



# **The 28<sup>th</sup> Voorburg Group Meeting on Service Statistics**

**October 7<sup>th</sup> – 11<sup>th</sup>, 2013**

**Tokyo, Japan**

**Mini-presentation**

**Programming and Broadcasting Activities in Japan**



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## 1 Definition of service being collected

The Japan Standard Industrial Classification (JSIC) has a major group “Broadcasting” which defines establishments engaged in “Programming and broadcasting activities.”

Table1 JSIC definition of groups of “Broadcasting”

Groups	Definition
3811 Public broadcasting, except cablecasting	This class comprises establishments principally engaged in non-profitmaking broadcasting services for public purposes.
3821 Television broadcasting, except satellite broadcasting	This class comprises establishments principally engaged in television broadcasting services based on advertising income or fee-paying broadcast income (including those combined with radio broadcasting services).
3822 Radio broadcasting, except satellite broadcasting	This class comprises establishments principally engaged in radio broadcasting services based on advertising income or fee-paying broadcast income.
3823 Satellite broadcasting	This class comprises establishments principally engaged in broadcasting services using broadcast or communications satellites.
3829 Miscellaneous private-sector broadcasting	This class comprises establishments engaged in broadcasting services that are not classified elsewhere.
3831 Cable television broadcasting	This class comprises establishments principally engaged in television broadcasting services based on wired telecommunications equipment (including those combined with radio broadcasting services).
3832 Cable radio broadcasting	This class comprises establishments principally engaged only in radio broadcasting services based on wired telecommunications equipment.

## 2 Standard classification structure

The Japan Standard Industrial Classification (JSIC) is composed of four stages, namely Divisions (1-digit level), Major groups (2-digit level), Groups (3-digit level), and Details (industries) (4-digit level). The Twelfth Revision is available since November, 2007.

Table 2 The structure of JSIC Rev.12 (Broadcasting)

Divisions	Major groups	Groups	Details	Name of class
G				Information and communications
	38			Broadcasting
		380		Establishments engaged in administrative or ancillary economic activities (38 Broadcasting)
			3800	Head offices primarily engaged in managerial operations
			3809	Miscellaneous establishments engaged in administrative or ancillary economic activities
		381		Public broadcasting, except cablecasting
			3811	Public broadcasting, except cablecasting
		382		Private-sector broadcasting, except cablecasting
			3821	Television broadcasting, except satellite broadcasting
			3822	Radio broadcasting, except satellite broadcasting
			3823	Satellite broadcasting
			3829	Miscellaneous private-sector broadcasting
		383		Cablecasting
			3831	Cable television broadcasting
			3832	Cable radio broadcasting

\* NHK (Nippon Hoso Kyokai, Japan Broadcasting Corporation) is the only corporation engaged in 381 Public broadcasting.

Table 3 The structure of ISIC Rev.4 (Programming and broadcasting activities)

Section	Division	Group	Class	Name of class
J				Information and communication
	60			Programming and broadcasting activities
		601	6010	Radio broadcasting
		602	6020	Television programming and broadcasting activities

Table 4 Comparing JSIC to ISIC (Programming and broadcasting activities)

ISIC rev.4	JSIC rev.12
6010 Radio broadcasting	3811 Public broadcasting, except cablecasting 3822 Radio broadcasting, except satellite broadcasting 3832 Cable radio broadcasting
6020 Television programming and broadcasting activities	3811 Public broadcasting, except cablecasting 3821 Television broadcasting, except satellite broadcasting 3823 Satellite broadcasting 3829 Miscellaneous private-sector broadcasting 3831 Cable television broadcasting

The JSIC divides Major group “38 Broadcasting” into four groups, “380 Establishments engaged in administrative or ancillary economic activities (38 Broadcasting),” “381 Public broadcasting,” “382 Private-sector broadcasting” and “383 Cablecasting,” it then subdivides 382 and 383 into television broadcasting and radio broadcasting. An establishment which is engaged in both television broadcasting and radio broadcasting is categorized as an establishment engaged in television broadcasting. Because of that, 381(only NHK which does television broadcasting and radio broadcasting is engaged in) isn’t divided into television broadcasting and radio broadcasting.

### 3 Surveys of turnover

Turnover of Broadcasting is collected by three statistical surveys, the Monthly Survey on Service Industries, the Basic Survey on the Information and Communications Industry (annual survey) and the Economic Census for Business Activities (periodic census, every five years).

#### 3.1 Monthly Survey on Service Industries (monthly survey)

The name of the monthly survey conducted in Japan is the “Monthly Survey on Service Industries (MSSI).” This survey started in July, 2008 and the results of October of the same year and every month after are released on a monthly basis. The survey objective is to identify monthly trends in sales (incomes) and persons working at the location for service industries. For

this reason, the survey covers not only Broadcasting but also a wide range of service industries<sup>1</sup>. Other than turnover information, the survey collects the number of persons working at the location of establishment<sup>2</sup>, the type of legal organization, amount of capital and so on.

The survey was revised on January, 2013. Before the revision, the survey was conducted on establishments in all industries which the survey covered. After the revision, the survey on enterprises<sup>3</sup> was introduced in addition to the survey on establishments.

The survey on enterprises is conducted on industries that do not fit a survey by sampling establishments and on enterprises with capital, investment, or funds of 100 million yen or more which highly influence total turnover. The survey on enterprises collects turnover by business activities.

The survey on establishments is conducted on establishments that do not belong to enterprises covered by the survey on enterprises.

For “38 Broadcasting,” the MSSSI covers enterprises and establishments engaged in “381 Public broadcasting,” “382 Private-sector broadcasting” and “383 Cablecasting.” Since only NHK is engaged in “381 Public Broadcasting,” it is more efficient to collect items of enterprise than establishment in regard to accuracy and respondent burden, so we conduct the survey on enterprises for “381 Public broadcasting.” For “382 Private-sector Broadcasting” and “383 Cablecasting”, the survey on enterprises with capital of 100 million yen or more and the survey on establishments are conducted.

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<sup>1</sup> Industries covered by the survey: “Information and communications,” “Transport and postal activities,” “Real estate and goods rental and leasing,” “Scientific research,” “Professional and technical services,” “Accommodations, eating and drinking services,” “Living-related and personal services and amusement services,” “Education, learning support,” “Medical, health care and welfare,” and “Services, n.e.c.”

<sup>2</sup> The term “persons working at the location of establishment” means all persons who are engaged in the business of the establishment or enterprise, etc. on the business day nearest to the end of the month (for annual survey, the end of June) (excluding dispatched or temporarily transferred employees to other enterprise, but including those who work as dispatched or temporarily transferred employees from other enterprise).

<sup>3</sup> The term “enterprise” includes a corporation (excluding foreign companies) which is conducting business activities, an establishment of individual proprietorship, a part of public enterprises, etc. operated by an enterprise and the national government or a local government.

Within the MSSSI, an expanded survey which collects more survey items from more survey entities is conducted once a year. Turnover by business activities by prefecture is collected in the expanded survey. But because there is a similar annual survey (the Basic Survey on the Information and Communications Industry, see 3.2), Broadcasting is not covered by the expanded survey.

The survey is not mandatory.

### **3.2 Basic Survey on the Information and Communications Industry (annual survey)**

The “Basic Survey on the Information and Communications Industry” is the annual survey which covers enterprises categorized as “JSIC Division G Information and communication.” Along with Broadcasting, the survey covers “Communications,” “Television program production,” “Radio program production,” “Internet based services,” “Information services,” and “Video picture, sound information, character information production and distribution.” But it doesn’t cover “Public broadcasting.”

Because this survey is conducted every year, the expanded survey of MSSSI (conducted once a year) doesn’t cover “Broadcasting.”

Along with turnover, the survey collects the number of workers, condition of affiliated company, condition of assets and liabilities, trading conditions, outsourcing status, research and development, status of possession and trading of technology.

The survey is not mandatory.

### **3.3 Economic Census for Business Activity (periodic census, every five years)**

The Economic Census in Japan is the census which covers all establishments and enterprises of all industrial sectors (except those engaged in Agriculture, Forestry and Fisheries) at the same point in time. There are two censuses in Japan. One is the “Economic Census for Business Frame” and the other is the “Economic Census for Business Activity.” The “Economic Census for Business Frame” attaches a high value to identifying establishments and enterprises and figuring out the structure of enterprises. The “Economic Census for Business Activity” attaches a high value to figuring out economic activities. Both of them are separately conducted every five years (However, the first Economic Census for Business Activity was conducted in 2012 and the next one is to be conducted four years later. After that, it is planned to be conducted every five years).

Financial items such as turnover information are surveyed by the “Economic Census for Business Activity.” This census was conducted for the first time in February, 2012. Other than turnover information, the census collects type of legal organization, number of employees, major industry of establishment, amount of cost of entire enterprise and so on.

#### **4 Unit of measurement to be collected**

##### **4.1 Monthly Survey on Service Industries (monthly survey)**

Since January, 2013 the basic measurement unit for “381 Public broadcasting” is the enterprise. For the same timespan for “382 Private-sector broadcasting” and “383 Cablecasting”, the measurement units are enterprise (for enterprises with capital of 100 million yen or more and for other enterprises) and establishment.

The turnover information collected by the SBJ is income for supply of services and sales of articles in an enterprise and establishment whose principal industry is service industry. It includes costs such as purchase amount and salary. Examples of turnover are advertising income and fee-paying broadcast income.

The survey on enterprises collects total amount of turnover and turnover by business activity<sup>4</sup> of a month.

The survey on establishments collects total amount of turnover of whole establishment of a month as turnover of the principal industry of the establishment.

Turnover by principal industry of establishment and enterprise<sup>5</sup>, and turnover by industry of business activity<sup>6</sup> are provided on a monthly, quarterly, yearly and fiscal yearly basis as the results of turnover information.

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<sup>4</sup> The SBJ collects up to four business activities of service industries which are top in turnover since January, 2013.

<sup>5</sup> Total turnover of enterprises and establishments classified into principal business activity of those enterprises and establishments.

<sup>6</sup> Since January, 2013.

Results are released by 2-digit level (including some 3-digit level for yearly and fiscal yearly basis). Results of “38 Broadcasting (monthly, quarterly, yearly and fiscal yearly),” “382 Private-sector Broadcasting (yearly and fiscal yearly basis)” are released for Broadcasting. The unit of money for turnover collected is yen, Japanese currency.

#### **4.2 Basic Survey on the Information and Communications Industry (annual survey)**

The basic measurement unit is the enterprise.

The survey collects annual turnover.

The survey collects turnover by business activities such as terrestrial television broadcasting, terrestrial radio broadcasting, satellite broadcasting and so on.

#### **4.3 Economic Census for Business Activity (periodic census, every five years)**

The basic measurement units are establishment and enterprise. The SBJ distributes questionnaires to enterprises. In the case of enterprises which have multiple establishments, the SBJ also distributes questionnaires about establishments under its control to its head quarter and asks to fill them in for the entire organization.

The annual amount of turnover information is surveyed. For each enterprise (including single-unit establishment), the total amount of turnover and turnover by industry of business activity is collected. Turnover by industry of business activity is collected at 1-digit industry level. For enterprises engaged in some industries including Broadcasting, turnover of its principal industry is captured also in more detail at 3-digit industry level and some 4-digit level (only top 10 classes).

In principle, for establishments under the control of enterprises, their principal industries are grasped by 4-digit industry level. However, because it is not possible to grasp turnover of broadcasting by establishments, they are not collected.

Collecting turnover by business activities would lead to the capture of turnover information of service industry which is conducted as secondary activities.

Preliminary results of the 2012 Economic Census for Business Activity were released in January, 2013 (by 1-digit level of all industries) and March of the same year (by 2-digit industry level of “Manufacturing”). Final results of the 2012 Economic Census for Business Activity started to be released since August, 2013. For Broadcasting, turnover by 3-digit industry level

was released in August, 2013. Total amount of turnover by principal industry of enterprises, turnover by industry of business activity including secondary industry of enterprises and so forth were released.

## **5 Market conditions and constraints**

In Japan, broadcasting is conducted by two kinds of operators, a public broadcaster (NHK, Nippon Hoso Kyokai / Japan Broadcasting Corporation) and private broadcasters.

NHK conducts television broadcasting, radio broadcasting and satellite broadcasting and is funded by receiving fees. Every owner of a television set is required by law to pay the appropriate receiving fee.

Private broadcasters are based on advertising income purchased by enterprises, etc. or subscription fees (admission fee, monthly fee, pay-per-view fee, etc.) purchased by the audience of fee-paying broadcast.

Public broadcaster (NHK) is classified as “381 Public Broadcasting.” Out of private broadcasters, terrestrial broadcasters and satellite broadcasters are classified as “382 Private-sector Broadcasting,” and cable broadcasters are classified as “383 Cablecasting.”

### **5.1 History of Broadcasting in Japan**

Broadcasting in Japan started in 1925 with the start of radio broadcasting. In March, 1925, the predecessor of the present-day NHK started radio broadcasting. In 1951 the first private broadcaster started radio broadcasting.

Television broadcasting started in February, 1953 by NHK (public broadcasting based on receiving fee) and in August of the same year, private broadcasters started broadcasting. In 1955, cablecasting started broadcasting to address trouble in viewing terrestrial broadcasting. Satellite broadcasting started in 1989. Digital broadcasting partly started in December, 2003 and in March, 2012, transmission from analog to digital broadcasting was completed.

Broadcasting is a business activity operated by a licensing system (partly by notification system). In 2011, the relevant laws were revised to make the system which relates to entry more consolidated and flexible.

After the start of satellite broadcasting in 1989 and easing of regulations on cablecasting which started in 1993, turnover of fee-paying broadcast has been on the increase.

The year after NHK started satellite broadcast in 1989, private fee-paying satellite broadcast started. Though cablecasting started in 1955, the spread of viewing cablecast only really expanded after 1993 because the easing of regulations started with elimination of regulation on service territories (only local operators were allowed to cast in a specific area) and diversification of programming advanced. The proportion of turnover by fee-paying broadcast accounts in turnover of whole broadcasting appears to have been increasing.

## 5.2 Number of enterprises and establishments

According to the results of the Economic Census for Business Activity which was conducted as of the 1<sup>st</sup> of February, 2012, the number of enterprises engaged in “38 Broadcasting” is 881 and the number of establishments engaged in broadcasting is 1808 (including “380 Establishments engaged in administrative or ancillary economic activities”). The percentage of “38 Broadcasting” accounts in all industries is 0.02% for enterprises and 0.03% for establishments. Breakdowns are shown in Table 5.

Table 5 The number of enterprises and establishments engaged in “38 Broadcasting”  
on the 1<sup>st</sup> of February, 2012

JSIC Groups	JSIC Industries	Enterprises	Establishments
381 Public broadcasting, except cablecasting	3811 Public broadcasting, except cablecasting	1	79
382 Private-sector broadcasting, except cablecasting	3821 Television broadcasting, except satellite broadcasting 3822 Radio broadcasting, except satellite broadcasting 3823 Satellite broadcasting 3829 Miscellaneous private-sector broadcasting	509	789
383 Cablecasting	3831 Cable television broadcasting 3832 Cable radio broadcasting	371	934

(Source: Economic Census for Business Activity by SBJ, METI)

### 5.3 Turnover and number of persons working at the location of establishment

According to results of the Economic Census for Business Activity, the percentage of “38 Broadcasting” that accounts in all industries in annual turnover of 2011 is 0.30%.

In the MSSSI, turnover information and number of persons working at the location of establishment for “38 Broadcasting” are tabulated.

Annual turnover of “38 Broadcasting” in 2012 is 3.6 trillion yen and the number of persons working at the location of establishment (annual average) is 77 thousand. Annual turnover decreased for two consecutive years since 2010.

Table 6 Turnover and number of persons working at the location of establishment for “38 Broadcasting”

	Turnover (million yen)		Number of persons working at the location of establishment
	38 Broadcasting	382 Private-sector broadcasting (proportion of 382 to 38)	38 Broadcasting
2009	3,911,431	2,499,476 (63.9%)	77,037
2010	4,030,502	2,555,963 (63.4%)	79,034
2011	3,646,400	2,205,595 (60.5%)	79,086
2012	3,555,896	2,200,224 (61.9%)	76,765

(Source: MSSSI by SBJ)

\* Attention needs to be paid when comparing the change over the year because the method estimating the sales (income) was improved in April, 2009.

\* Until 2012, total turnover of establishments whose principal industry was broadcasting were collected and tabulated.

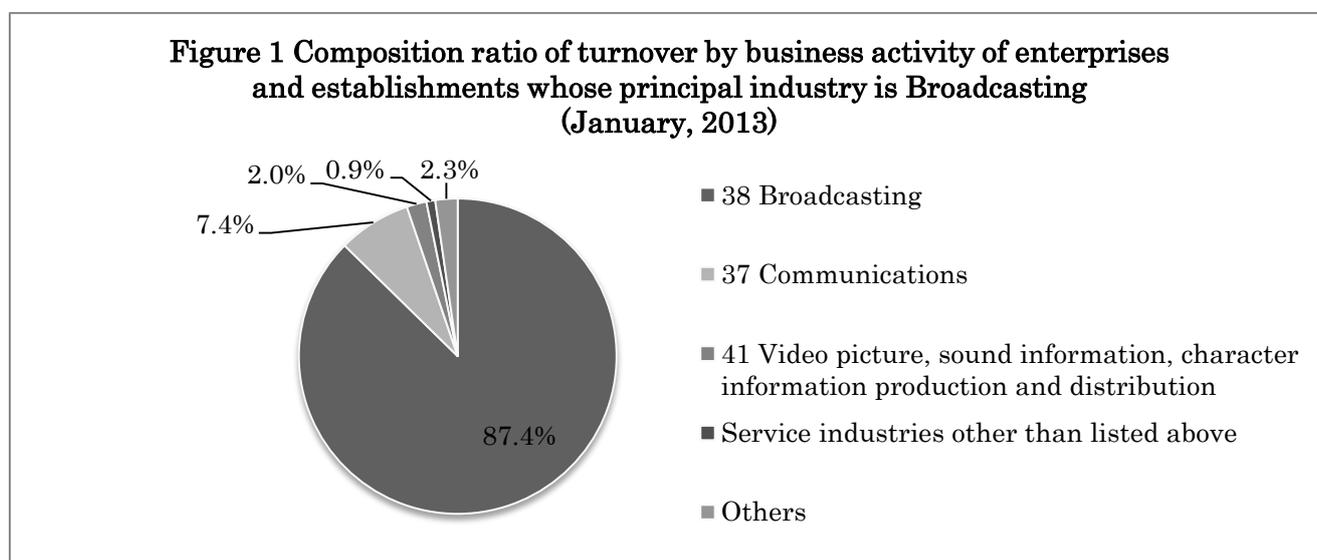
The MSSSI has results of “382 Private-sector broadcasting” as breakdown of “38 Broadcasting.” “382 Private-sector broadcasting” accounts for about 60% of turnover of “38 Broadcasting.” Though the proportion of “382 Private-sector broadcasting” to “38 Broadcasting” decreased for two consecutive years after 2009, it increased 1.4 percent point in 2012.

By the revision of MSSSI in January, 2013, the SBJ came to be able to grasp turnover by business activity in addition to turnover by principal industry of enterprises or establishments<sup>7</sup>. Table 7 shows the breakdown of turnover by business activities of enterprises and establishments whose principal industry is “38 Broadcasting” from final results of January, 2013.

Table 7 Turnover by business activity of enterprises and establishments whose principal industry is Broadcasting (January, 2013)

Industry of business activity	Turnover (million yen)	Composition Ratio (%)
38 Broadcasting	288,938	87.4
37 Communications	24,555	7.4
41 Video picture, sound information, character information production and distribution	6,696	2.0
Service industries other than listed above	2,964	0.9
Others	7,501	2.3
Total	330,654	100.0

(Based on MSSSI by SBJ)



(Based on MSSSI by SBJ)

<sup>7</sup> Total turnover of enterprises and establishments classified into principal business activity of those enterprises and establishments.

#### **5.4 Diversification of Broadcasting**

In 1996, cablecasters started to provide wired internet-access. To address broadbandization, the use of optical communication lines for trunk line and wider bandwidth of transmission capacity are proceeding. Nowadays many cablecasters double also as internet providers.

Due to the digitalization of broadcasting and the easing of regulations, receiving broadcast through the internet (IP retransmission of digital terrestrial broadcasts and IP simulcast radio) became possible and broadcast for mobile terminals (terrestrial digital broadcast for mobile terminals and multimedia broadcast for smartphones) started. Therefore, ways of consuming media content has become more diverse.

Also, accessing content by video-on-demand through the internet with PC or TV (categorized as “JSIC4012 Application services providers” of “JSIC40 Internet based services”) has become popular.

In terms of media content, the focus is moving away from watching programs according to program listings with dedicated machine (TV) to watching programs anytime, anyplace, using a wide array of devices (tablets, smartphones etc.)

On the other hand, smart televisions became available and with those, the public gained the ability to browse websites and video sites, and use social media on their TVs.

Along with diversification of business activity of enterprises, grasping the picture by business activity become more important.

#### **6 Evaluation of standard vs. definition and market conditions**

To reflect the change of industrial structure, the JSIC is revised at certain intervals.

At the present moment, there is no apparent problem with the JSIC. In the future, it may become necessary to revise with proceeding of convergence in broadcasting and communications.

## 7 Turnover data methods and criteria for choosing various output methods

### 7.1 Monthly Survey on Service Industries (monthly survey)

The MSSSI is a sample survey. The survey frame is the results of the “2009 Economic Census for Business Frame (the census was conducted for the first time in 2009).”

Within the MSSSI, the survey on establishments and the survey on enterprises are conducted (See 3.1).

The survey on enterprises is an inventory survey. The survey on establishments selects survey entities by stratified sampling by industries and number of persons working at the location of establishment.

Questionnaires are distributed and collected by mail in principal. However, for some situations enumerators collect questionnaires by visiting survey entities whose questionnaire have not been sent back and if the number of persons working at the location of establishment is ten or less. If the survey entity desires so, they can submit the filled out questionnaires via internet.

Results are tabulated as total of the survey on enterprises and the survey on establishments.

The figures are estimated by multiplying the reciprocal of the sampling fraction according to the 2009 Economic Census for Business Frame.

If missing values occur, the estimated value of each enterprise and establishment are used for tabulation.

Estimated values are calculated as follows.

- Estimation of turnover of the first month of the survey

(1) If annual turnover of the entity is available by other information (e.g. disclosed information of the entity),

Estimated value = annual turnover (other information) / 12 \*seasonal adjustment

(2) If there is no available information of annual turnover

Substitute annual turnover which is obtained by the formula set forth below into the formula presented in (1)

Annual turnover = annual turnover per person of the stratum concerned \* number of persons working at the location (information from 2009 Economic Census for Business Frame, etc.)

- Estimation of turnover of the second month and after

Turnover of previous month is multiplied by relative change (average rate of the relative change during the last two months calculated by industries and number of persons working at the location of establishment using information of collected questionnaire)

The preliminary results are released two months after the survey month and the final results are released five months after the survey month.

## **7.2 Basic Survey on the Information and Communications Industry (annual survey)**

The survey is conducted on all of the private-sector broadcasters and cable television broadcasters with 30 million yen or more of capital or investments. Public broadcaster is not covered by this survey.

Questionnaires are distributed by mail and collected by sending back or through the internet.

## **7.3 Economic Census for Business Activity (periodic census, every five years)**

Questionnaires are distributed and collected for single-unit enterprises by enumerators and for multi-unit enterprises by mail by the relevant authorities (entrusted private enterprise). If the multi-unit enterprise desires so, they can submit the filled out questionnaires via internet.

During the 2012 Economic Census for Business Activity, turnover of all enterprises and establishments of broadcasting were collected for the first time.

Preliminary tabulations were released in January and March, 2013. Final tabulations started to be released in the end of August, 2013. Along with turnover, expenses, amount of capital investment, amount of value added and so forth were released, and that enables a more detailed grasp on the current status of economic activity of enterprises conducting broadcasting.

## 8 Evaluation of comparability of turnover data with price index practices

In Japan there are two price indices monitoring the service industry: the Consumer Price Index (CPI) by the Statistics Bureau of Japan (SBJ) and the Corporate Services Price Index (CSPI) by the Bank of Japan. Both CPI and CSPI are available for Broadcasting.

Turnover data is on industry basis, whereas price indices are on product (item) basis.

### 8.1 CPI

The items of the CPI are as shown in Table 8.

The weight for the CPI is calculated by household consumption expenditure obtained from the Family Income and Expenditure Survey, so turnover data is not used for weighting.

Table 8 CPI items for Broadcasting

Charges for NHK TV license
Charges for cable TV license
Charges for other TV license

\*"Charges for other TV license" are the charges for fee-paying satellite broadcast.

### 8.2 CSPI

The items of the CSPI are as shown in Table 9.

In principle, weights for CSPI assigned to each item are based on the transaction values of service products during the base year 2005 within the "Total of intermediate sectors," "Gross domestic fixed capital formation," and "Consumption expenditures outside households" of the "Input-Output Tables (I-O Tables). Turnover collected in the MSSSI, etc. is not used for calculation of the weights.

In addition, "advertising income" is not included in weights of the CSPI for "Broadcasting." In the CSPI, "advertising rate" included in "inter mediate sectors" of "Broadcasting" is covered in the Major group "Advertising services."

Table 9 CSPI items for Broadcasting

Item	Surveyed prices
Public broadcasting	Monthly receiving fee 1) terrestrial television broadcast 2) satellite television broadcast
Private broadcasting	Monthly fee 1) satellite television broadcast 2) satellite radio broadcast
Cable broadcasting	Monthly fee 1) cable television broadcast 2) cable radio broadcast

## 9. Summary

The JSIC is used as a classification for Broadcasting. The classes for this industry in the JSIC are more detailed than those in the ISIC.

Turnover for Broadcasting is tabulated at 2-digit industry level every month by the MSSJ. The SBJ revised the survey methods of the MSSJ in January, 2013 to improve the accuracy of the turnover results. By the revision, the survey on enterprises was introduced to survey on Broadcasting in addition to the survey on establishments. Therefore, we can grasp turnover by industry of business activities of the enterprises whose primary industry is Broadcasting.

In the future, grasping the condition by industry of business activities will become more important along with diversification of business activities of enterprises. The MSSJ has just started to grasp turnover by industry of business activities and the SBJ will continue to focus on it.

During the 2012 Economic Census for Business Activity, turnover of all enterprises and establishments of Broadcasting were collected for the first time. Along with turnover, expenses, amount of capital investment, amount of value added and so forth were released, and that will enable a more detailed grasp of the current status of economic activity of enterprises conducting Broadcasting.

The SBJ will continue to work on further analyses and solve challenges by applying the characters of each statistical survey related to turnover of Broadcasting.