MEDIA AND THE JAPANESE CONSUMER IN 2019

See the current trends in media consumption and behavior in Japan.
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Welcome to the *Media and the Japanese Consumer in 2019* report from TAMKO.

In this report, we take a look at how people in Japan are currently consuming media - the channels their attention is in, the networks they’re on, and the OTT services and shopping platforms they’re using.

By getting a better sense of current Japanese consumer attention and behaviors, marketers can better strategize and plan their campaigns to have a greater impact on potential customers in a country that is often regarded as different and challenging.

This report comes from various research and surveys, most of which are in Japanese. We’ve compiled recent data and translated it for international marketers to help educate them about the Japanese market as it is today.
Attention is shifting. Significantly.

In the past few years, Japanese have been shifting away from traditional media in favor of mobile, internet channels. While it is most obvious in the Heisei generation (born 1989-present), it is also noticeable throughout every demographic under the age of 70.

This data compiled looks at the shifts occurring in media consumption within individual channels as well as overall trends.
ATTENTION SHIFT

Between 2006 and 2018, mobile internet channels - mobile phone and tablet, in particular - have seen enormous gains in attention. This has come at the expense of almost every traditional channel.
CONTACT WITH MEDIA

The amount of time per day that Japanese people are in contact with media has been steadily increasing.

In 2018, it hit an all-time high with an average of 396 minutes per day across all age groups. This is an 18 minute increase from 2017.

Mobile phone use saw the biggest increase with people spending 12.9 minutes more per day than they did in 2017. Time spend using a mobile phone was 103.1 minutes per day, an all-time high.
THE STATE OF TV

There's a decreasing general trend of TV watching by Japanese. The only age group showing an increase between 1995 and 2015 is the 70s and up demographic, and viewing time for people in their 30s and under in particular have decreased significantly.

WEEKDAY WATCHING FOR MEN

WEEKDAY WATCHING FOR WOMEN

Data uses total 1995's total watch hours as 100%
THE STATE OF TV

Japanese in their 30s and under continue to watch a decreasing amount of linear TV. 48% of Japanese under 20, 45% in their 20s and 44% in their 30s have little to no contact with TV commercials.

Linear TV consumption by Japanese jr high school and high school females average around 5 hours a week, and it was found that 1 in 6 Japanese in their late teens to twenties don’t watch TV at all.

SOURCES: 2018年上半期流行ランキング【Nomdeplume調べ】
CyberAgent テレビ接触頻度調査（ローテレ調査）、全国万人に実施
Digital media consumption via smartphone in particular is seeing an increase. Internet users who are smartphone-only are steadily growing, and Japanese females are especially smartphone-only.

### DIGITAL MEDIA CHANNELS

#### USAGE BY ACTIVE INTERNET USERS
(Usage of once/week or more, school & work included, ages 15-59)

- **Smartphone users**: 87%
- **PC users**: 43%
- **Smartphone only**: 48%
- **Sm smartphone + PC**: 38%
- **PC only**: 5%

#### DEVICE USAGE BY ACTIVE INTERNET USERS
(Usage of once/week or more, school & work included)

SOURCE: [LINE](https://linecorp.com/en)〈調査報告〉インターネットの利用環境定点調査 (2018年上期)
There’s a lot happening in “mobile.”

The mobile space may be the fastest growing channel receiving Japanese attention, but there’s a range of activities within “mobile” that people are spending time doing. Furthermore, these activities vary according to the day of the week.

Here are the activities Japanese are doing in their mobile devices.
ACTIVITIES IN MOBILE

Japanese are paying an increasing amount of attention to their mobile devices. We can see that work-related activities such as email and phone calls see decreases on the weekend while leisure activities see an increase. Social network use is the highest overall activity done.
Social is the focus.

With social network use being the highest overall activity that Japanese are doing in mobile, businesses are increasing their marketing efforts there.

We take a look at what exactly Japanese companies are using social media for, as well as break down who in Japan uses each of the major social networks.
JAPANESE BUSINESS USE

According to a survey conducted by Japan’s Ministry of Economy, Trade and Industry, around 63% of Japanese businesses currently use social media for marketing purposes. Only 2% have no plans or no interest in doing so.

Businesses utilizing social media use it for these reasons:

- Increase awareness: 88%
- Increase sales: 35%
- Customer support: 11%
- Product development: 3%

Japanese businesses providing customer support on social and messenger channels remains low.

SOURCE: 平成27年度商取引適正化・製品安全に係る事業
JAPANESE CONSUMER USE

Social network usage amongst Japanese continues to increase and is forecasted to grow by 2.1% over the next year.

While usage amongst those in their 30s and under is the norm, there’s a growing percentage of people in their 40s through 60s beginning to jump on networks.

LINE is the most used network, although it primarily acts as a messenger. It is followed by Twitter and Instagram.

People report being most satisfied with YouTube (79.7%) and Instagram (78.5%). Facebook (64.5%) and Twitter (74.9%) had the lowest satisfaction scores.

SOURCE: 2018年度 SNS利用動向に関する調査- 株式会社ICT総研
While usage of social networks has increased overall, there have been slight changes in each network’s usage over 2018.

TikTok has seen the biggest increase in usage with 72% of users polled saying they used it more in 2018 than 2017. Instagram also saw a significant increase with 54% of users saying they used it more.

The networks that apparently saw the biggest decreases were Facebook with 26% of respondents saying they used it less, and Twitter with 22% saying the same.
LINE is more of a messenger platform than a social network, and is the most used standalone messenger in Japan. Japanese generally default to the app over native apps such as iMessage.

53.1% of users are female, 46.9% are male, and 48.6% are regular company employees.*

**Monthly Active Users:** 78 million *

**Daily Active User Rate:** 85% *

*As of September 2018
Twitter remains a dominant social network in Japan. The country is Twitter’s second largest market in terms of sales.

We see little variation in usage across the different age demographics, and it is still a very relevant social network for the Heisei generation (born 1989-present).

**Monthly Active Users:** 45 million *

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*As of October 2017
Instagram is rapidly growing in Japan with its user base increasing by 9 million, or 45%, between October 2017 and September 2018.

While viewed as a female-centric network a couple years ago, male users have increased to make up around 43% of the total Japanese user base.

Stories is a favorite feature for Japanese with 70% of daily active users using it.

**Monthly Active Users:** 29 million *

**Stories per Day:** 7 million *

*As of November 2018
Facebook has been a well used social network in Japan since around 2012. Like many other countries, usage has begun to taper off in the younger demographic.

One of the usage differences between Japan and many other countries is that Japanese often use Facebook for professional networking purposes as well.

**Monthly Active Users:** 28 million *

*As of September 2017*
PINTEREST

Pinterest has been in Japan since late 2013. It is said to have several million users in the country.

SOURCE: 2018年11月更新！11のソーシャルメディア最新動向データまとめ Social Media Lab
LinkedIn has a few million users in the country but hasn’t achieved widespread use outside of the international community.

The nature of the career-centric network can be seen as mainly for new job seekers and requires some boasting of achievements - both of which go against the traditional Japanese culture of being humble and lifelong, dedicated employees.

LinkedIn’s competitors include Japan-based Wantedly.
SNAPCHAT

Snapchat has yet to penetrate the Japan market in the same way as others, but it has a few million users in the country.

Many of the users tend to be expats, Japanese with international friends or experiences, or Japanese interested in western popular culture.

Copycat app SNOW was able to get more traction in Japan, partly due to its localization efforts.
TIK TOK

TikTok, the short, social video network based in China that merged with Musically in 2018 has been rapidly growing in Japan over the past year. Teens in particular have begun using it.

Monthly Active Users: 4 million+ *
Daily Usage: 30 minutes *

Globally, TikTok has experienced increases in its user base as well as usage frequency, with daily usage averaging 41 minutes per day.** The latest data shows that 71% of its users are female and 29% are male.**

* As of April 2018
** As of August 2018

SOURCES: 「TikTok」の認知度は38.2%、利用率は5.8%
TikTok Media Guide 2018.04
TikTok メディアガイド2018Q4, 2018.09.20
Youtube is by far the most popular free online video platform in Japan.

As of 2017, over 4,000 YouTube channels in Japan had more than 10,000 subscribers, and that number has been growing by about 1,300 each year since 2015. Of these influencers, over 60 have more than 1 million subscribers.
The streaming video on demand (SVOD) market has been growing in the last couple of years.

Netflix and Amazon Prime Video have been increasing their share at the fastest rates. Netflix jumped from 4.3% in 2016 to 7.1% in 2017. Amazon Prime Video went from 5.9% to 11.5% during the same period, and is reported to have the most used VOD app in Japan by almost 40%.

During that time, shares of domestic services like dTV decreased from 24.1% to 20.3%.

*Data for 2018 not yet available.*
While shopping at brick and mortar shops is the norm for Japanese consumers, e-commerce is on the rise due to its convenience, competitive prices and an increasing amount of attention in mobile devices.

This information showcases the major players in the country and how people are shopping on them.
Amazon and Rakuten are virtually tied as the two most popular e-commerce services in Japan.

The preference gap widens a little in the 18-24 year old demographic with more favoring Amazon to Rakuten.

Amongst auction sites, Yahoo! Auction is the most popular with 18.8 million users, and Mercari second at over 11 million monthly active users.

Regarding online purchases made in the last year, 58.6% of Japanese paid by credit card, 34% by COD, and 25% paid for it at a convenience store.
E-commerce shopping on both Amazon and Rakuten, the two most popular e-commerce services in Japan, is primarily done through smartphones. Females tend to shop on their smartphones more than males, 78% to 65% on Amazon and 82% to 71% on Rakuten.

SOURCE: 18-64歳の人口の66%が「アマゾン」、「楽天市場」を利用〜ニールセンECサービスの利用状況を発表〜 Nielsen
ABOUT TAMKO

TAMKO is the domestic & international marketing + advertising team at TAM Inc.

Our agency has over 20 years of digital marketing experience gained through working with over 500 clients, 150 of which are publicly traded.

FOUNDED: 1992
OFFICES: Osaka, Tokyo, Singapore, Taipei, London, Amsterdam, San Francisco
STAFF: 158
GET IN TOUCH

HTTP://TAMKO.CO /EN

LOCATION
Misaki Bldg 2F
Kanda Ogawa-machi 3-28-9
Chiyoda-ku, Tokyo 101-0052

HOURS
MON - FRI
10:00AM – 7:00PM

CONTACT US
tamko-ml@tam-tam.co.jp

/tamkoEN
@tamkoEN
@tamko.co
/tam-inc-