



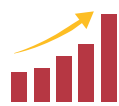
# De compras por el mundo

Hábitos de consumo en la venta a distancia



## JAPÓN

- Monarquía constitucional
- PIB: 3.614.930 M.€ (+0,6% en 2015)
- IVA: 8%



**55,9%**

Previsión de crecimiento e-Commerce 2014 vs. 2018



### Penetración en Internet



#### Por dispositivo

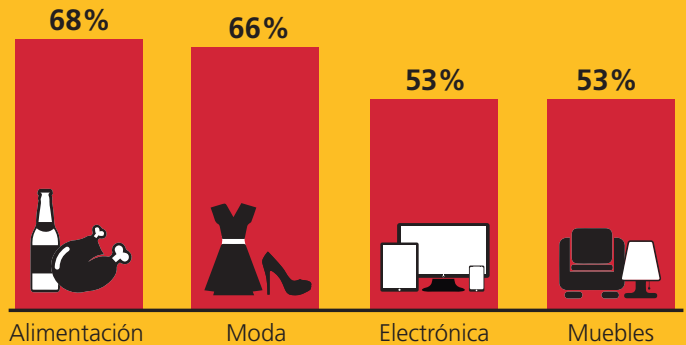


#### Por buscadores



### Sectores más importantes

Datos de compradores online en los últimos 3 meses.



### Compras online vs. acceso a internet



### Fidelidad del cliente



El vendedor japonés premia la fidelidad del cliente ofreciéndole códigos promocionales en artículos ya rebajados.



22,2%  
<30 años



45,7%  
30-49 años



32,2%  
>50 años

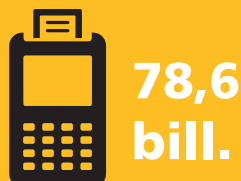
### Devoluciones



En algunos sitios ni siquiera existe la política de devolución. Globalmente la cifra está en 6%.

### Facturación

Datos 2015 en €



### Calendario de venta online 2016



14 de febrero: San Valentín

14 de marzo: White day

Finales de marzo: Graduaciones

Primeros de abril: Comienzo del curso escolar

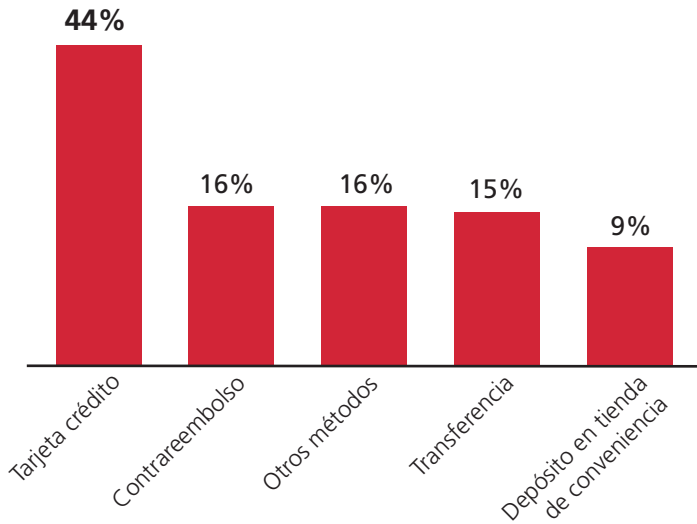
8 de mayo: Día de la madre

19 de junio: Día del padre

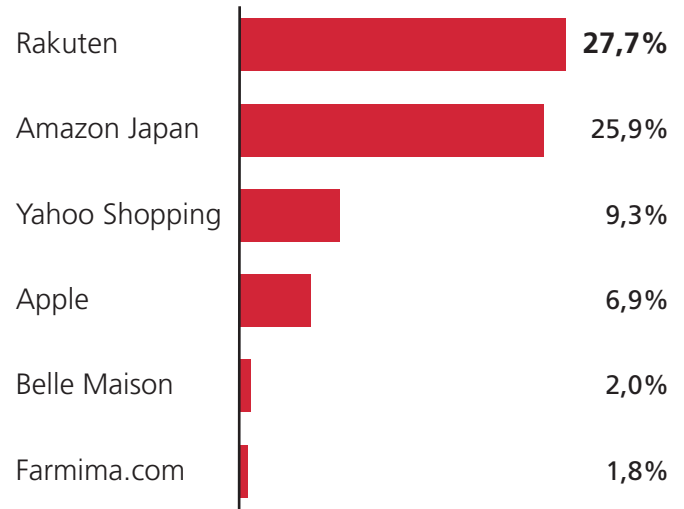
24-25 de diciembre: Navidad\*

\*Aunque el número de cristianos es pequeño, se hacen regalos.

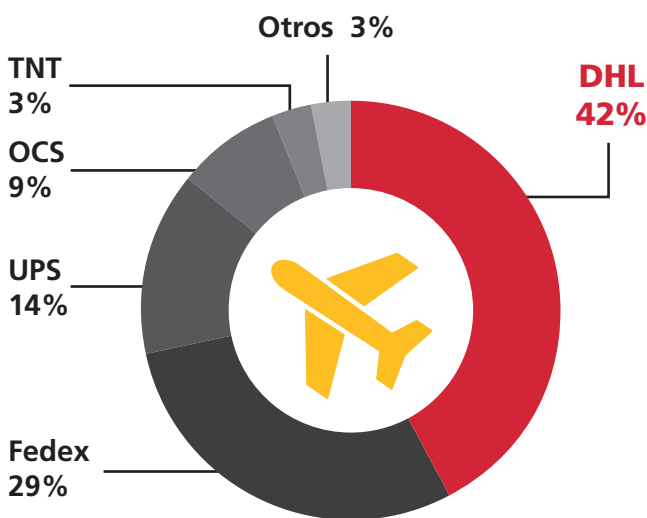
## Métodos de pago más utilizados



## Principales marketplaces



## Cuota de mercado



Si necesita más información visite [www.expортаcondhl.com](http://www.expортаcondhl.com)

## Asociación digital más importante



La Digital Content Association of Japan (DCAJ) promueve la creación, distribución y el uso digital de alta cualificación.







# Country Information Japan

## Tomoki

Japanese online customers are highly educated, urban and have high incomes. They order almost everything, but better not from abroad.

## The economy in Japan \*

Japan's economy is in good shape. In 2013 the GDP increased by 1.6%, for 2014 the OECD predicts a growth of 1.5%. The development is sustained by domestic demand. There are a couple of reasons for this trend. The significant inflation during the past years has been overcome through fiscal policy of the Bank of Japan. In addition the low exchange rate of the Yen supports the Japanese export economy. On the other side contrasting developments can be noticed. The increase in excise tax beginning of 2014 is considered a stumbling block for the economy's development. It affects numerous industries and private consumption. It is in discussion to provide low income households with extra cash payments in order to mitigate the consequences.

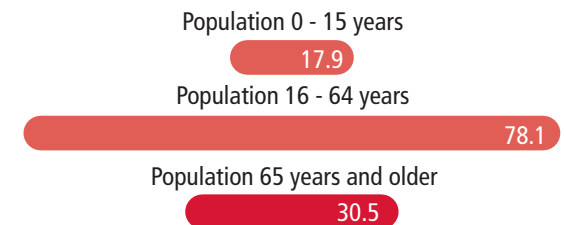
# COUNTRY PROFILE JAPAN

Metropolitan areas with 1 million inhabitants or more · 2011 in thousands \*\*



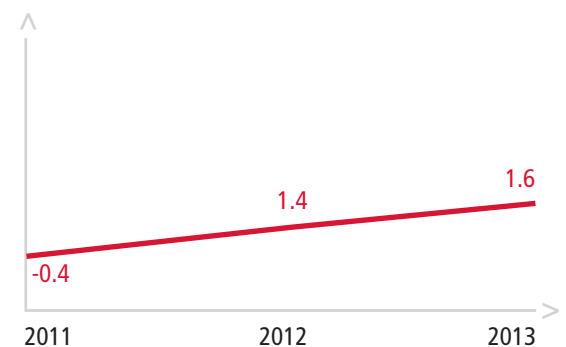
Population, total · 2013 in mn. **126.5** \*\*\*

Age distribution · 2013 in mn.



Number of households · 2013 in mn. 45.0  
 Ø Household size · 2013 2.8  
 Unemployment rate · 2013 in % 4.0  
 Inflation rate · 2013 in % 0.4

Economic growth · in % \*\*\*\*



\* Source: Fischer World Almanac 2014, Germany Trade & Invest \*\* Source: Metropolitan areas with 1 million inhabitants and more; United Nations, Department of Economic and Social Affairs, Population Division (2012). World Urbanization Prospects: The 2011 Revision, CD-ROM Edition. \*\*\* Source: Copyright © IHS, 2013. All rights reserved \*\*\*\* Source: Copyright © IHS, 2013. All rights reserved

## Internet use

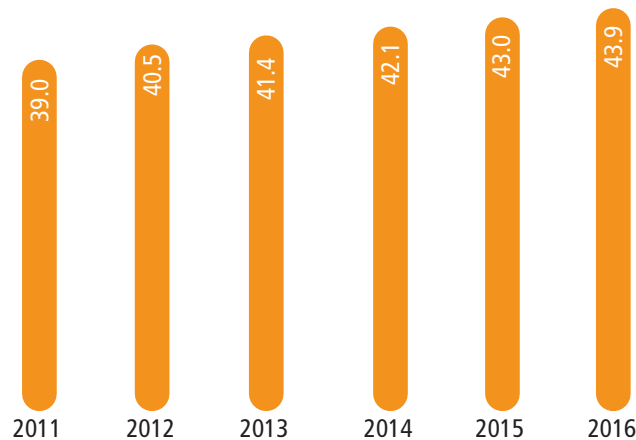
By now, the number of stationary internet users in Japan grows moderately only, while mobile communication is becoming more popular and shows a large growth. In particular, smartphones and tablets are the driving forces. While <20% of Japanese consumers used a smartphone in 2012, it was almost 25% one year later, with rising tendency.

## Second-largest advertising market

A stable growth of 2% is forecasted until 2016 for the second-largest advertising market worldwide. Rather low growth is expected for the strongest growth driver internet, while growth rates of 2% are forecasted for the dominant medium TV.

# MEDIA USE IN JAPAN

**Total advertising expenditure**  
· in EUR bn. \*



**Internet users · 2012 per 100 people \*\***



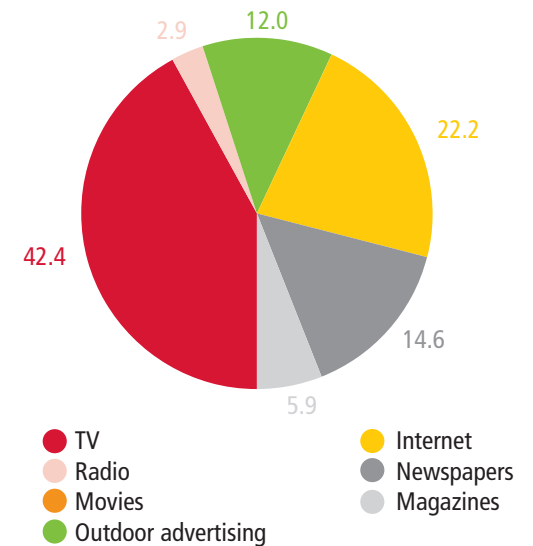
**Permanent access to broadband internet · 2012 per 100 people \*\*\***



**Cellphones · 2012 per 100 people \*\*\*\***

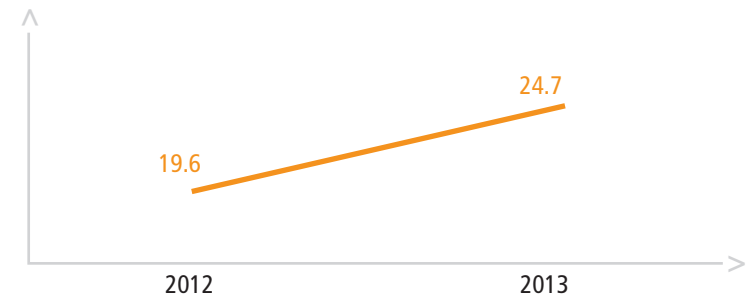


**Share of adspend by medium**  
· in % \*



**Smartphone market penetration · in % \*\*\*\*\***

Representative domestic population 16+, n = 1,000



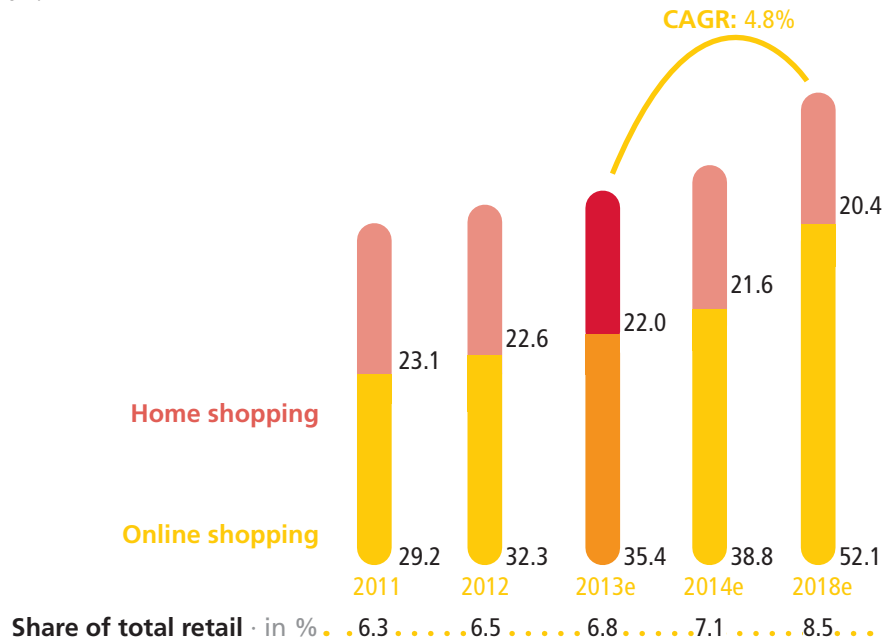
\* Source: Zenith Optimedia, 2013 \*\* Source: Copyright © IHS, 2013. All rights reserved \*\*\* Source: The World Bank \*\*\*\* Source: Copyright © IHS, 2013. All rights reserved \*\*\*\*\* Source: Our Mobile Planet: Google Global Smartphone Study 2013, <http://www.thinkwithgoogle.com/mobileplanet/>

**Low growth rates**

Due to a high level of market saturation, the third-largest distance selling market shows little growth only. Groceries, cosmetics, and healthcare products are the most popular categories purchased in Japan. Further growth is mainly expected in consumer electronics, media products, groceries, and fashion.

# DISTANCE SELLING IN JAPAN

**Development of Distance selling and share of total retail 2011 - 2018**  
· in EUR bn. \*

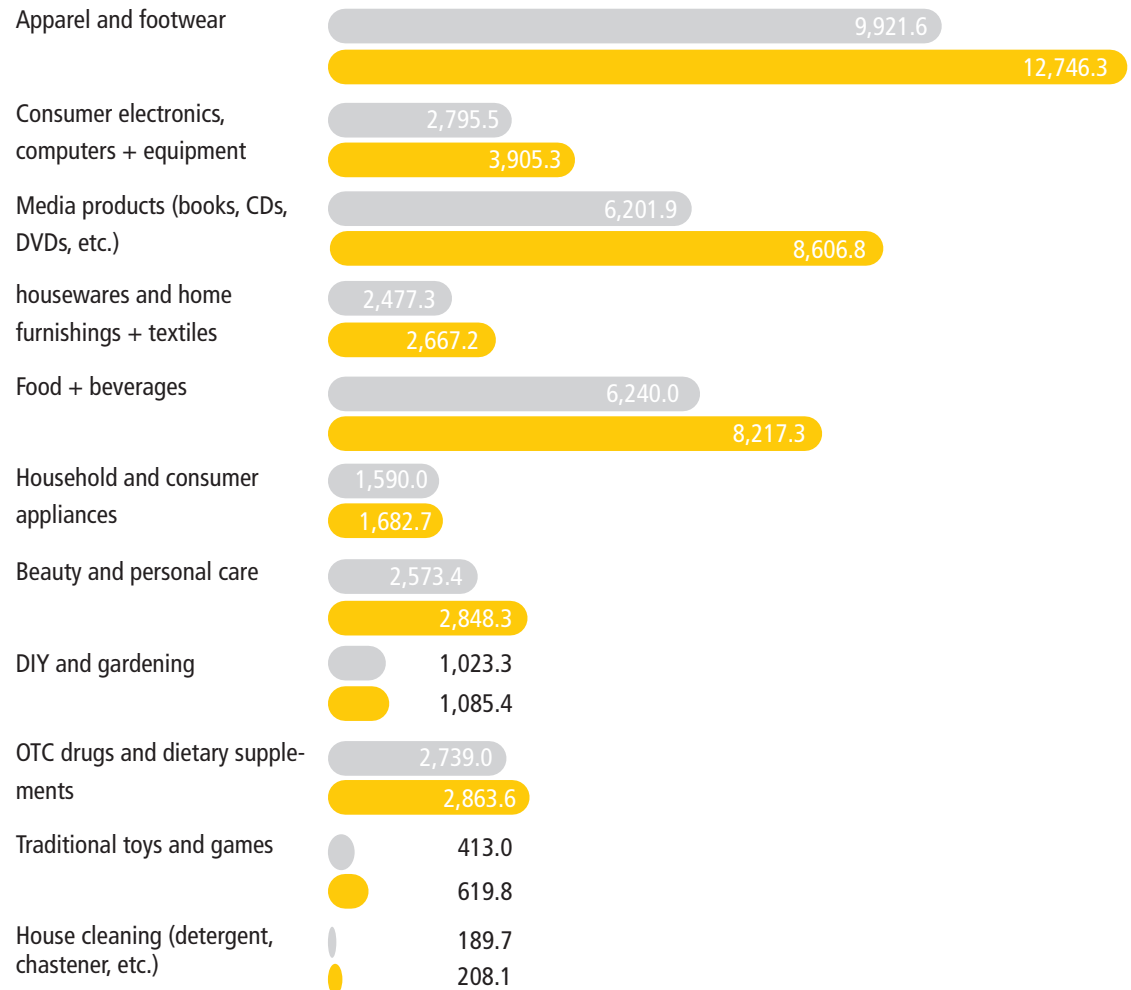


\* Source: Euromonitor International

**Distance selling purchases in 2013 - trend for 2018**

· in EUR mn. \*

● 2013 ● 2018



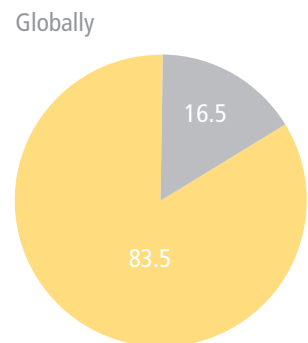
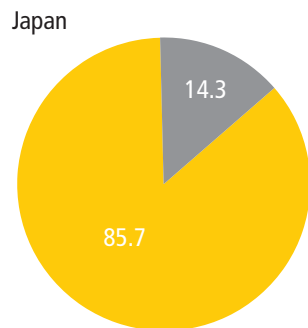


Saturated market

Japan features a strongly developed distance selling market. Based on the Japanese consumer feedback, this will continue. 95% of surveyed users are planning to order at least as often as in the last 12 months.

Use of distance selling

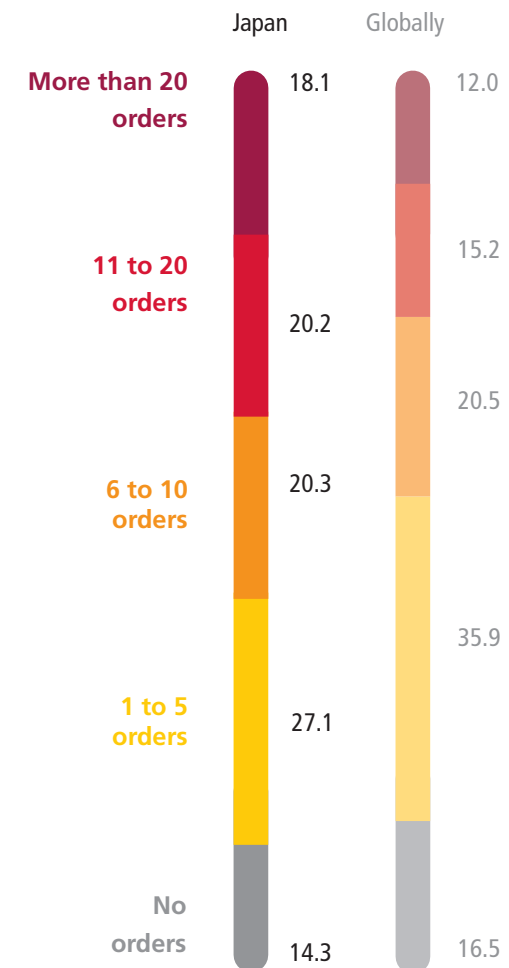
in % \*  
 ● Yes ● No



# DISTANCE SELLING IN JAPAN

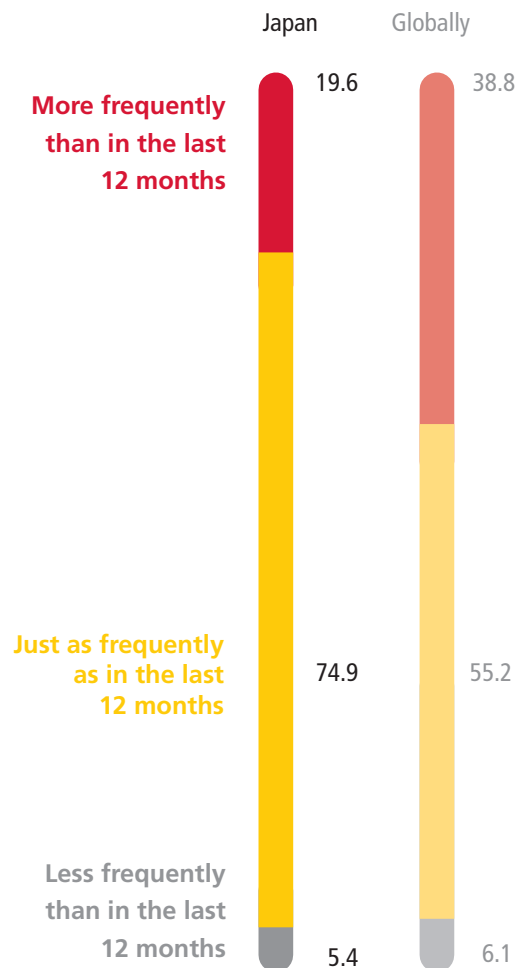
Number of orders in the previous year

in % \*



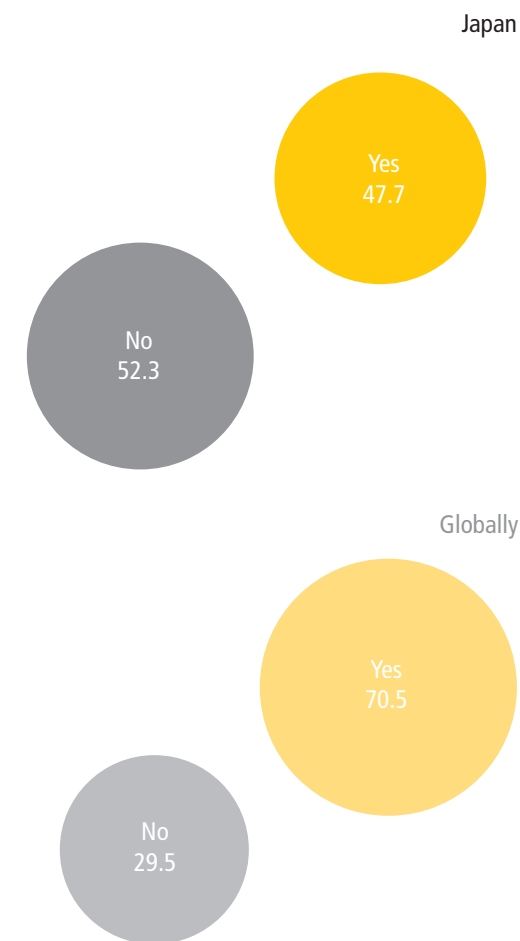
Future ordering behavior (current users)

in % \*



Non-users of distance selling - future plans

in % \*



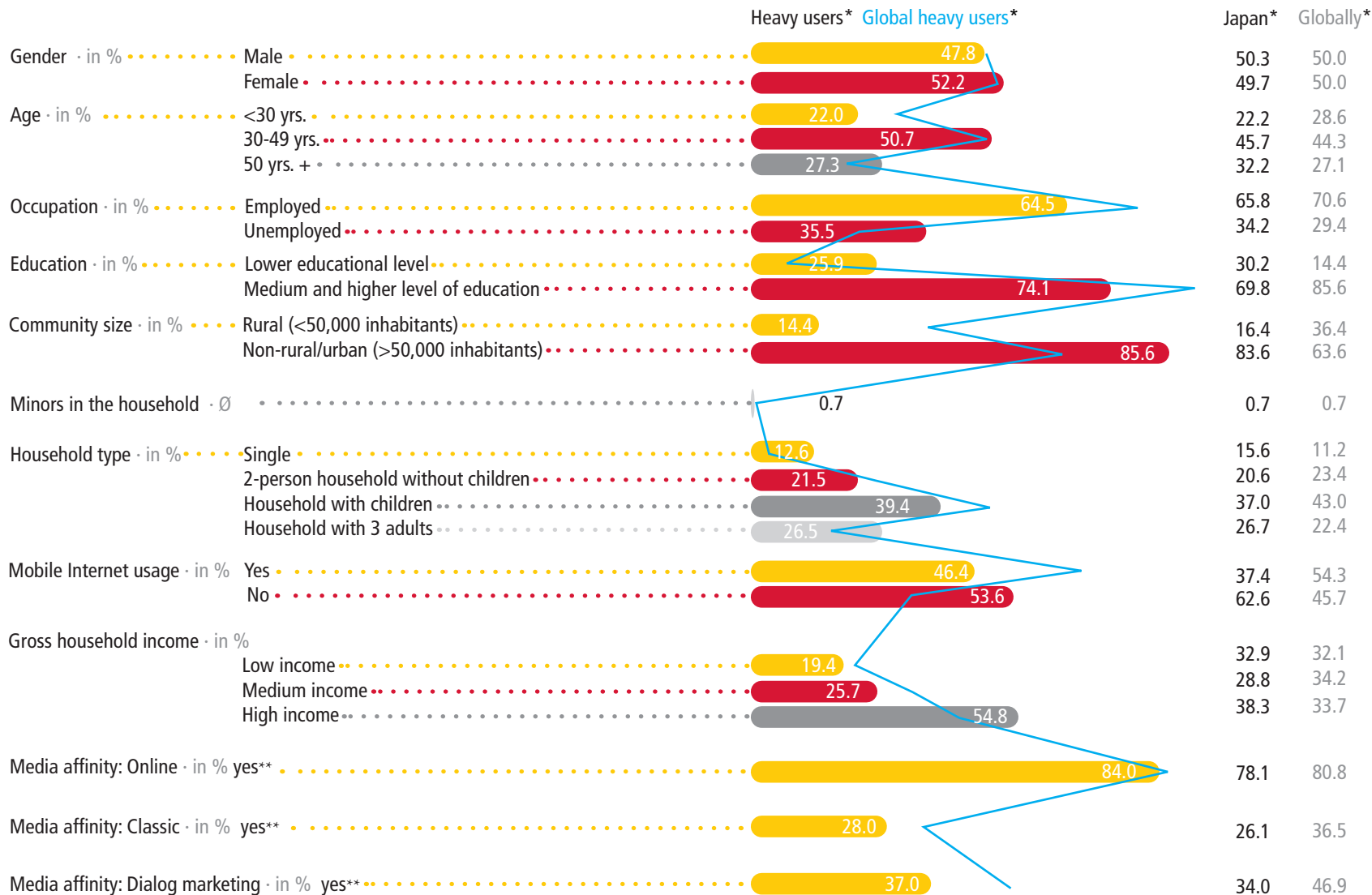
\* Source: DHL Global Mail 2013 · n Global from 1,275 to 11,265 · n Japan from 44 to 514



# DISTANCE SELLING IN JAPAN \*\*\*

## Urban structure dominant

Japan's society is very much concentrated in urban areas. Accordingly, the majority of eCommerce customers lives in urban centers. The group of heavy users can be increasingly found in the group of older consumers, who do not work anymore. Within this group only 46.4% are using mobile devices, which is significantly below the global average.



\* Source: DHL Global Mail 2013 · n Global from 2,661 to 11,265 · n Japan from 125 to 514 \*\* media affinity for online / classic / dialog marketing, if at least one medium from the respective area was rated 5 or 6 on a scale of 1 "absolutely not useful" to 6 "very useful" \*\*\* the top third of most active mail order users

**The price matters**

Price comparison sites are the most important source for product information searches. Along with that, affordable prices and free-of-charge delivery are key criteria for selecting a distance selling provider.

Search engines

Customer ratings in blogs or forums

Product test ratings / expert test reports

Price comparison sites

Product check in a retail store

Retailer or manufacturer website

Online marketplace

Catalog

Mail advertising

Social media platforms such as Facebook and Twitter

Apps (on smartphone, iPad, or tablet)

Recommendations from friends, acquaintances, and colleagues

Customer ratings on the supplier's website

## "CUSTOMER JOURNEY" – SEARCHING FOR PRODUCT INFORMATION

### Search for product information

· Japan in % \*

44.3

23.4

6.9

54.0

29.3

45.7

40.3

24.2

9.1

9.2

7.1

17.7

34.2

Globally

53.2

35.5

23.4

44.2

23.9

45.8

42.5

25.1

15.1

15.1

9.7

37.8

40.6

### Criteria for choosing a vendor

· Japan in % \*

6.9

7.8

6.1

39.3

10.3

64.2

4.8

13.0

24.0

18.5

62.8

11.5

Globally

20.7

13.7

8.8

26.6

14.9

51.7

12.9

20.8

22.6

25.7

45.2

18.5

\* Source: DHL Global Mail 2013 · n Global from 9,386 to 10,617 · n Japan from 437 to 475, multiple mentioning

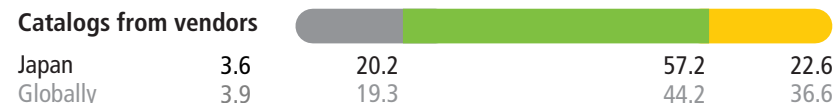
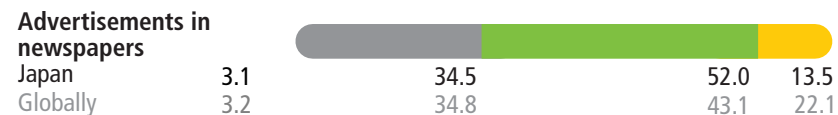
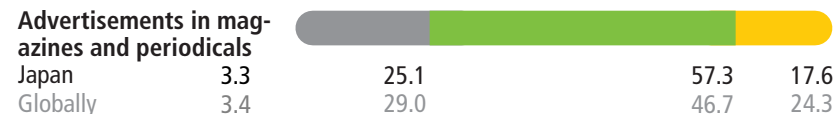
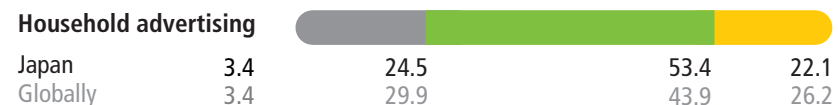
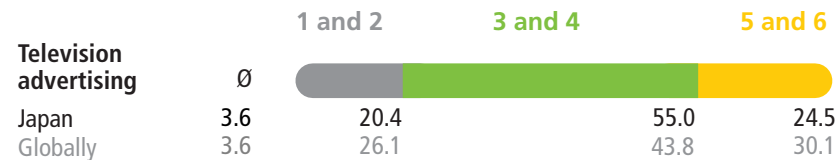
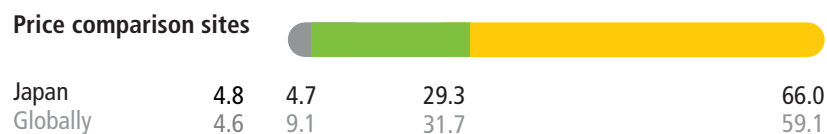
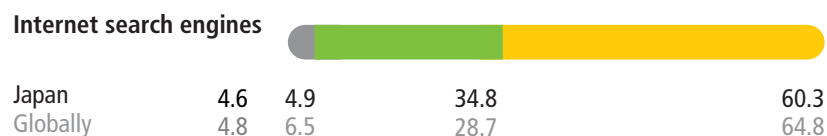
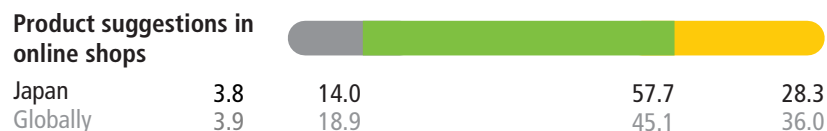
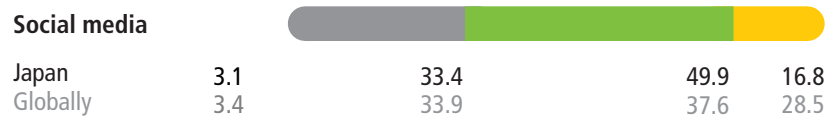
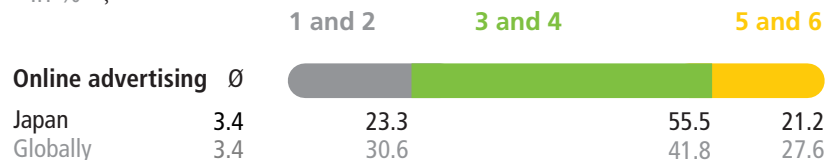
# ACCEPTANCE OF ADVERTISING MEDIA

## Price comparisons win

In the eye of Japanese consumers price comparison websites are considered as most useful, followed by search engines. Consequently classic media, such as advertising letters, billboard advertisement and radio are less valued within the Japanese target group.

### Usefulness of advertising media

· in % \*,\*\*

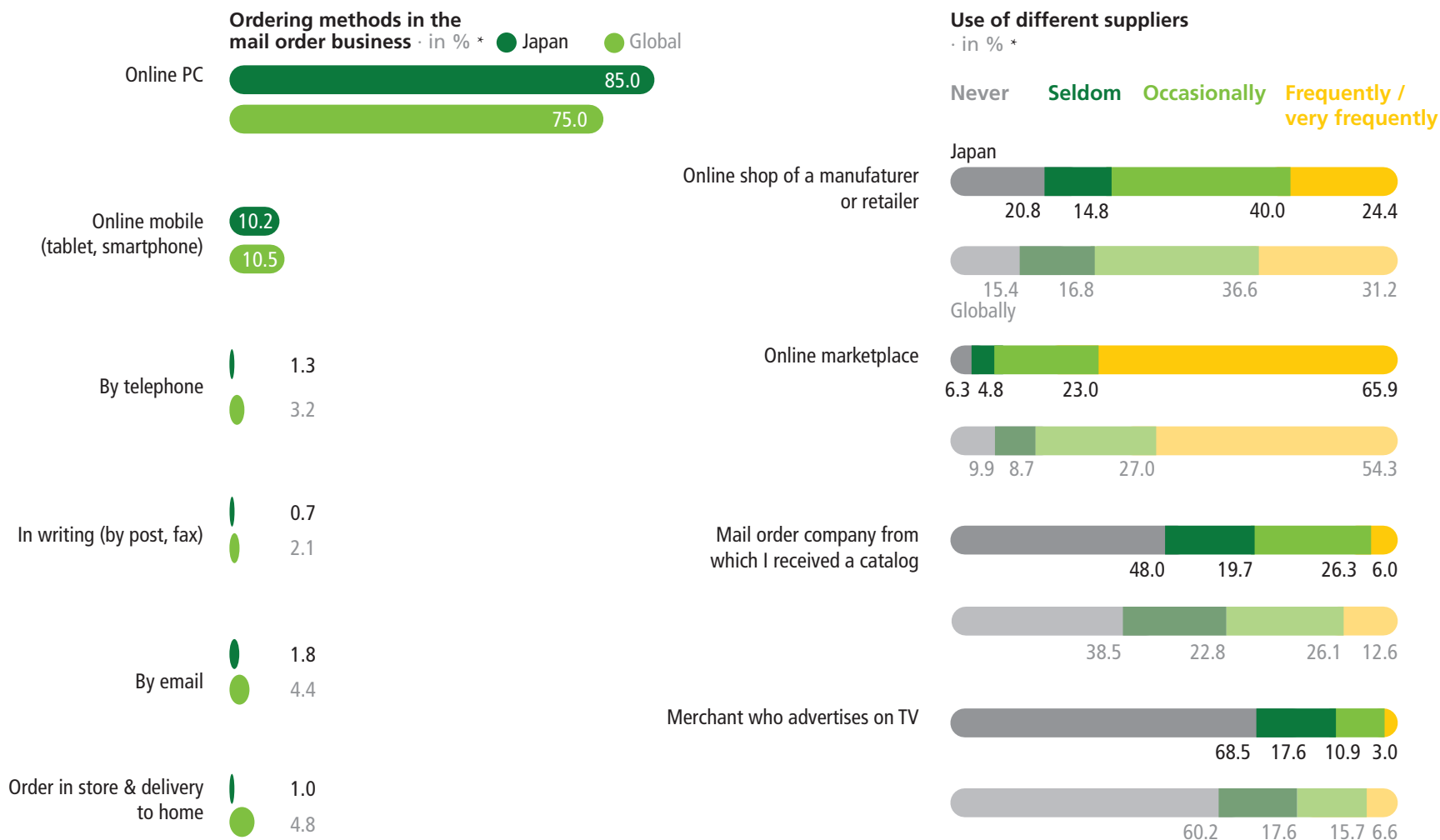


\* Source: DHL Global Mail 2013 · n Global from 10,218 to 10,384 · n Japan from 408 to 465 \*\* scale from 1 "absolutely not useful" to 6 "very useful"

Online rules

85% of the Japanese distance selling clients mainly place their orders via PC. Around every tenth person uses a tablet or smartphone. Only 3% use offline ordering channels. This distance to offline channels can also be seen in the very limited use of catalogs, which are not even recognized anymore by almost half of the consumers. The extraordinary preference for online channels can be seen in the high usage intensity of online marketplaces. With around two thirds, Japanese consumers visit these places significantly more frequently than the global average. However, online shops follow with a significant gap in second place. Teleshopping is of almost no importance.

# "CUSTOMER JOURNEY" – PLACING ORDERS



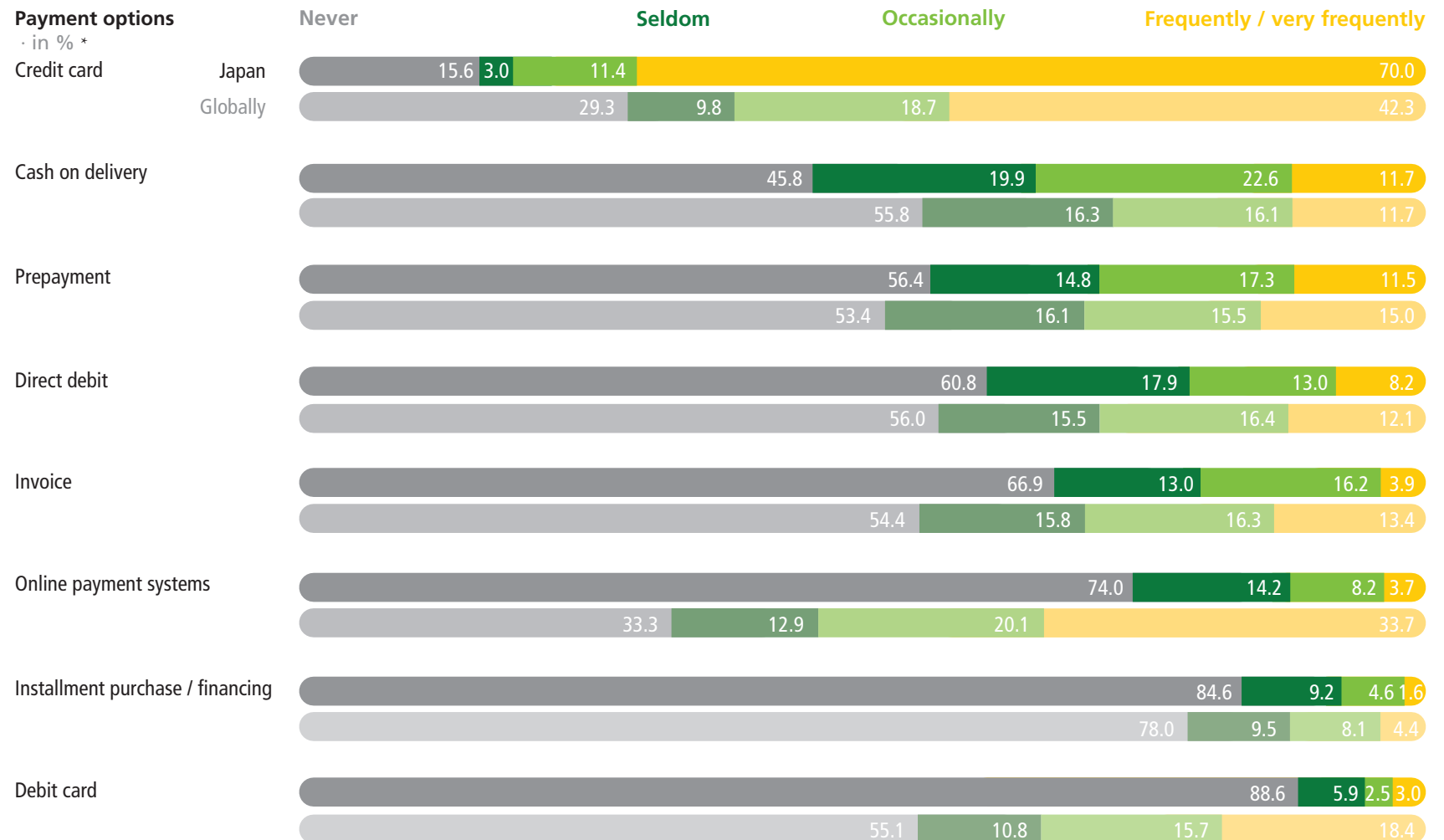
\* Source: DHL Global Mail 2013 · n Global from 9,270 to 9,446 · n Japan from 430 to 441



### One card for everything

Credit cards are the preferred payment method for 70% of Japanese consumers. With that, Japan is significantly above the global average. However, online payment systems, globally in second place, are virtually not used in Japan. Almost three fourths of all distance selling customers have never used these systems. All other payment methods are of little relevance.

## "CUSTOMER JOURNEY" – PAYMENT METHODS



\* Source: DHL Global Mail 2013 · n Global from 9,218 to 9,324 · n Japan from 436 to 439

## "CUSTOMER JOURNEY" – DELIVERY

Requirements for delivery · Ø \*\*, \*\*

- Japan
- Globally

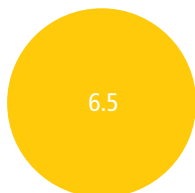
### Free delivery is important

For Japanese consumers it is most important to have free delivery of orders. An average transit time of 6.3 days is being accepted (global average).

### Max. accepted order time

· Ø in days \*

- Japan
- Globally



The option of selecting the shipping company

The vendor only works with reliable delivery companies

Detailed information regarding delivery period & delivery date when ordering

Fast delivery

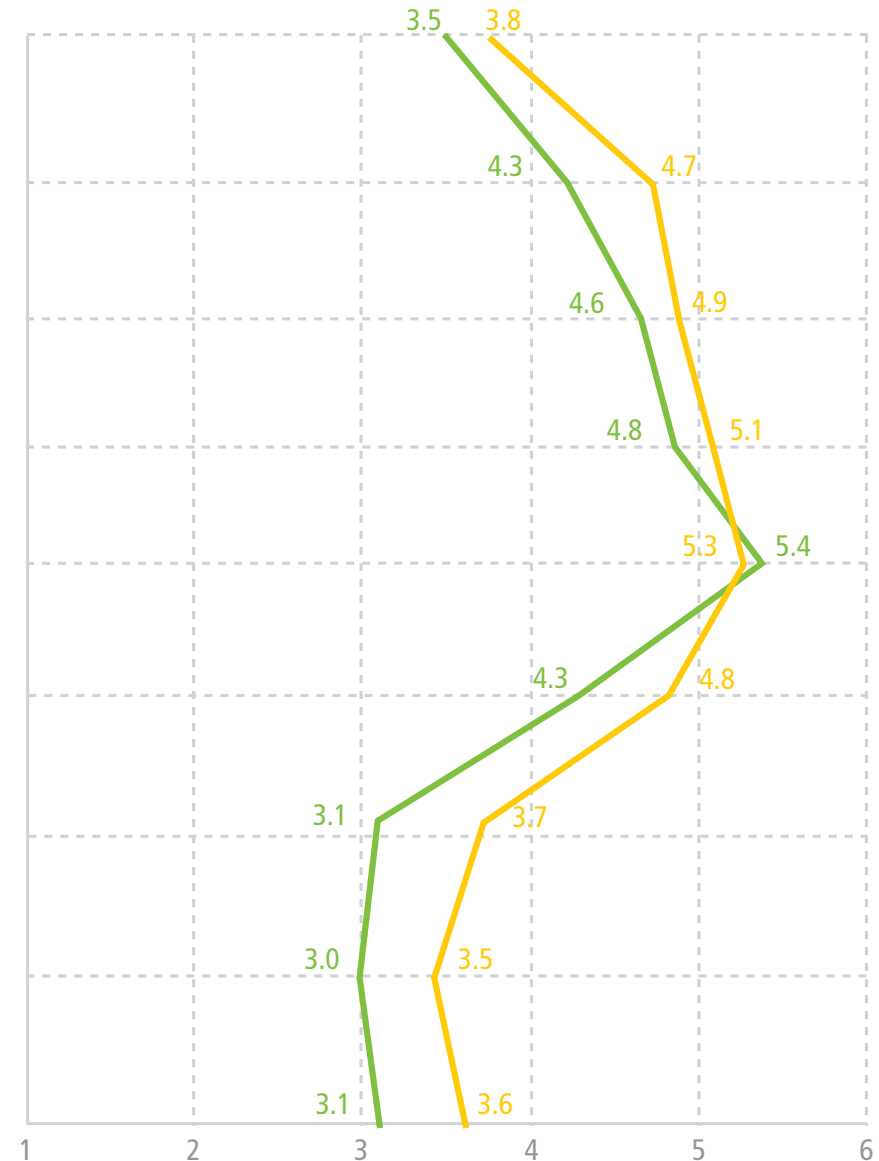
Free delivery

Tracking information

Delivery to a retail store

Delivery to a parcel locker or drop box

Other collection points (supermarket, kiosk, gas station)



\* Source: DHL Global Mail 2013 · n Global from 10,270 to 10,462 · n Japan from 455 to 469 \*\* scale from 1 "absolutely not important" to 6 "very important"

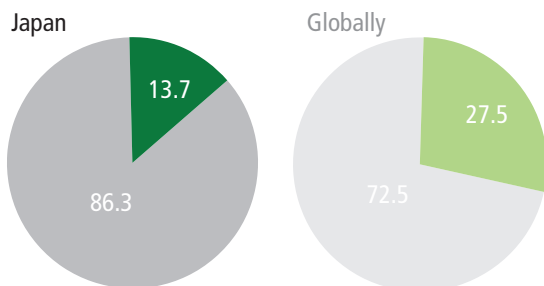
Returns do not exist!

To return a product seems to be a sign of discourtesy in the opinion of Japanese distance selling customers. Barely every seventh consumer returned products in the past. The rate of returns is with 2% respectively low and significantly below the global average. A return is mainly caused by a faulty product. It almost never happens in Japan that a product is returned because the consumer is generally unsatisfied with it. So far, it has been unthinkable in Japan to purposefully order several variants for selection.

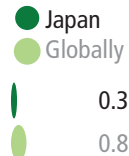
# "CUSTOMER JOURNEY" – RETURNS

Percentage of users who returned goods · in % \*

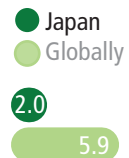
● Yes ● No



Number of returns per capita per year · Ø \*

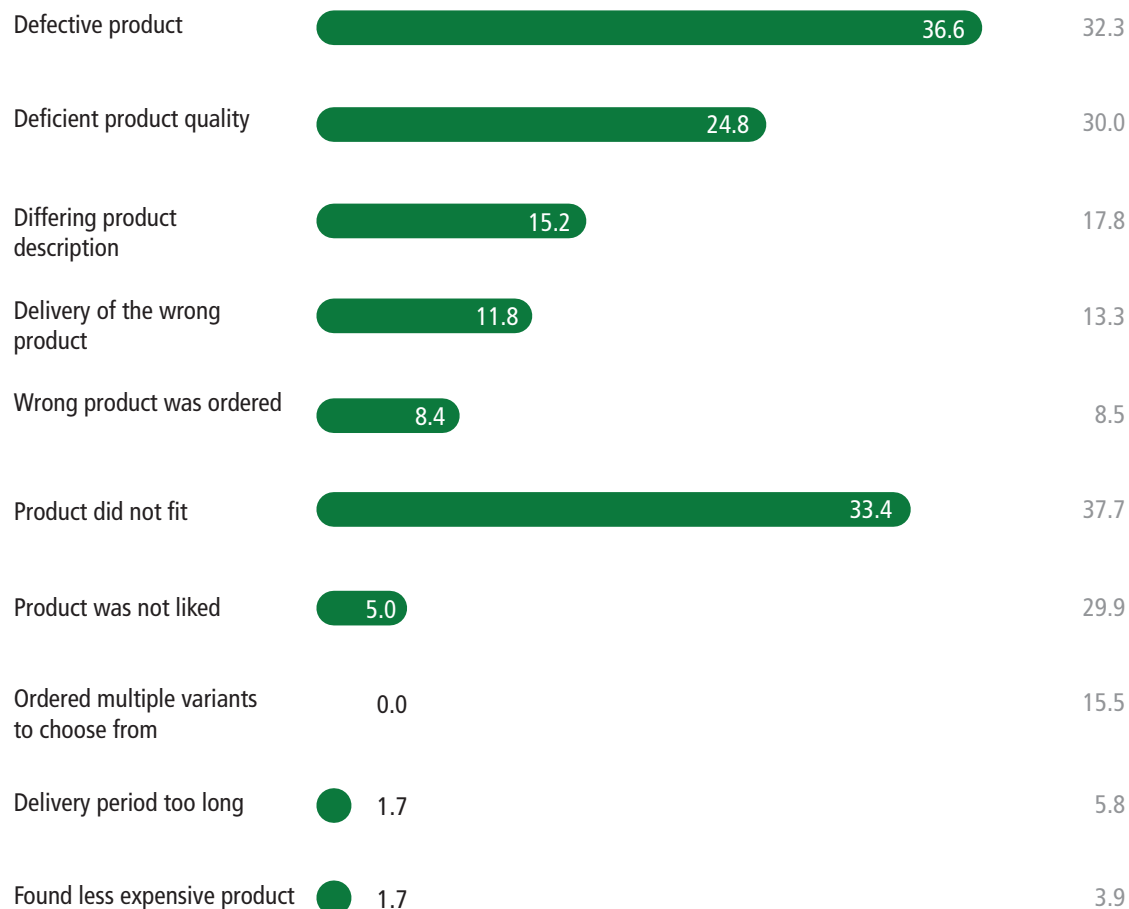


Return rate · in % \*



Reasons for returns

· Japan in % \*



\* Source: DHL Global Mail 2013 · n Global from 2,648 to 9,325 · n Japan from 60 to 441

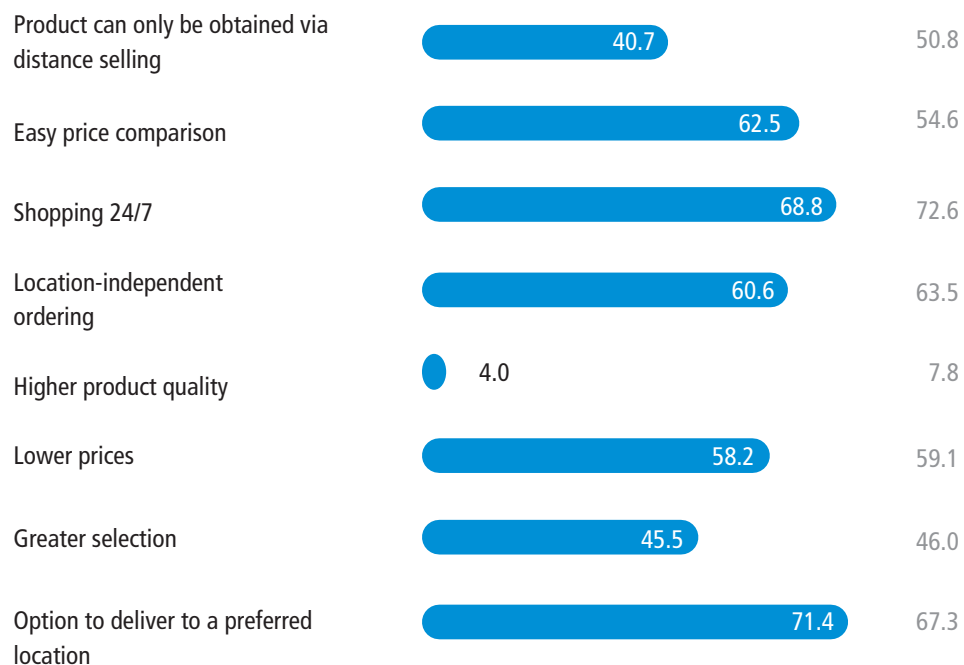
**Pragmatic reasons**

Comfortable home delivery, flexible opening hours, and complete price transparency are the central drivers for distance selling in Japan.

## DRIVERS & BARRIERS IN DISTANCE SELLING

**Drivers in mail order business**

· Japan in % \*

**Barriers in mail order business**

· Japan in % \*

Globally



\* Source: DHL Global Mail 2013 · n Global from 10,509 to 10,864 · n Japan from 472 to 500



**Mentality of an export nation**

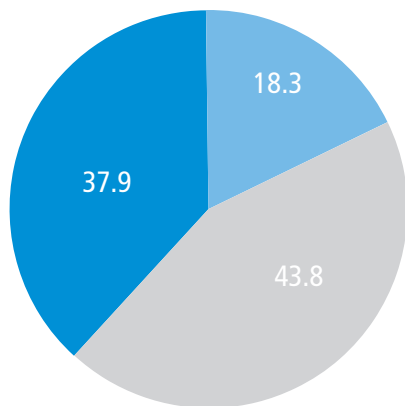
Only 38% of Japanese consumers have ordered abroad before. Another 18% plan to do so in the future.

Today international orders are mainly placed in the US or in other Asian countries (e.g. China). Going forward, the USA will be even more preferred in the future, the focus on Asian markets will be shifted towards Europe. As a result, China will become less important for Japanese cross-border shoppers.

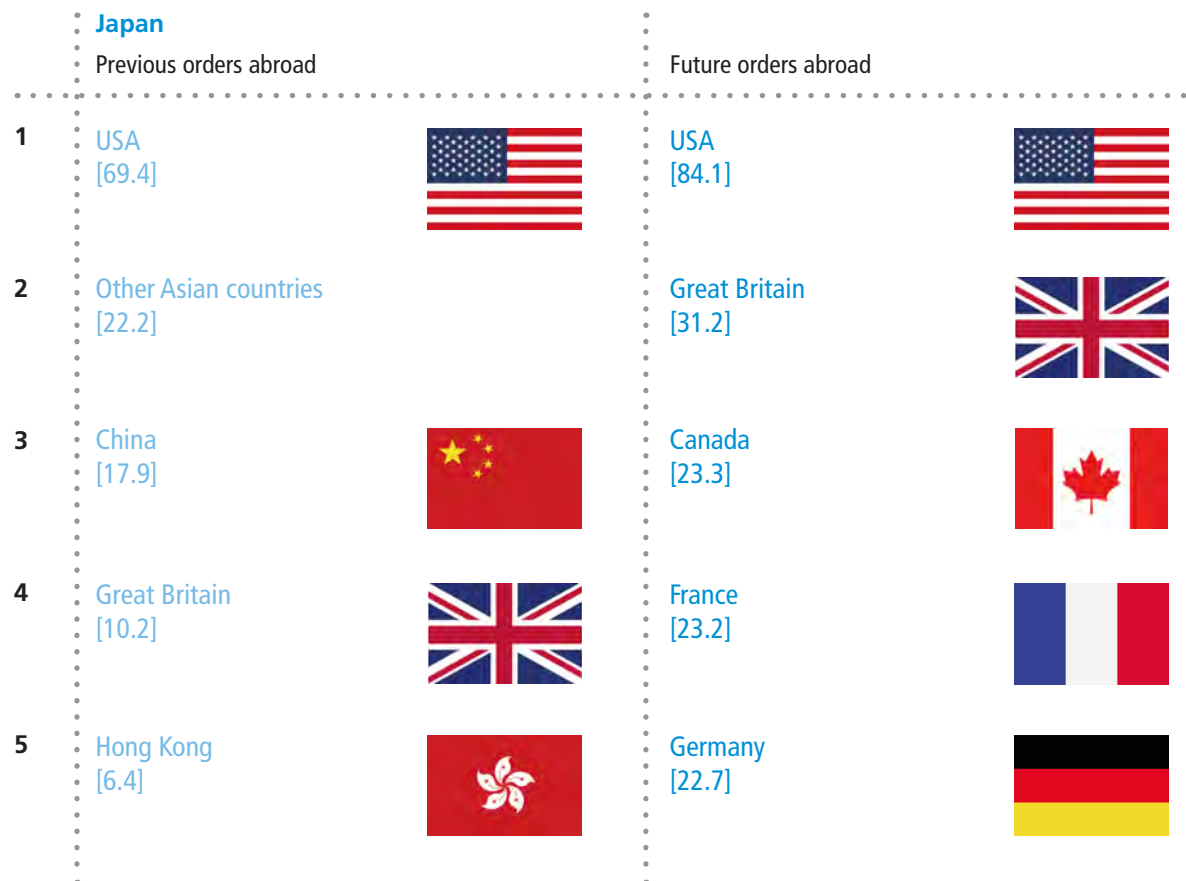
# CROSS-BORDER SHOPPING – OVERVIEW

**Use of cross-border eCommerce**  
in % \*

- Yes, already ordered \*\*
- No, but future orders planned
- No, no future orders planned



**Previous and future orders abroad by country**  
in % \*

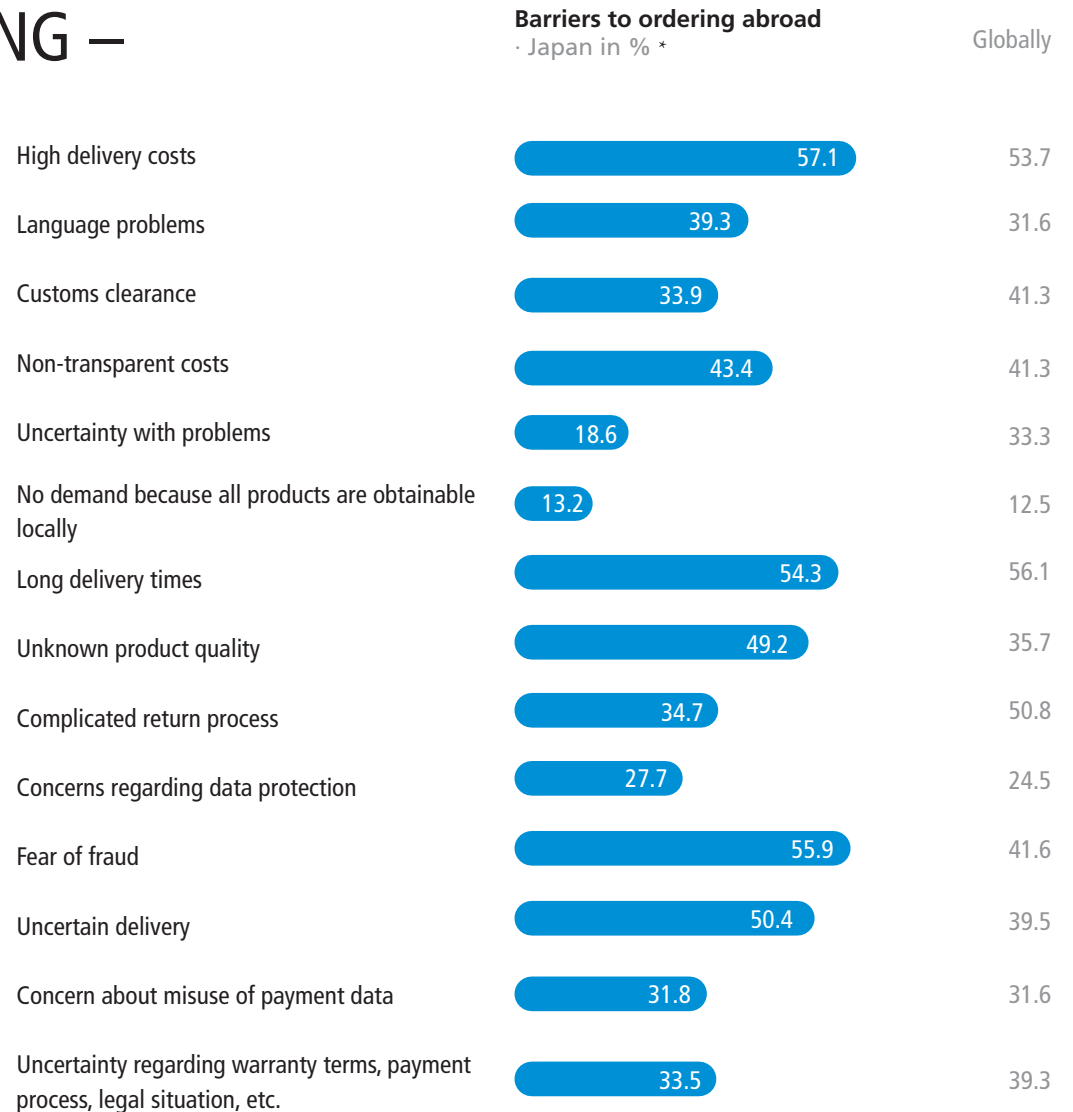
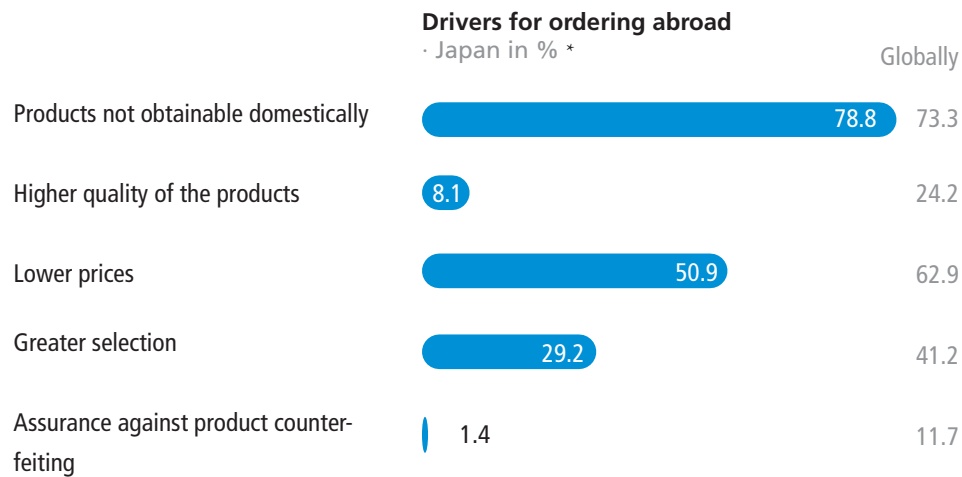


\* Source: DHL Global Mail 2013 · n Global from 4,738 to 8,807 · n Japan from 157 to 328 \*\* split into "further orders planned" 34.8 % Japan and "no further orders planned" 3.1 % Japan

**Skeptical attitude**

When ordering from abroad, the fear of fraudulent intentions is the major barrier for Japanese distance selling clients. With more than 50% agreement, this value is significantly above the global average. Lack of product availability and lower prices are the main drivers for cross-border shopping.

## CROSS-BORDER SHOPPING – DRIVERS & BARRIERS



\* Source: DHL Global Mail 2013 · n Global from 7,289 to 10,689 · n Japan from 222 to 483

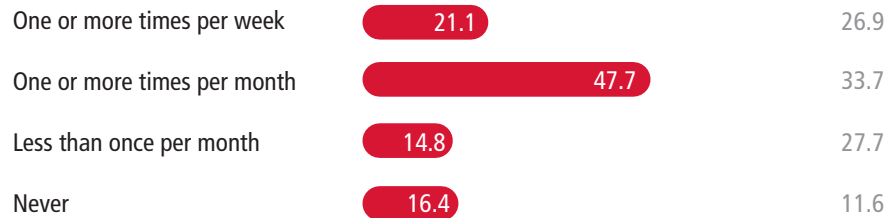
## Polite reservation

In Japan, mailings or catalogs are less common: 16% never receive advertisement in their letterbox. Mailings are frequently read by barely one third. Only every tenth recipient responds to dialog marketing. The most commonly used response is a visit to the website of the advertising company. However, the frequency is much below the global average. Visits to the store are even rarer. However, response cards are used above global average.

# DIALOG MARKETING

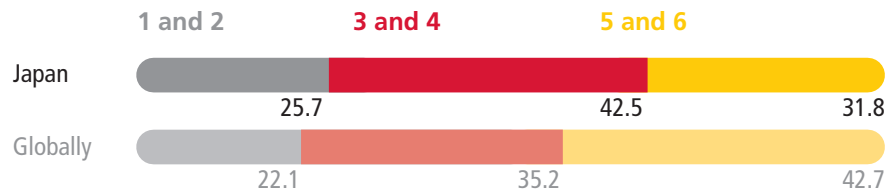
## Receipt of mailings and catalogs

· Japan in % \*



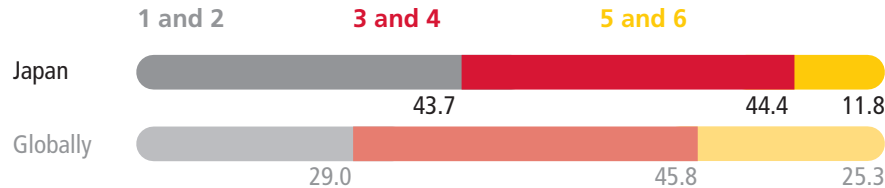
## Reading mailings and catalogs

· in % \*\*, \*\*



## Response to mailings and catalogs

· in % \*\*, \*\*



## Response channel for mailings and catalogs

· Japan in % \*



\* Source: DHL Global Mail 2013 · n Global from 8,788 to 11,265 · n Japan from 355 to 514 \*\* scale from 1 "never" to 6 "almost always"