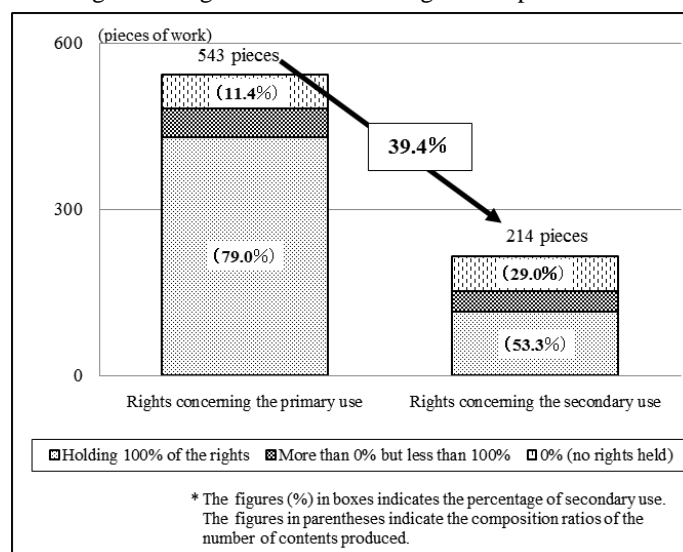


Fig. 5-28 Rights Held Concerning Developed Games



\* The figures (%) in boxes indicates the percentage of secondary use. The figures in parentheses indicate the composition ratios of the number of contents produced.

(Notes) “Secondary use” of games refers to commercialization of character goods, making of animated versions, and publishing books, etc.

## Chapter 6 Video Picture Information, Sound Information, Character Information Production and Distribution Business

This chapter shows the results of the Survey on Items for Each Business Type (Video Picture Information, Sound Information, Character Information Production and Distribution) based on valid responses from 697 companies.

### 1. Number of companies and sales

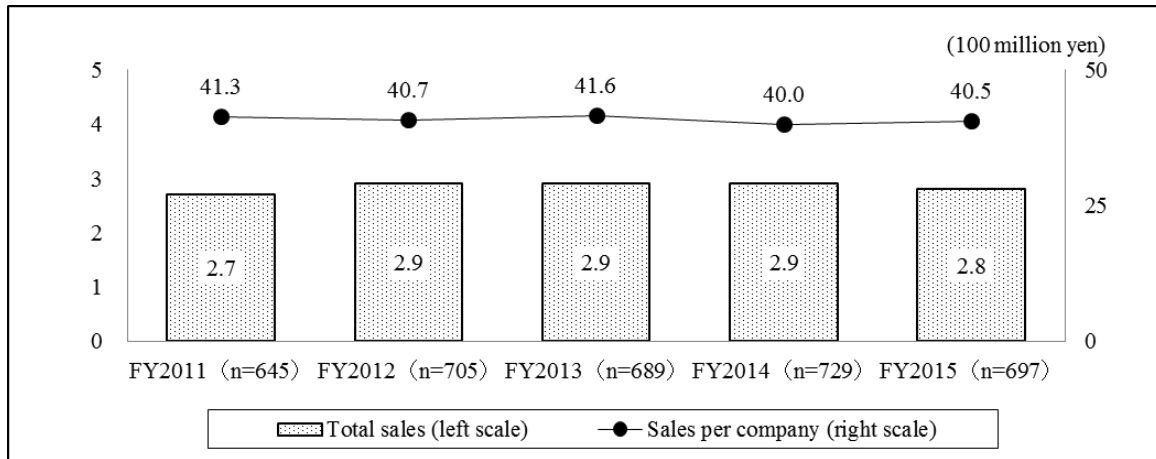
- The total sales of the video picture information, sound information, character information production and distribution business in FY2015 were 2.8248 trillion yen (down 3.1 points). By sector, newspaper publishers earned the largest sales, 1.0354 trillion yen, followed by publishers, except newspapers, which made sales of 822.1 billion yen.
- The sales per company were 4.05 billion yen (up 1.4%).

Fig. 6-1 Number of Companies and Sales by Sector (Based on Companies' Activities)

	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2014	FY2015	Year-on-year (%)	FY2014	FY2015	Year-on-year (%)	FY2014	FY2015	Year-on-year (%)
Total	729	697	-4.4	2,914,751	2,824,827	-3.1	3,998.3	4,052.8	1.4
Motion picture and video production service	130	117	-10.0	105,084	87,442	-16.8	808.3	747.4	-7.5
Animation production service	33	24	-27.3	67,476	59,599	-11.7	2,044.7	2,483.3	21.5
Recording and disk production service	29	28	-3.4	160,101	137,718	-14.0	5,520.7	4,918.5	-10.9
Newspaper publishers	116	117	0.9	1,052,389	1,035,361	-1.6	9,072.3	8,849.2	-2.5
Publishers, except newspapers	315	306	-2.9	805,770	822,107	2.0	2,558.0	2,686.6	5.0
Commercial art and graphic design service	189	179	-5.3	437,022	393,356	-10.0	2,312.3	2,197.5	-5.0
Motion picture, video and television program distribution service	50	46	-8.0	135,284	140,113	3.6	2,705.7	3,045.9	12.6
Service incidental to video picture information, sound information, character information production and distribution	181	182	0.6	151,625	149,131	-1.6	837.7	819.4	-2.2
(Special tabulation) Companies that responded to the survey for the second consecutive year	599	599	-	2,730,799	2,660,240	-2.6	4,558.9	4,441.1	-2.6

(Notes) The number of companies indicates those that are engaged in this business, whether as their main business or not, and therefore the Total and the sum of category breakdowns do not match perfectly.

Fig. 6-2 Change in Sales



(Reference: Based on Companies' Main Business)

	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2014	FY2015	Year-on-year (%)	FY2014	FY2015	Year-on-year (%)	FY2014	FY2015	Year-on-year (%)
Total	729	697	-4.4	2,914,751	2,824,827	-3.1	3,998.3	4,052.8	1.4
Motion picture and video production companies	70	67	-4.3	74,794	86,474	15.6	1,068.5	1,290.7	20.8
Animation production companies	23	17	-26.1	75,065	61,675	-17.8	3,263.7	3,627.9	11.2
Recording and disk production companies	15	17	13.3	164,775	145,483	-11.7	10,985.0	8,557.8	-22.1
Newspaper publishers	103	107	3.9	1,061,978	1,047,556	-1.4	10,310.5	9,790.2	-5.0
Publishers, except newspapers	240	227	-5.4	813,058	826,726	1.7	3,387.7	3,642.0	7.5
Commercial art and graphic design companies	127	121	-4.7	435,404	384,645	-11.7	3,428.4	3,178.9	-7.3
Motion picture, video and television program distribution companies	33	28	-15.2	146,141	144,430	-1.2	4,428.5	5,158.2	16.5
Service companies incidental to video picture information, sound information, character information production and distribution	118	113	-4.2	143,536	127,838	-10.9	1,216.4	1,131.3	-7.0

(Note) Data are compiled based on companies' main business, rated according to their business that generates the largest sales, and are tabulated as "XX companies".

- Looking at the composition ratios of sales by sector, sales by newspaper publishers accounted for the majority, at 36.7%, followed by sales by publishers, except newspapers, at 29.1%.
- Looking at the composition ratios of the number of companies by sector, publishers, except newspapers, accounted for the majority, at 43.9% (up 0.7 points), followed by services incidental to video picture information, sound information, character information production and distribution, at 26.1% (up 1.3 points).

Fig. 6-3 Composition Ratios of Sales by Sector (Based on Companies' Activities)

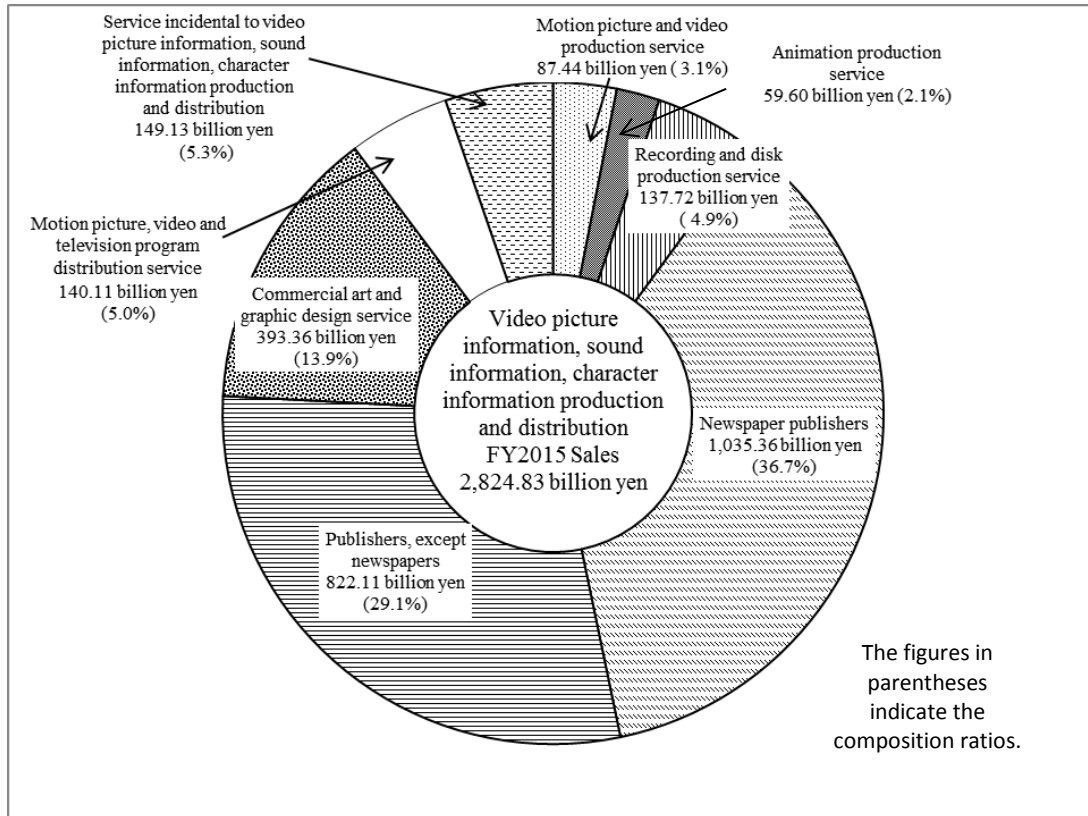
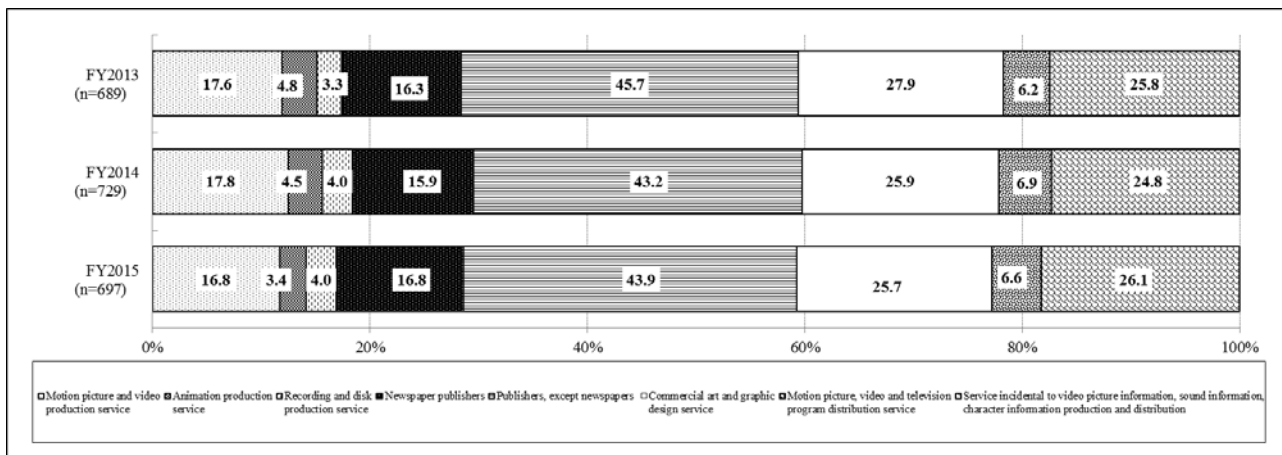


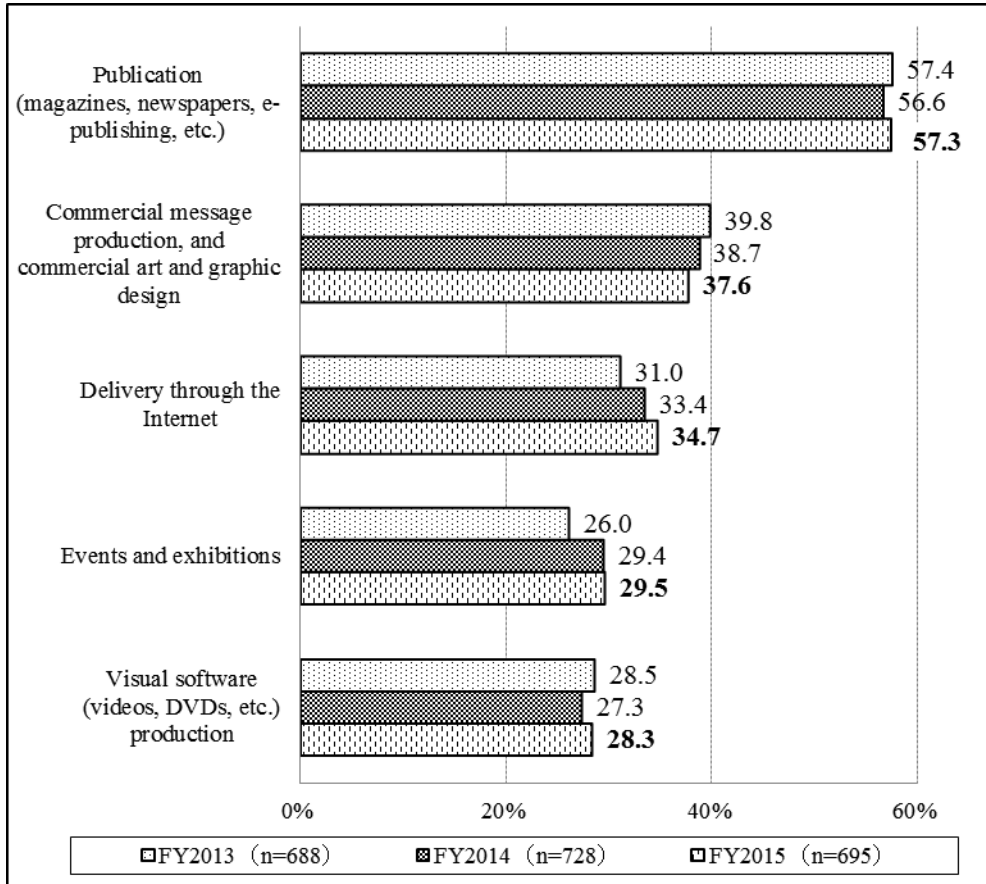
Fig. 6-4 Composition Ratios of the Number of Companies by Sector (Based on Companies' Activities)



## 2. Business operation

- Regarding business operation, 57.3% of the companies (up 0.7 points) were already engaged in “Publication (magazines, newspapers, e-publishing, etc.)” and 37.6% (down 1.1 points) in “Commercial message production, and commercial art and graphic design”.

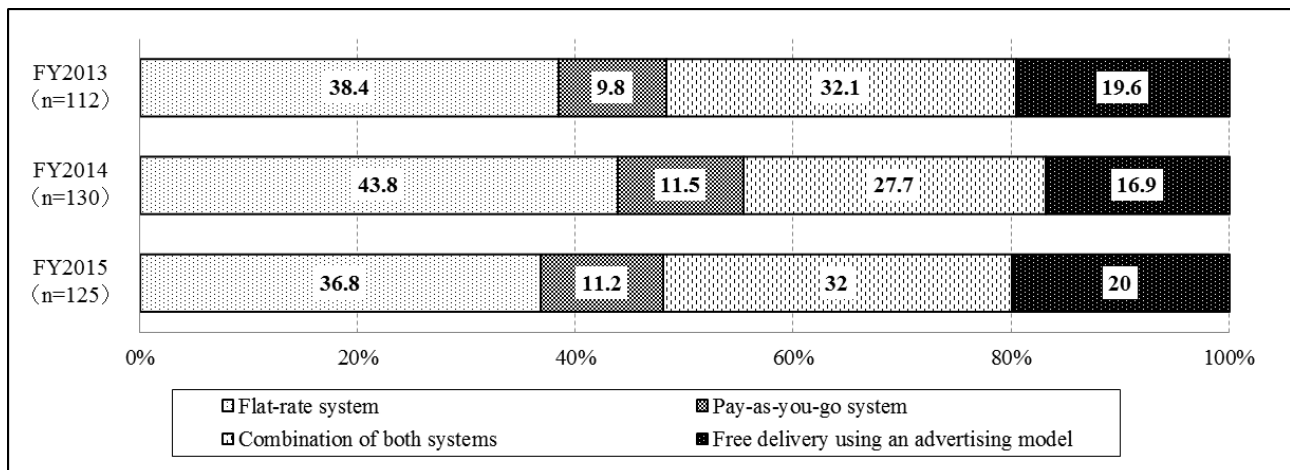
Fig. 6-5 Business Operation (Already Doing It) (High-ranking) (Multiple answers allowed)



## 3. Charge system

- With regard to charge systems for the video picture and music delivery services, the “Flat-rate system” was the most common at 36.8% (down 7.0 points), followed by “Combination of both systems” at 32.0% (up 4.3 points).

Fig. 6-6 Charge Systems for the Video Picture and Music Delivery Services



#### 4. Content production in the content production section

- The number of content production per company was 130.9 pieces of contents (up 7.0%).
- Looking at the rights held concerning produced contents, 69.5% of the companies held the full right for primary use, and 60.9% held the full right for the secondary use. In both cases, companies “Holding 100% of the rights” were the largest in number.
- By major sector, the percentage of motion picture and video production companies that held the full right for the primary and secondary use was both lower than newspaper publishers and publishers, except newspapers.

Fig. 6-7 Number of Contents Produced

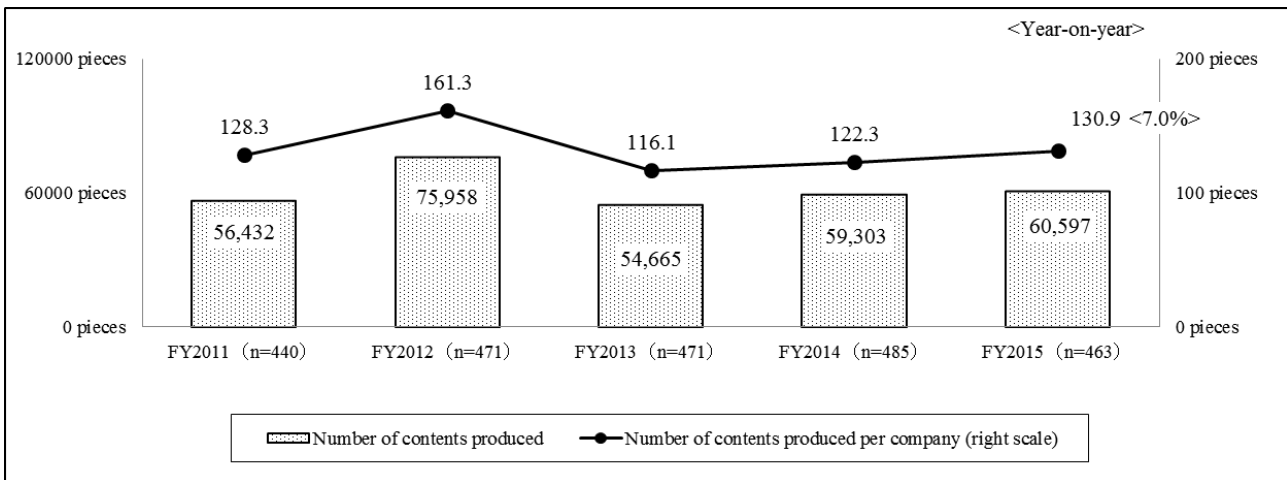
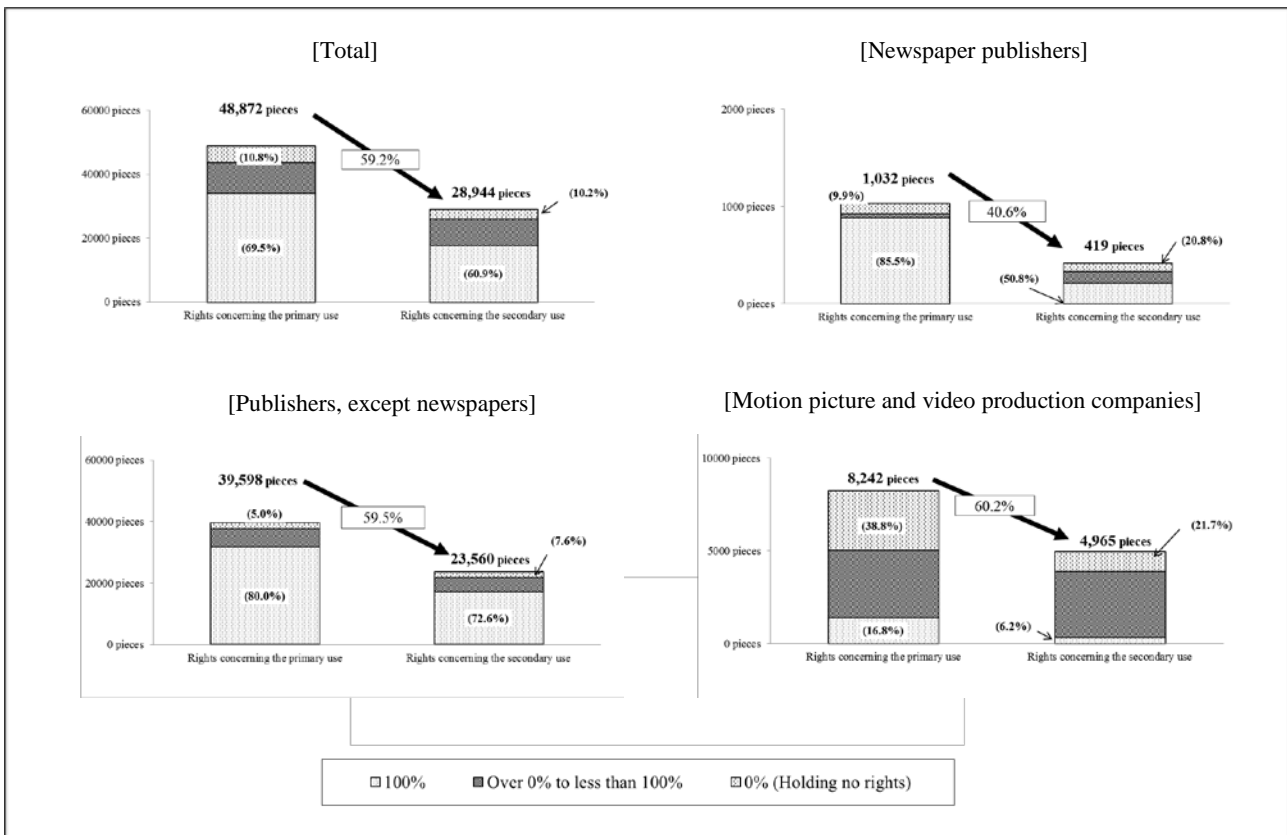


Fig. 6-8 Holding of Rights for Produced Contents (Major Sectors)



(Notes) The figures (%) in boxes indicates the percentage of secondary use.

The figures in parentheses indicate the composition ratios of the number of contents produced.

(Note) Data are compiled based on companies' main business, rated according to their business that generates the largest sales, and are tabulated as “XX companies”.

## 5. Copyrights in the content production section

- Looking at DRM (Digital Rights Management technology) used to prevent private copies, 42.0% (down 5.7 points) of packages (CDs and DVDs, etc.) used DRM and 58.0% (down 2.6 points) of delivery services (Internet delivery and cellular phone delivery, etc.) used DRM.
- Looking at attitudes toward copyright, the total of “Closer to A (copyright protection such as DRM should be strengthened in order to prevent illegal private use)” and “Somewhat closer to A” accounted for 55.4% (down 2.6 points).

Fig. 6-9 DRM

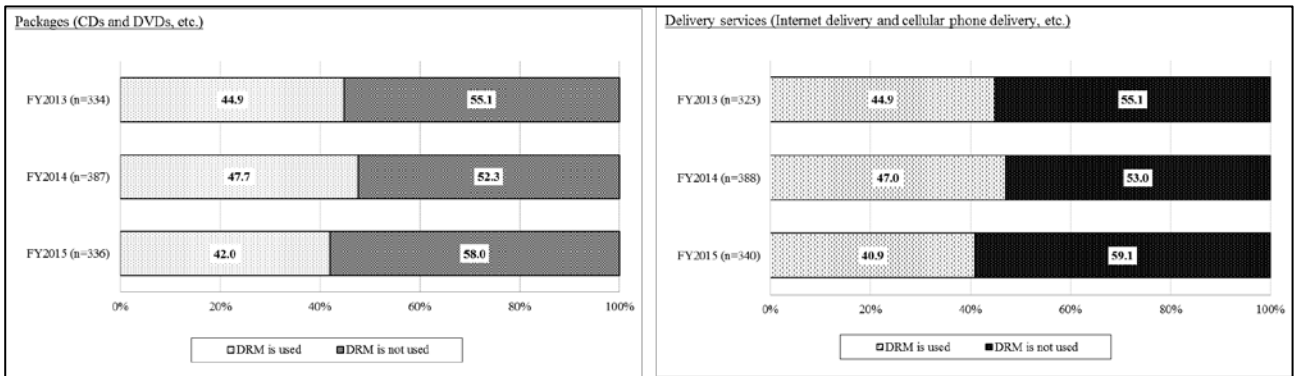


Fig. 6-10 Attitudes Toward Copyright Protection (Overall)

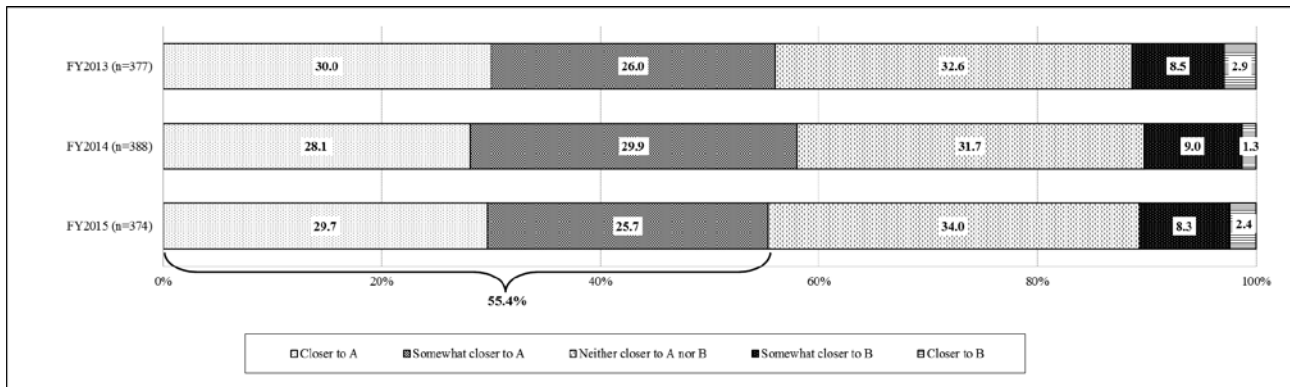
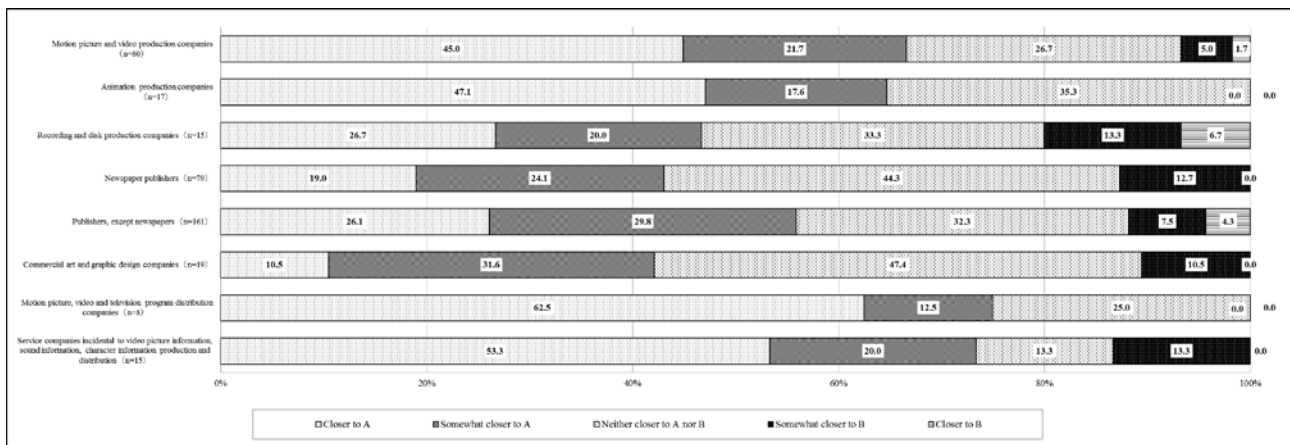


Fig. 6-11 Attitudes Toward Copyright Protection (Major Sectors)



A: Copyright protection such as DRM should be strengthened in order to prevent illegal private use.

B: Copyright protection such as DRM should only be strengthened moderately because somewhat free private use can gain publicity and broaden the user base.

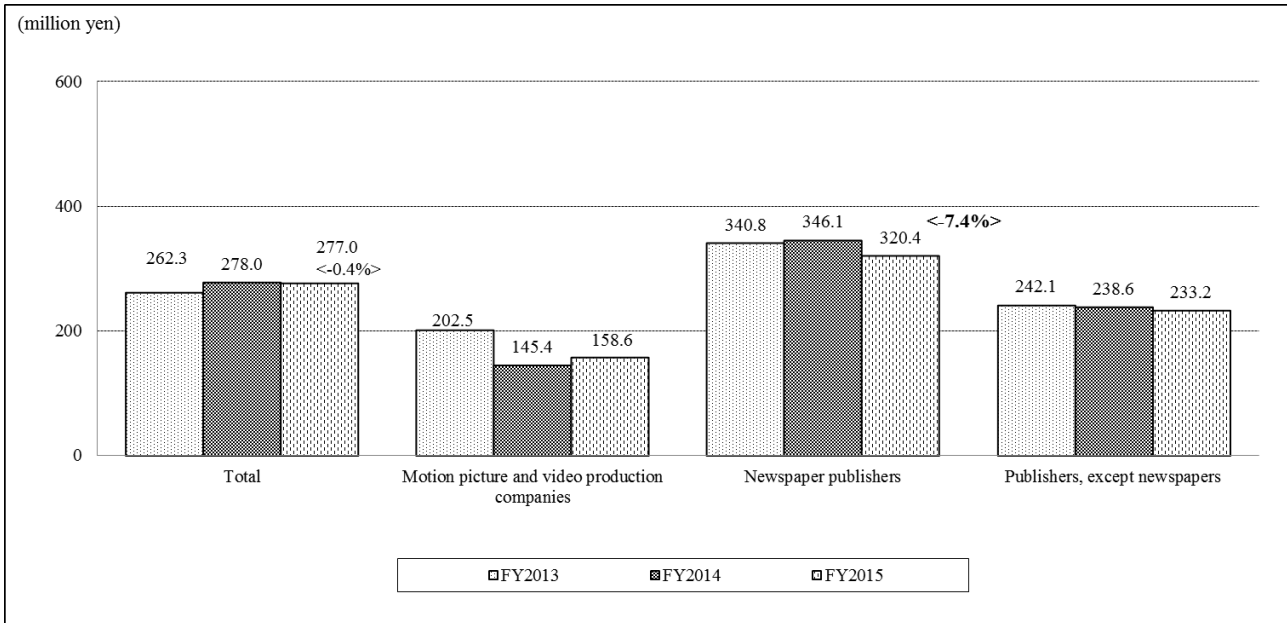
(Note) Data are compiled based on companies' main business, rated according to their business that generates the largest sales, and are tabulated as “XX companies”.



**6. Total operating costs (advertising costs) in the content production section**

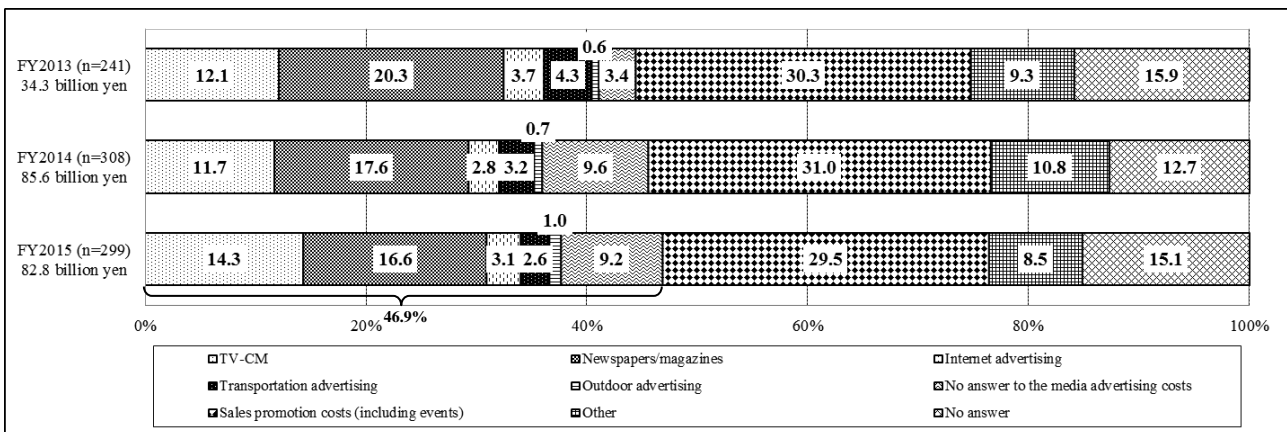
- The advertising costs for contents per company were 280 million yen (down 0.4%). By major sector, that of newspaper publishers were 320 million yen (down 7.4%).
- Looking at the breakdown of the advertising costs for contents (82.81 billion yen), media advertising costs accounted for 46.9% and sales promotion costs (including events) accounted for 29.5%.
- Looking at the breakdown of the media advertising costs (38.80 billion yen, 46.9%), newspapers/magazines accounted for 16.6% and TV-CMs 14.3%.

Fig. 6-12 Advertising Costs for Contents per Company (Major Sectors)



(Note) Data are compiled based on companies' main business, rated according to their business that generates the largest sales, and are tabulated as "XX companies".

Fig. 6-13 Breakdown of Advertising Costs



## 7. Outsourcing in the content production section

- 58.0% of companies implemented outsourcing (down 0.1 points).
- The outsourcing cost per company was 610 million yen (roughly no point difference).
- The number of outsourced contents was 25,845 pieces. Among the number of contents outsourced, sales-based payments were adopted in 3.5% of the payments.
- By major sector, sales-based payments in publishers, except newspapers, represented 1.8%, which was less than that of other sectors.

Fig. 6-14 Percentages of Companies Implementing Outsourcing

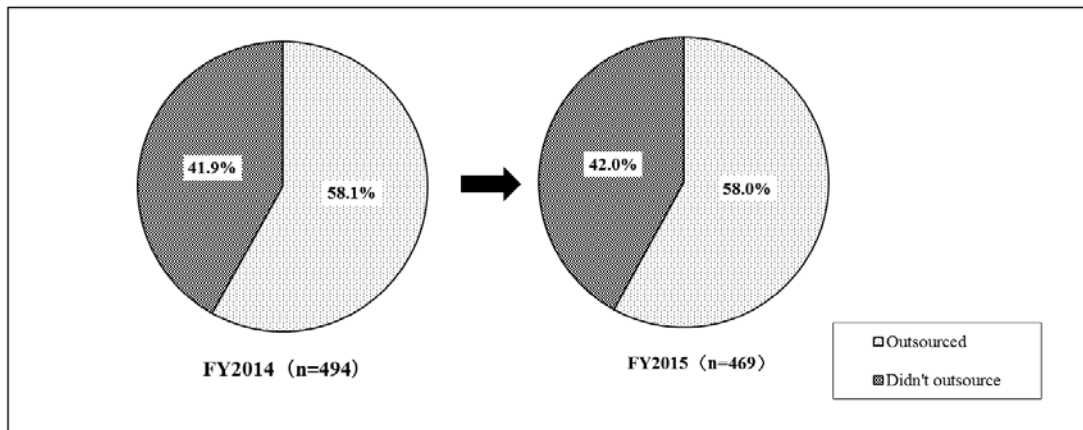
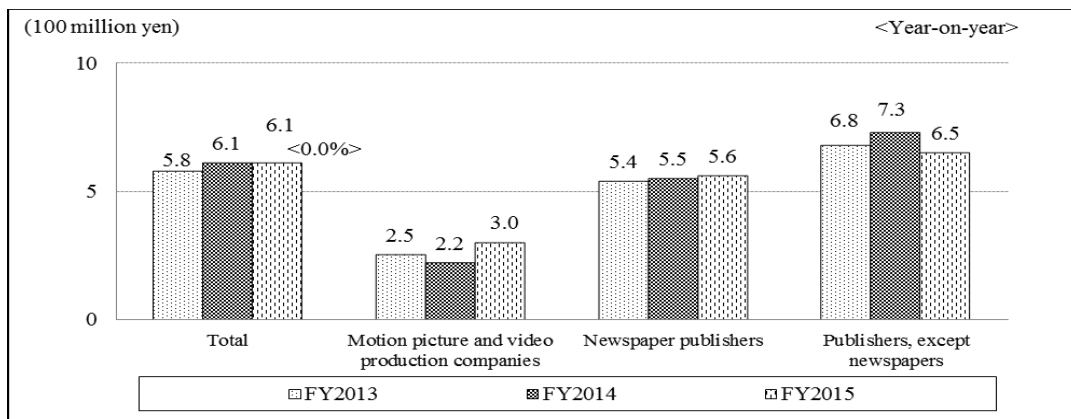
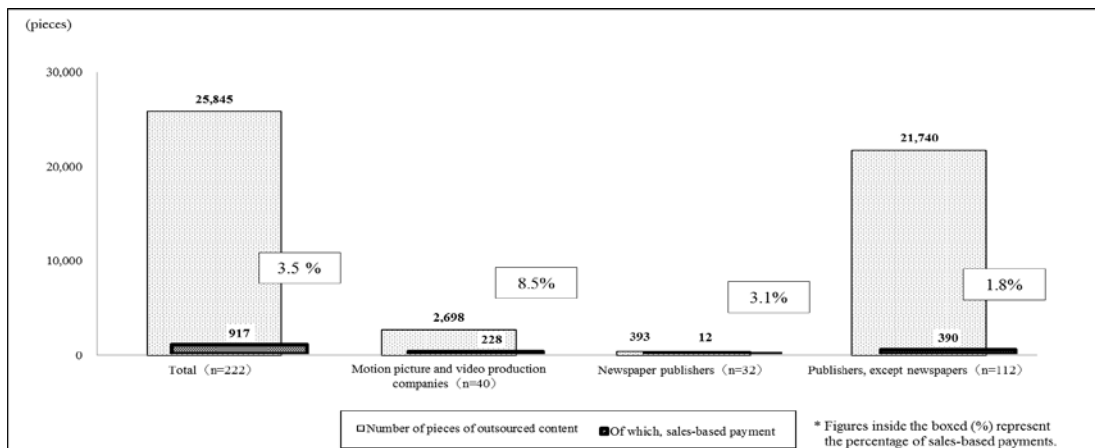


Fig. 6-15 Amount Outsourced Per Company (Major Sectors)



(Note) Data are compiled based on companies' main business, rated according to their business that generates the largest sales, and are tabulated as "XX companies".

Fig. 6-16 Number of pieces of Outsourced Content and Number/Percentage of Sales-Based Payments (Major Sectors)



(Note) Sales-based payment refers to a payment method based on the sales and profits of the orderer.

(Note) Data are compiled based on companies' main business, rated according to their business that generates the largest sales, and are tabulated as "XX companies".

## 8. Number of workers in the content production section

- The number of regular workers was 44,035 (down 0.6%), with increases mainly in contract workers.
- The number of regular workers per company was 93.5 (up 2.7 persons). The number of full-time workers/regular staff members was 70.5 (up 2.1 persons).

By major sector, newspaper publishers have the largest number of regular workers per company, 221 persons, while motion picture and video production companies have the smallest at 27 persons.

- Looking at new hires and resignees, the rate of those newly hired and that of resignees for full-time workers/regular staff members were 2.4% (down 0.1 points) and 2.4% (down 0.3 points), respectively. The rate of contract workers newly hired was 10.8% (down 2.6 points), and that of those with cancelled contracts was 7.8% (down 2.8 points). The rate of contract workers newly hired and the contract cancellation for contract workers were high as compared to full-time workers/regular staff members.

Fig. 6-17 Number of workers in the development and content production section

	Number of workers (person)			Number of workers per company (person)	
	FY2014 (n=488)	FY2015 (n=471)	Year-on-year (%)	FY2014	FY2015
Number of regular workers	44,292	44,035	-0.6	90.8	93.5
Full-time workers/Regular staff members	33,381	33,226	-0.5	68.4	70.5
Part-timers	3,283	3,134	-4.5	6.7	6.7
Workers transferred to other companies	1,450	1,320	-9.0	3.0	2.8
Contract workers	3,476	3,708	6.7	7.1	7.9
Other regular workers	2,702	2,647	-2.0	5.5	5.6
Temporary or daily workers	426	315	-26.1	0.9	0.7
Dispatched workers	1,261	1,201	-4.8	2.6	2.5

(Notes) Other regular workers = Regular workers - Full-time workers/regular staff members - Part-timers - Workers transferred to other companies - Contract workers

Fig. 6-18 Number of Regular Workers per Company in the Content Production Section (Major Sectors)

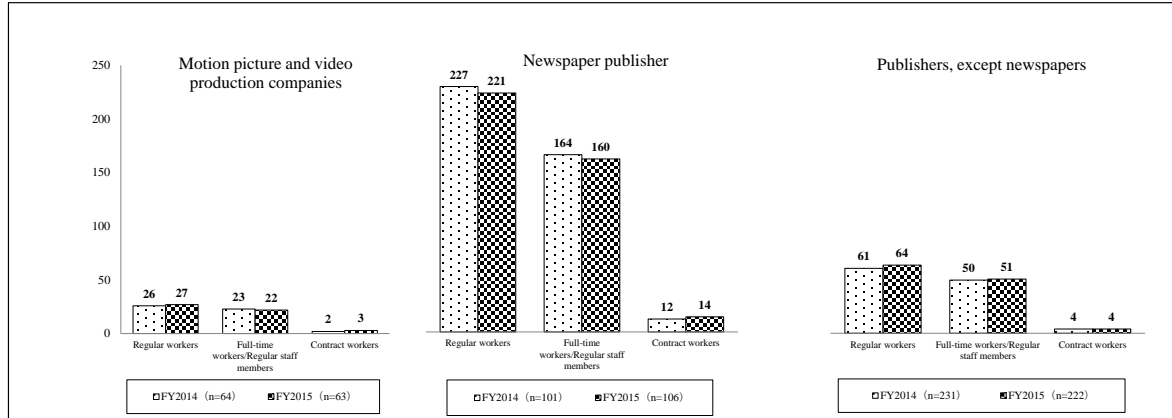
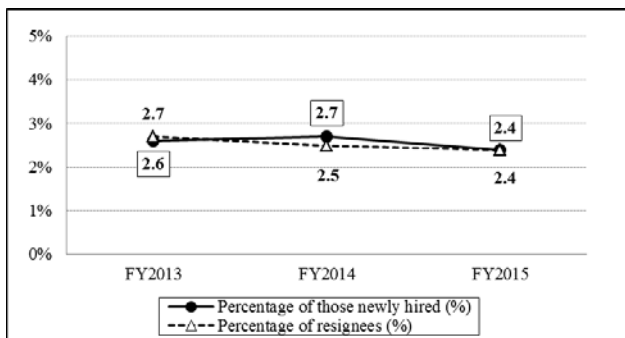
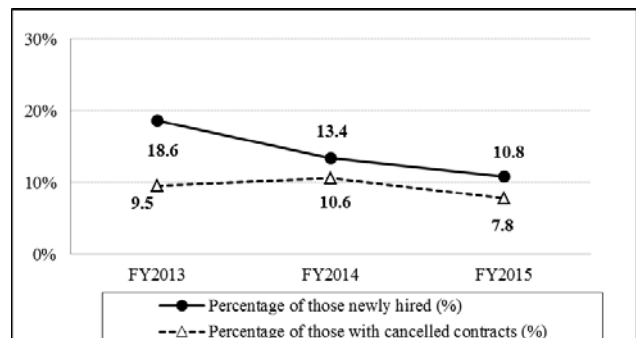


Fig. 6-19 Percentage of Full-Time Workers/Regular Staff Members Newly Hired and That of Resignees



(Notes) Percentage of those newly hired = Number of those newly hired / (Number of full-time workers/regular staff members + Number of resignees) × 100  
 Percentage of resignees = Number of resignees / (Number of full-time workers/regular staff members + Number of resignees) × 100

Fig. 6-20 Percentage of Contract Workers Newly Hired and That of Those with Cancelled Contracts



(Notes) Percentage of those newly hired = Number of those newly hired / (Number of contract workers + Number of those with cancelled contracts) × 100  
 Percentage of those with cancelled contracts = Number of those with cancelled contracts / (Number of contract workers + Number of those with cancelled contracts) × 100

### 9. Salaries (annual income) in the content production section

- Looking at the average annual income of workers aged 35, full-time workers/regular staff members earned 5.10 million yen (up 1.8%) and contract workers earned 3.58 million yen (down 5.0%).
- Looking at the composition ratios of the number of companies by average annual income, 29.5% (down 2.9 points) of companies had full-time workers/regular staff members earning the average annual income of “More than 4 million yen but 5 million yen or less” and 24.5% (up 1.8 points) had those earning “More than 3 million yen but 4 million yen or less”. For contract workers, 42.0% (up 2.4 points) of companies had those earning “3 million yen or less” and 25.2% (down 3.9 points) had those earning “More than 3 million yen but 4 million yen or less”.
- Looking at the relationship between the highest salaries and the average annual income, 52.7% (up 0.5 points) of companies had full-time workers/regular staff members with a difference of “1.5 times or less” and 34.8% (up 0.4 points) with a difference of “More than 1.5 times but 2 times or less”. For contract workers, 71.4% (up 0.5 points) of companies had those with a difference of “1.5 times or less” and 12.9% (down 1.3 points) with a difference of “More than 1.5 times but 2 times or less”.

Fig. 6-21 Average Income (Workers aged 35)

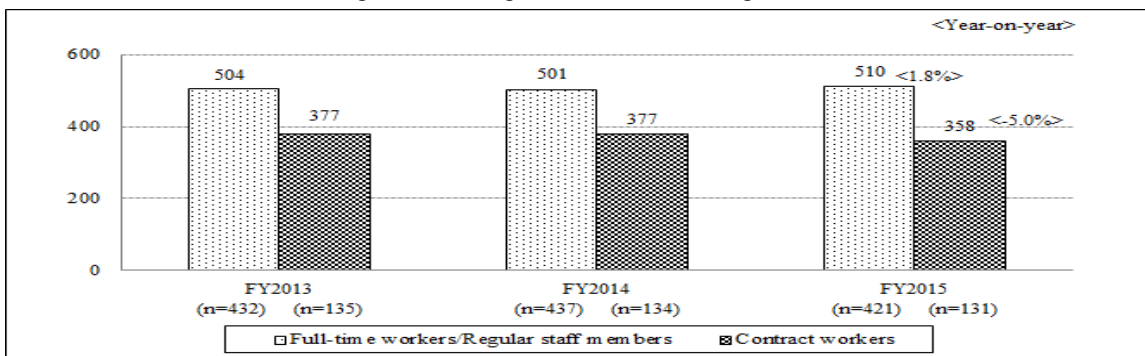


Fig. 6-22 Composition Ratios of the Number of Companies by Average Income (Workers aged 35)

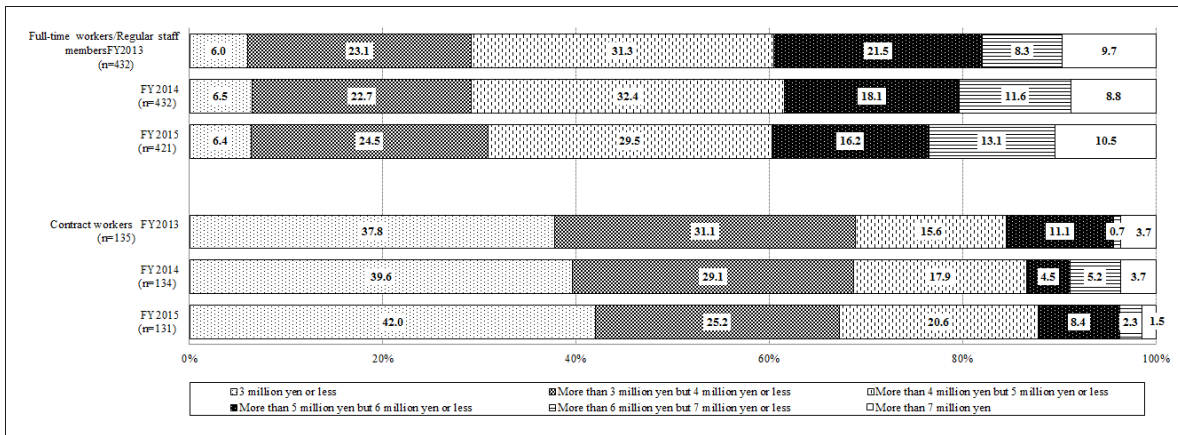
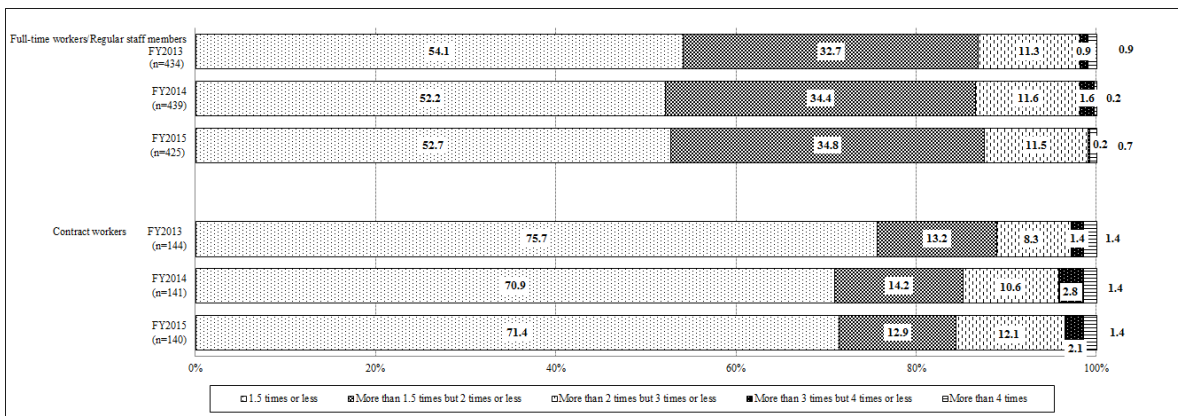


Fig. 6-23 Relationship Between the Highest Salaries and the Average at the Same Age (35) (Composition Ratios of the Number of Companies)



### 10. Salary system in the content production section

- For full-time workers, “Mainly seniority-based system (partly achievement-based)” was the most common at 42.0% (up 0.4 points), followed by “Seniority-based system only” at 31.6% (up 0.2 points).
- For contract workers, “Seniority-based system only” was the most common at 33.7% (up 7.2 points), followed by “Mainly achievement-based system (partly seniority-based)” at 27.1% (down 5.3 points). The percentage of “Achievement-based system only” was high (15.1%) as compared to full-time workers/regular staff members.

Fig. 6-24 Salary System for Full-Time Workers/Regular Staff Members

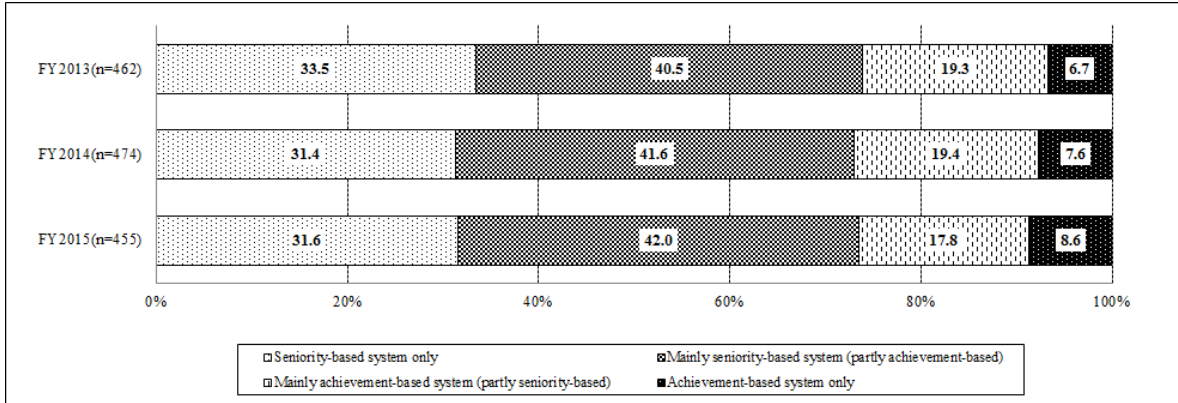
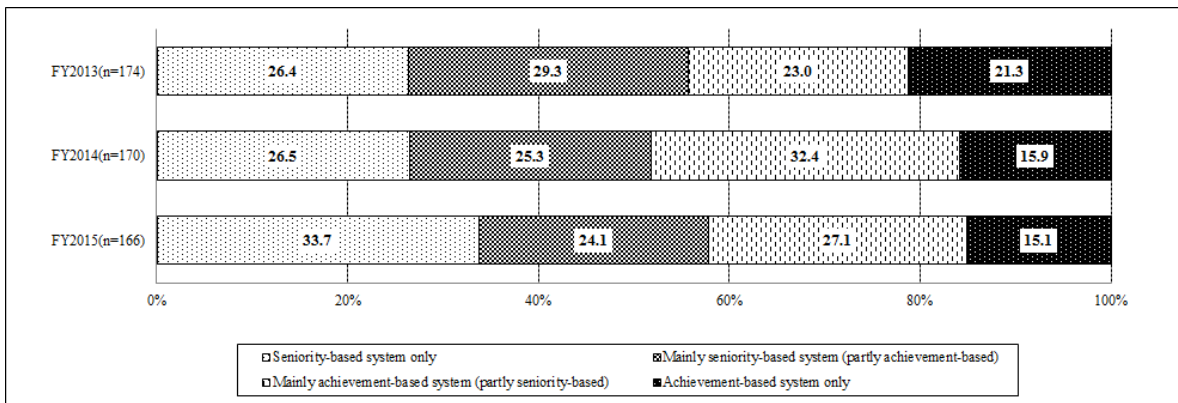


Fig. 6-25 Salary System for Contract Workers



### 11. Human resource development in the content production section

- The percentage of companies that carried out human resource development activities accounted for 89.7% (down 1.0 points). Of them, 82.6% provided “OJT (guidance and training on the job)” (down 1.2 points).

Fig. 6-26 Percentage of Companies that Carried out Human Resource Development Activities (Multiple answers allowed)

