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Akira Shimizu

New Consumer Behavior Theories from Japan

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Preface

Modern marketing was first introduced to Japan from the United States in the 1950s. Especially as consumers' disposable income increased with Japan's rapid economic growth and they were able to choose products according to their own preferences, the concept of marketing was seen as important in differentiating one's products from those of other companies, and was adopted by many companies. Japanese consumer electronics and automobile manufacturers have been successful in their overseas expansions by analyzing consumer preferences and product distribution channels in detail, precisely because they practice marketing. At universities, marketing is considered a core subject, along with business administration and accounting, in faculties such as business administration and commerce, and many young people are studying marketing before entering the workforce.

Thus, in Japan, marketing has penetrated companies and consumers in just less than 70 years since it was introduced, and it has achieved a great deal of success both domestically and internationally. However, Japanese marketing research has rarely been introduced to foreign countries or attracted the attention of foreign companies and researchers. This is in contrast to business administration, which, like marketing, was introduced from the United States and is now being studied under the title "Japanese-style management," and is also attracting attention overseas.

In the course of this research, I have learned that there are many phenomena in the Japanese market that cannot be explained by foreign theories and that it is possible to construct a new marketing theory that takes advantage of the characteristics of the Japanese market, especially Japanese consumers.

With this in mind, this book was originally published by Chikura Shobo in Japanese and has been modified to make it suitable for use overseas. I am very grateful to Chikura Shobo for his willingness to allow this book to be published in English. During the writing of the English version of the book, the professors on the editorial board gave me specific advice and helped me to elevate the book to greater sophistication. I am grateful to them for doing so and thereby enabling the book to be accepted overseas.

I am also very grateful to Ryuzo Sato, Editor-in-Chief of the Advances in Japanese Business and Economics book series, for giving me the opportunity to write this book. No matter how much one has proposed an original theory in Japan, it will remain unnoticed by overseas researchers if it has not been published in English. I would like to repay Professor Sato for his kindness by using this book as an opportunity for me to play an active role overseas.

Finally, I am grateful to Juno Kawakami of Springer for her help in editing this book.

Tokyo, Japan Akira Shimizu

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About the Author

Akira Shimizu joined the Faculty of Commerce at Keio University as a Professor of Marketing in April 2009. Before joining Keio University, Prof. Shimizu worked at Meiji Gakuin University as an assistant professor from 1991 to 1993, an associate professor from 1994 to 1999, and a professor from 2000 to 2009. He received his B.S. (1986) and M.S. (1988) in marketing from Keio University, and also his Ph.D. in marketing from the Graduate School of Commerce at Keio University (2004).

Professor Shimizu's research focuses on consumer behavior and marketing strategy, with particular interest in the decision-making process of consumers, sales estimation using innovative consumers, and applying consumer behavior theories for marketing strategy.

He received the Best Book Award from the Japan Society of Marketing and Distribution in 2005, and also the Best Paper Award at the Global Marketing Conference in 2012 and 2018.

Professor Shimizu was the former Chief Editor of the *Journal of Marketing and Distribution*, published by the Japan Society of Marketing and Distribution, and the former President of the Japan Association for Consumer Studies.

Chapter 1
Japanese Consumers and Media Usage

The environment in which we live, particularly the way we access the media and obtain information, has changed considerably since the advent of the Internet. It is quite evident that this environmental change could significantly affect the formulation of marketing strategies in terms of targeting consumers and their behaviors. Using various types of data, this chapter will explain the facts associated with and changes in the way Japanese consumers access the media.

1.1 Media Usage Among Consumers

First, an overview of the current usage of four existing media, i.e., TV, newspaper, radio, and magazine, will be provided.

The National Media Access and Evaluation Survey, a large study conducted once every two years by the Japan Newspaper Publishers & Editors Association (Nihon Shinbun Kyokai or NSK), indicates that the most frequently used media by Japanese people is TV.[1] Those who watch TV everyday account for 86.6% of the overall population. The proportion is the lowest at 73.2% among those in their 20s, but is higher at 96.4% among those in their 70s. The average daily viewing time was 201.6 min for the overall population. The average viewing time, which is the lowest at 149.9 min among those aged 15–19, increases as people become older and is the highest at 247.8 min among those in their 70s. However, when the average is drawn regardless of age, people watch TV for about three hours a day. Since the survey conducted four years prior to this one showed that 89.1% of the respondents watched TV every day and the average viewing time was 209.0 min, we can say that there are still several people who watch many hours of TV.

Although 49.1% of the respondents said that they read newspapers (morning edition) every day, the percentage was extremely low at 13.2% among those aged 15–19. The survey conducted six years ago showed that 30.0% among those aged 15–19 read newspapers every day, indicating that younger people are moving away

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from newspapers. Conversely, the percentage of those who subscribe to newspapers every day is 86.2% among those in their 70s, showing a large variance in terms of age group. Similarly, since 62.7 and 60.7% of them were reading newspapers every day according to the survey conducted four years ago and six years ago, respectively, it can be said that the percentage of newspaper readership is declining rapidly, mainly among younger people.

For magazines, 35.2% of the respondents were not interested in reading them, and the percentage was extremely high at 55.1% among those aged 15–19. The survey conducted six years ago showed that 21.2% of all respondents and 22.5% of those aged 15–19 did not read magazines. Similar to newspapers, it can be said that the percentage of magazine readership is also declining rapidly, mainly among the younger generation.

The overall average time spent listening to the radio is 94.8 min per day. Similar to newspapers, the difference by age group is large, as the average is 56.3 min among those in their 20s and 103.2 min among those in their 60s. Since the overall average in the survey conducted six years ago was 96 min, the time spent on listening to a radio has not changed much.

A trend similar to the one described above was observed in a survey conducted by Yomiko Advertising Inc.[2] According to this survey, only 1.9% of the respondents do not watch TV on weekdays; in other words, almost everyone is watching TV. Moreover, 43.8% said that they watch TV for more than three hours per day. The data on viewing time by age group is also similar to the results obtained by the NSK: 51.6% of men in their 70s and 68.9% of women in their 70s said that they watch TV for more than three hours per day on average. These figures almost match those of a similar survey conducted four years ago. With regard to newspapers, 40.2% people said that they do not read newspapers; this figure is lower than the 30.2% figure recorded four years ago. This factor differs in the NSK survey. However, the data by age group shows that while 13.9% of men and 16.1% of women in their 70s do not read newspapers, the figures are 60.8 and 69.6% for men and women in their 20s, respectively, indicating that younger people are largely moving away from newspapers. Those who do not read magazines account for 56.2% of the population. Around 61.1% of men in their 70s do not read magazines, while 57.5% of men in their 20s do not read magazines. Considering the fact that 43.0% were those who do not read magazines according to the 2012 survey, we can say magazine readers are definitely decreasing as well. The overall percentage of those who do not listen to radio is 63.9%. Things have not changed much for radio as, according to the 2012 survey, 61.4% were those who do not listen to it.

Although there are slight differences in the figures cited in the NSK survey and the Yomiko survey, the overall trend in the demographic attributes of media users is similar. In other words, TV is a medium watched by many people regardless of age and Japanese people are watching it about three hours per day on average. As for time spent listening to radio, it has not changed much in the past several years. The figure that is declining greatly is the proportion of those who read newspapers and magazines. Although they are still well read among older people, a considerable percentage of younger people are moving away from newspapers. Likewise, the percentage of people who do not read magazines has increased a lot in the past several years. In other words, paper-based media is declining mainly because younger people have stopped reading them.

Next, the study will explore in detail the reality of Internet usage.

According to a white paper on information communication published by the Ministry of Internal Affairs and Communications (MIC), the Internet user population was over 100 million at the end of 2016, with a penetration rate of 83.5%.[3] Since the Internet penetration rate was only 9.2% when the same survey was conducted in 1997, we can see that the penetration rate has grown significantly during the past two decades. The breakdown of devices used for accessing the Internet is as follows: Personal Computer (PC) 58.6%, smartphone 57.9%, and tablet 23.6%. While the figures for PC and smartphone are vying with each other, smartphone has by far shown a higher growth rate and is expected to surpass the PC figure by next fiscal year. The Internet usage rate by age group exceeds 95% among those aged 13–49, is 93.0% among those in their 50s, 83.3% among those in their early 60s, and 53.6% among those in their 70s. This shows that Internet usage is quite common among people in their early 60s and below, and is lower among people in their late 60s and above. The Internet usage has not changed much among those aged 49 or younger compared to five years ago; however, we can see it has dramatically increased among older segments, considering it was 70.1% among those in their early 60s and below and 39.2% among those in their early 70s.

According to the NSK survey, 54.9% are using the Internet every day, which is an increase of more than 10% points over 44.4% five years ago. In line with the white paper on information communication, while 85.8% of those in their 20s are using the Internet every day, the rate is 54.8 and 36.5% among those in their 50s and 60s, respectively. We can see that the variance by age group is large and the Internet is a medium that is regularly used by younger people. Likewise, the Yomiko Survey shows that 77.1% of men and 71.3% of women use the Internet on weekdays. Furthermore, the corresponding proportion is 94.8 and 94.6% for men and women in their 20s and merely 59.2 and 39.6% for men and women in their 60s. Considering this in conjunction with the survey conducted by the MIC, we can say that the Internet has not become a part of the daily lives of older people, even though the penetration rate among them is high.

The Internet is gaining attention not only for its penetration rate but also for the overwhelming volume of information it provides.[4] The Institute for Information and Communications Policy of the MIC measured and compared the volume of information each media provided in FY 2001 to the volume in FY 2009. Albeit being slightly old data, according to their report, while broadcasting and postal mail have grown by 1.98 times and 2.57 times, respectively, the volume of information offered by the Internet has actually grown by 71.63 times in the past decade or so. In terms of the actual volume of consumption, the Internet has grown by 2.37 times while the broadcast and postal media have only grown by 1.04 times and 0.90 times, respectively. This indicates that the actual consumption of information on the Internet—the level of consumers' dependency on the Internet—is increasing in addition to the amount of information circulated by the Internet relative to other media.

Next, of all information on the Internet, this study will examine the ones posted by individuals. In its white paper on information, the MIC looked at six SNSs that can be compared over the years, namely LINE, Facebook, Twitter, mixi, Mobage, and GREE, and studied the changes in their usage rates. Based on this, it became clear that the percentage of people who use one of these six SNS s has increased from 41.4% in 2012 to 71.2% in 2016 in conjunction with the spread of smartphones. Looking at it by age group, 81.3% of those in their 20s were already using some sort of SNS as of 2012 and, as the figure reached 97.7% in 2016, it became clear that almost everyone was using SNS. The growth rate was higher among those in their 40s and 50s; while their usage rate was 37.1% and 20.6%, respectively, it had risen to 78.3% and 60.8%, respectively, by 2016. SNS, therefore, is no longer just a tool for young people.

Among those six SNSs in question, the one for which the usage rate increased the most from 2012 to 2016 was LINE: its overall rate rose from 20.3 to 67%. It was followed by Facebook (16.6–32.3%) and Twitter (15.7–27.5%). While LINE is used evenly by all age groups, from those in their 10s–40s, Facebook is most used by those in their 20s and 30s and Twitter is most used by those in their 10s and 20s. The remaining three SNSs—mixi, Mobage, and GREE—are not used much today. Instead, the usage rates have increased for SNSs such as Google+ and Instagram. As of 2016, their overall usage rates are 26.3% and 20.5%, respectively. It is characteristic that the usage rate of Instagram is remarkably high among those in their 20s (45.2%) while Google+ is used regardless of age.

Changes in the penetration rate of each media over time are shown in Figs. 1.1 and 1.2. These charts are cited from the "Study on Communication Touchpoints" included in the Media Value Survey conducted by Dai Nippon Printing Co. every year since 2001. Figure 1.1 shows the changes in the media usage rates and Fig. 1.2 shows the changes in channel usage rates. From Fig. 1.1, the percentage of Internet users has increased from 41% in 2002 to 95% in 2016 and the usage of mobile phone Internet has grown at an extremely rapid rate: the usage rate of mobile phone Internet has increased from 31% in 2003 to 92% in 2016 and that of SNS has increased from 50% in 2010 to 75% in 2017. Meanwhile, comparing the years 2002 and 2016 in terms of the four traditional media types, the usage rate has not declined dramatically for TV, although the usage rate of radio, newspapers, and magazines has declined by 10% points. In particular, the figure declined drastically for newspapers as it reached 60% in 2016 even though 90% of people were accessing newspapers in 2002. In other words, people are still using these media except newspapers at a high rate even though Internet usage rate has risen, and it is unlikely that they will be replaced by the Internet. From the previously discussed results of the NSK and Yomiko studies, we can see that although the time spent on these three media has definitely declined, the drop is small. Furthermore, we can conclude that the Internet is spreading today because people are using it along with other media or spending time on the Internet by redirecting other spare time, and not because they have stopped using other media and redirected that time to use the Internet. However, as far as the younger generations are concerned, the decline in the newspaper and radio usage has been drastic, and it seems that the Internet is in fact replacing these media.

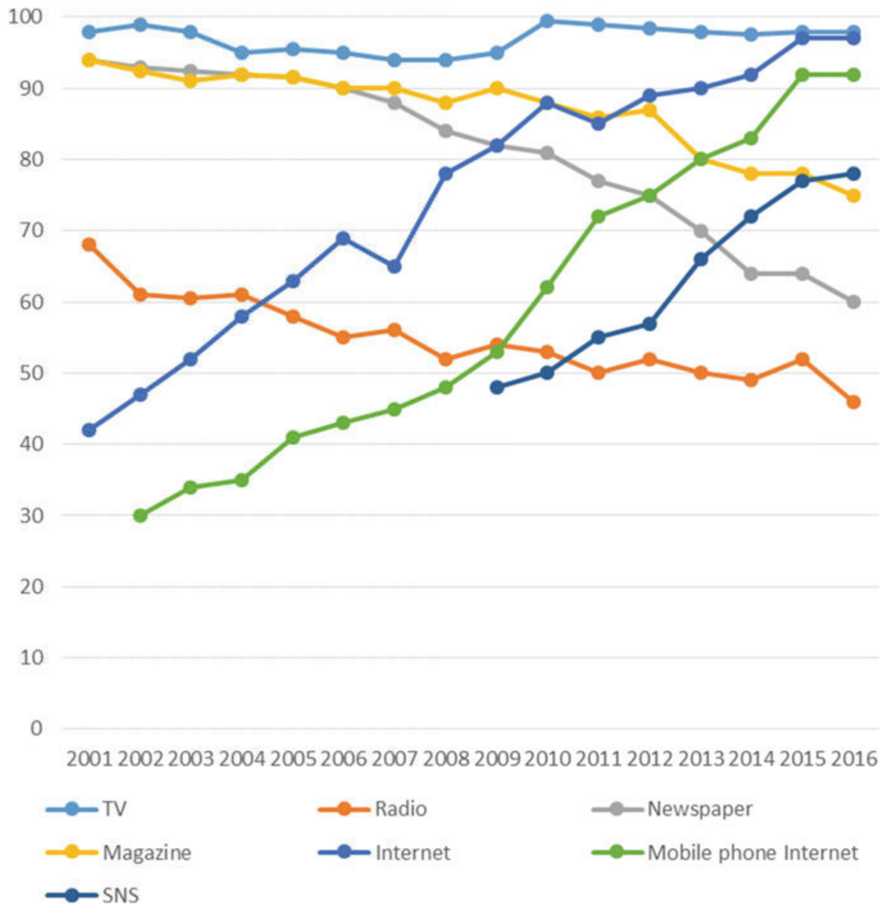

Fig. 1.1 Changes in media usage rate

Next, we can see from Fig. 1.2 of Internet-related channels has gradually increased since 2001 when the survey began. Online shopping has increased from 15% in 2001 to 49% in 2016 and mobile shopping has increased significantly from 7% in 2001 to 48% in 2016. Since the usage rate has declined drastically for department stores and specialty retailers, from 83% in 2001 to 65% in 2016 and from almost 98% in 2001 to 75% in 2016, respectively, while supermarkets and convenience stores maintained high usage rates of more than 90%, it seems that the places for purchasing the kind of products sold at department stores and specialty retailers have shifted to Internet-related channels.

As described, the spread of the Internet has increased its importance not only as a means of collecting information but also as purchasing channels.

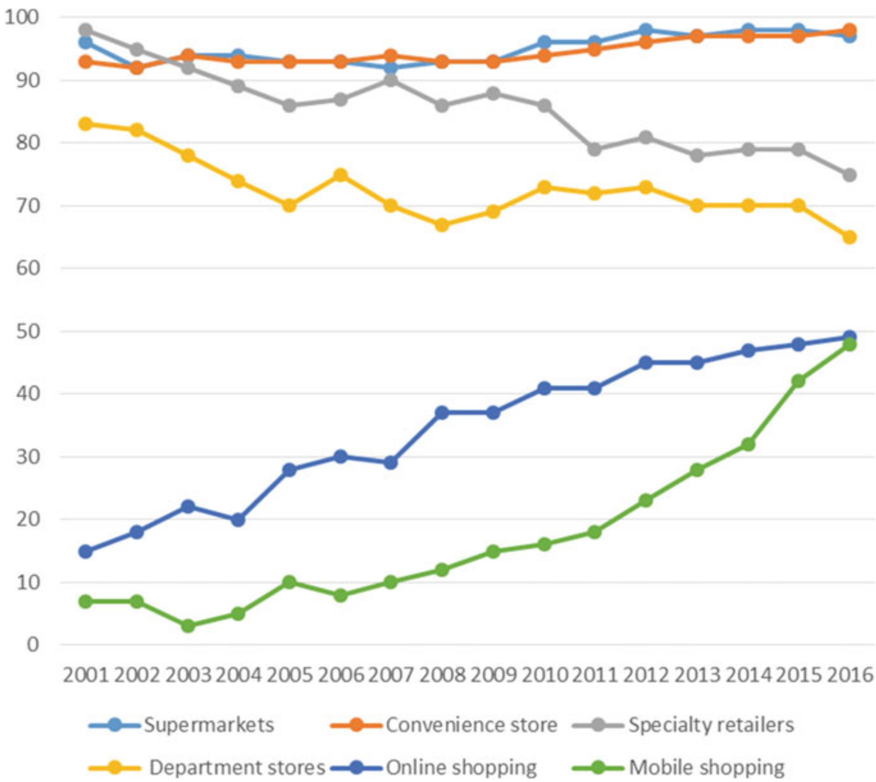

Fig. 1.2 Changes in channel usage rate

1.2 The Way Consumers Use Different Media for Different Purposes

As explained, the Internet usage rate has increased exponentially in the past 15 years, we can surmise that the Internet will be an alternative to TV, newspapers, radio, and magazines. Though the time spent on these traditional media has decreased, their usage rates have not decreased drastically except among younger generations. This is because many consumers are choosing a different media for different purposes.

According to a joint study conducted by the author with NSK in 2006 regarding the way the Internet and traditional media are used differently according to the purpose, although people use the Internet when they "learn more about the products and other things that I become interested in (61.4%)," "obtain information that is useful for my hobby (67.8%)," and so on, what prompts them to notice a product is newspapers (40.2%), company websites (35.6%), TV (31.3%), and consumer review sites (19.8%). Back then, the Internet was a media for researching about a product; although the information disseminated by manufacturers was used at the time of

Table 1.1 Consumer decision-making process and media contact

	Utilization ratio	Product recognition and interest	Searching about the product	Considering the purchase
Newspaper articles	58.1	20.9	7.9	6.3
Newspaper ads	36.8	25.3	10.5	8.6
TV programs	70.8	38.5	8.9	7.6
TV commercials	60.6	55.7	10.6	11.8
Radio	17.8	6.7	1.4	1.2
Magazines	21.3	18.8	9.5	6.8
Company websites	10.5	6.8	25.3	14.7
Banner ads	9.1	8.1	11.5	6.1
Consumer review sites	15.1	11.6	23	18.3

product recognition, the influence of SNS was relatively small.[5] Newspapers and TV still had the influence during the stage of product recognition and the Internet was often used for learning more about those products.

A summary of the different uses of media in consumers' each decision-making process, which was prepared based on the aforementioned 2011 NSK survey, is provided in Table 1.1. It indicates that while newspaper articles, newspaper ads, TV programs, and TV commercials are more likely to prompt product recognition and interest, when it comes to the stage for searching about the product and considering the purchase, the use of Internet sites such as company websites and consumer review sites increases. Although the direct comparison of the data is not possible because the survey methods differ, the overall structure has not changed much since 2006. However, the usage rate of consumer review sites, as a medium that prompts interest, has reached the same level as that of the Internet for researching about products and referencing during purchase, indicating that people are beginning to use the Internet as a medium for finding new products rather than just for researching.

Table 1.2 shows the same summary for those aged between 15 and 29. It indicates that the effect of TV programs and commercials on product recognition and interest is about the same as the overall data; however, the role of newspaper articles and ads is very low compared to the overall data and the role of magazines and consumer review sites is very high instead. Specifically, the usage of consumer review sites is very high in all decision-making stages among younger people, indicating that such sites have become very important sources of information for them.

Based on these results, we can see in general that even though the relative importance of the four traditional media types has declined, consumers are using different media for different purposes and actually consider TV, newspapers, and magazines unnecessary for those aged over 30. However, it has also become clear that the younger people are more dependent on SNS among all the Internet media. Also, we should note that the use of consumer review sites as a media to first notice a

Table 1.2 Consumer decision-making process and contact (under 30)

	Utilization ratio	Product recognition and interest	Searching about the product	Considering the purchase
Newspaper articles	29.9	8.9	3.9	2
Newspaper ads	17.7	11	4.2	3.2
TV programs	73.3	46.1	13.5	7.7
TV commercials	67.6	58.4	12	9.9
Radio	11.3	3.8	2.1	1.4
Magazines	32	31.4	14.6	10.1
Company websites	15.2	11.6	34.7	20.6
Banner ads	19.8	14.7	15.3	8.7
Consumer review sites	42.3	32.3	45.2	37.4

product has been increasing recently across all aged segments. As is clear from the above summary, instances in which young people use SNS are increasing. In particular, since the survey was conducted 10 years ago, the use of the Internet and social networking sites is likely to be on the rise among a larger number of generations today. Here, the big difference is the fact that they are using SNS not only to search for information but also to find a new product.

1.3 Changes in Consumer Clusters Over Time

As described earlier, the media usage among consumers has changed due to the emergence of the Internet. However, all consumers are not exclusively using the Internet-based media; the existing media are still used in parallel, especially over 30 years old. It is probably reasonable to think that the emergence of the Internet has increased the patterns for using different media for different purposes.

Therefore, by using the data collected in the aforementioned *Media Value Survey* and dividing the consumers into clusters, I have analyzed how consumer categories based on the way they use media change over time. *The Media Value Survey* investigates the usage rates and average days of use per four weeks for 18 media. Clusters were created based on the usage rate of these 18 media. Figures 1.3, 1.4, and 1.5 show the survey results for FY 2002, FY2012 and FY 2017, respectively.[6] Of these, the usage rate of the network media—or the Internet-based media—is shown on the vertical axis, while the usage rate of the mass media is shown on the horizontal axis and the number of people belonging to a given cluster is shown by the size of the circle.

For FY 2002, when the Internet penetration rate was about 50%, six clusters were created. The first "network media" type is a cluster of consumers with a high Internet-based media usage rate and a high rate of information access, accounting

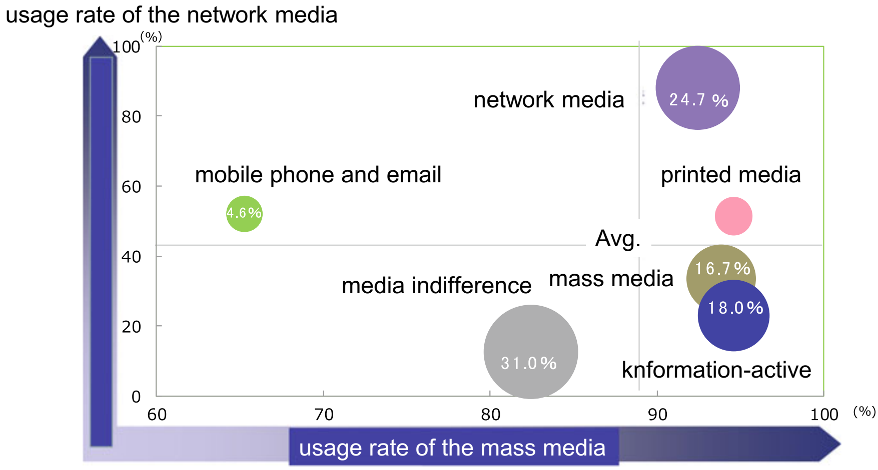

Fig. 1.3 Clusters based on the usage rate of 18 media (2002)

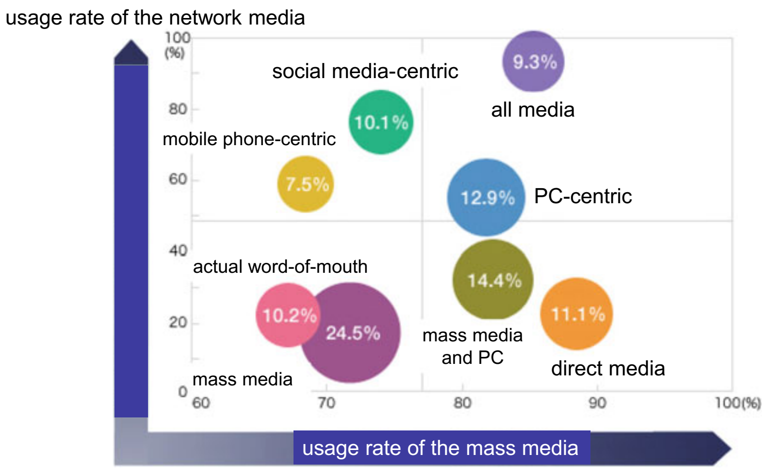

Fig. 1.4 Clusters based on the usage rate of 18 media (2012)

for 24.7% of the overall population. This is a cluster of "most up-to-date consumers" so to speak; they have no resistance to purchasing products on the Internet and are interested in new tools such as mobile devices. The "mobile phone and email" type is a cluster of consumers whose heavy use of mobile phone stands out of all Internet-based media usage. They are characterized by not being interested in other media. In terms of age group, many teenagers belong to this cluster, which accounts for 4.6% of the overall population. Following these two clusters in terms of high network media usage is the "printed media" type. Currently, they often tend to use print media such as magazines and books. Because they perceive the current information environment

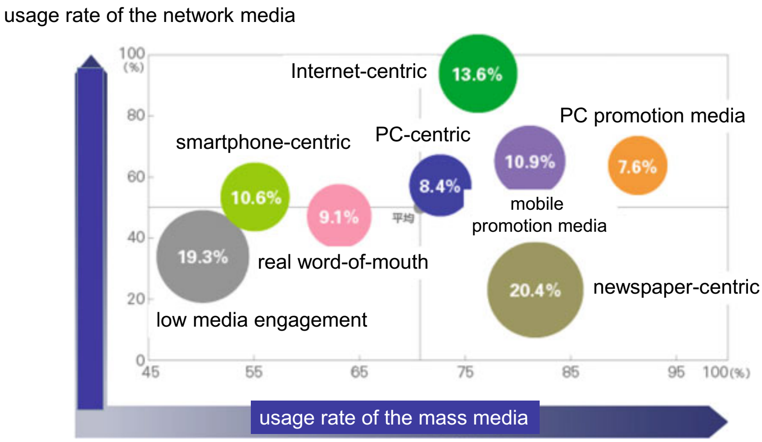

Fig. 1.5 Clusters based on the usage rate of 18 media (2017)

to be inadequate and do not spare the money to use the Internet or mobile phones, they can be considered would-be "network media" type consumers. This cluster accounts for 5.1% of the overall population. The "mass media" type has high rates of using traditional media such as TV, radio, and newspapers. The usage rate of Internet-based media among these people is <50%. The cluster, characterized by all generations of people without any particular age group bias, accounts for 16.7% of the overall population. The "information-active" type currently uses almost no Internet-based media; however, they have a high level of information access as well as intention to use the Internet. The cluster accounts for 18% of the overall population and its percentage of woman is as high as 61%. The last cluster, "media indifference" type, has a low level of interest in the Internet as well as information access and accounts for 31% of the overall population. The average age is also the highest among all these six clusters.

As also shown in the figure, the FY 2002 survey indicated that the "network media" types who use Internet-based media are also using mass media in parallel at a high rate; therefore, they can be considered a cluster with a large amount of information. As of 2002, the usage of network-based media was not high among other clusters even though their mass media usage was high. However, since the "printed media" types were dissatisfied with the current information environment and favorable toward the Internet, and the "information-active" types were also highly capable of collecting information, it seems these clusters adapted to use the Internet over time. When thinking of it this way, the reason why the usage rates are declining for magazines and newspapers can be understood.

In the 2012 survey, the population was first divided into two major clusters based on whether the individual actively uses the Internet or not and each of those clusters was then further divided into four clusters.

First, those who actively use the Internet are divided into four clusters: the "all media" type, "PC-centric" type, "mobile phone-centric" type, and "social media-centric" type. The "all media" type includes people who are the most up-to-date; this is a cluster of people who utilize not only information on the Internet but also any useful information on media such as TV and flyers. Accounting for 9.3% of the overall population, their average age is 30 and includes more men than women with the male-female ratio of 6:4. The "PC-centric" type includes many married men and women in their 40s and 50s, with the highest average age (41.6) of the four clusters of consumers who use the Internet. They are characterized by the way they obtain shopping information such as online supermarkets, online flyers, and coupons, and they shop efficiently while comparing. They account for 12.8% of the population. The "mobile phone-centric" type includes a large percentage of women at the female-male ratio of 7:3, most of which is accounted by women in their 10s and 20s. Their average age is also young at 25. They tend to collect shopping-related information and communicate only by mobile phones without using PC most of the time. Around 7.5% of the overall population falls under this cluster. While the "social media" type also includes many young people just like the "mobile phone-centric" type and the average age is the same at 25, the male-female ratio does not change. These people actively post information on SNS, microblog, video sharing sites, etc. and seek to connect with friends, but are not active in shopping. However, they frequently purchase contents such as downloadable music. The cluster accounts for 10.1% of the overall population.

Next, those who do not actively use the Internet were divided into four types: mass media, direct media, mass media and PC, and actual word-of-mouth. The "mass media" type mainly consists of men and women in their 50s and 60s. There are slightly more men in terms of composition and the average age is 47.3. Their media usage is generally low except for TV and newspaper. They are also uninterested in matters other than health and post-retirement years. Around 24.5% of the entire population falls under this cluster. The "direct media" type values information touch points such as direct mails, flyers, pamphlets, and mail order catalogs. Many of them are homemakers, and 11.1% of the overall population falls under this cluster. It consists mainly of housewives in their 50 and 60s and three-quarters of the population are women. Their average age is also the highest at 52. They are highly likely to frequent drugstores and supermarkets. In contrast, two-thirds of the "mass media & PC" type are men and they are highly likely to use TV, newspaper, and car card advertising. Their average age is 43. Around 14.4% falls under this cluster. The average age of "in-person word-of-mouth" type is 36 and two-thirds are women. Rarely using media other than actual word-of-mouth, these are people who are reluctant in posting comments. They value reputation and opinion coming from people around them and purchase what is recommended by their friends, family, and store clerks. Around 10.2% of the overall population falls under this cluster.

As it became clear here, the 2012 survey showed that (i) Internet users can be divided into four clusters, and there are digital divides among them; (ii) the clusters are divided based on whether they post information or not and whether the device is a mobile phone or PC; (iii) the "social media" type whose purpose is to connect