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How is **Japan** different?

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Why Japan's Cellphones Haven't Gone Global



FILED UNDER [Cellphones](#),

Japanese phones suffer from 'Galapagos Syndrome' - are too complex to survive abroad

By Tim Stevens | posted Jul 20th 2009 10:32AM

Woo ケータイ H001
by HITACHI



※実際に人物は飛び込まずに、(2009年時点)



Japanese cell phone
By HIDEKO TABUCHI
Published: July 12, 2009

TOKYO — At its dream: ready for boarding passes

While Americans are [pining for smartphones](#), even though they don't have any idea how to use the things, in Japan people not only pocket far more advanced cell phones than here, but use them productively. More than twice as many people use smartphones there than do in the States (despite less than half the population).

Slowing Japan's Galapagos Syndrome



By Fairer Globalization – Global Blogger
Published: April 30, 2010 10:13 ET in Commerce



GaijinPot
LIVE. WORK. PLAY IN JAPAN.



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In Japan Live Work Play

The Galapagos Syndrome and Japanese Cell Phones

NOVEMBER 8TH, 2010 | BY PETER DYLOD | CATEGORY: JAPAN

Many consider Japan to be the historical gold standard for mobile cell phone culture. It's easy to see why. In 1979, Nippon Telegraph and Telephone (more commonly known as NTT) launched the world's first commercially automated cellular network. By the end of the 20th century, the country achieved another milestone in equipping Japanese cell phones with internet browsing capabilities, which were at that time, the only cell phones in the world to come with color displays, MP3 players, integrated cameras and radios. Industry firsts were

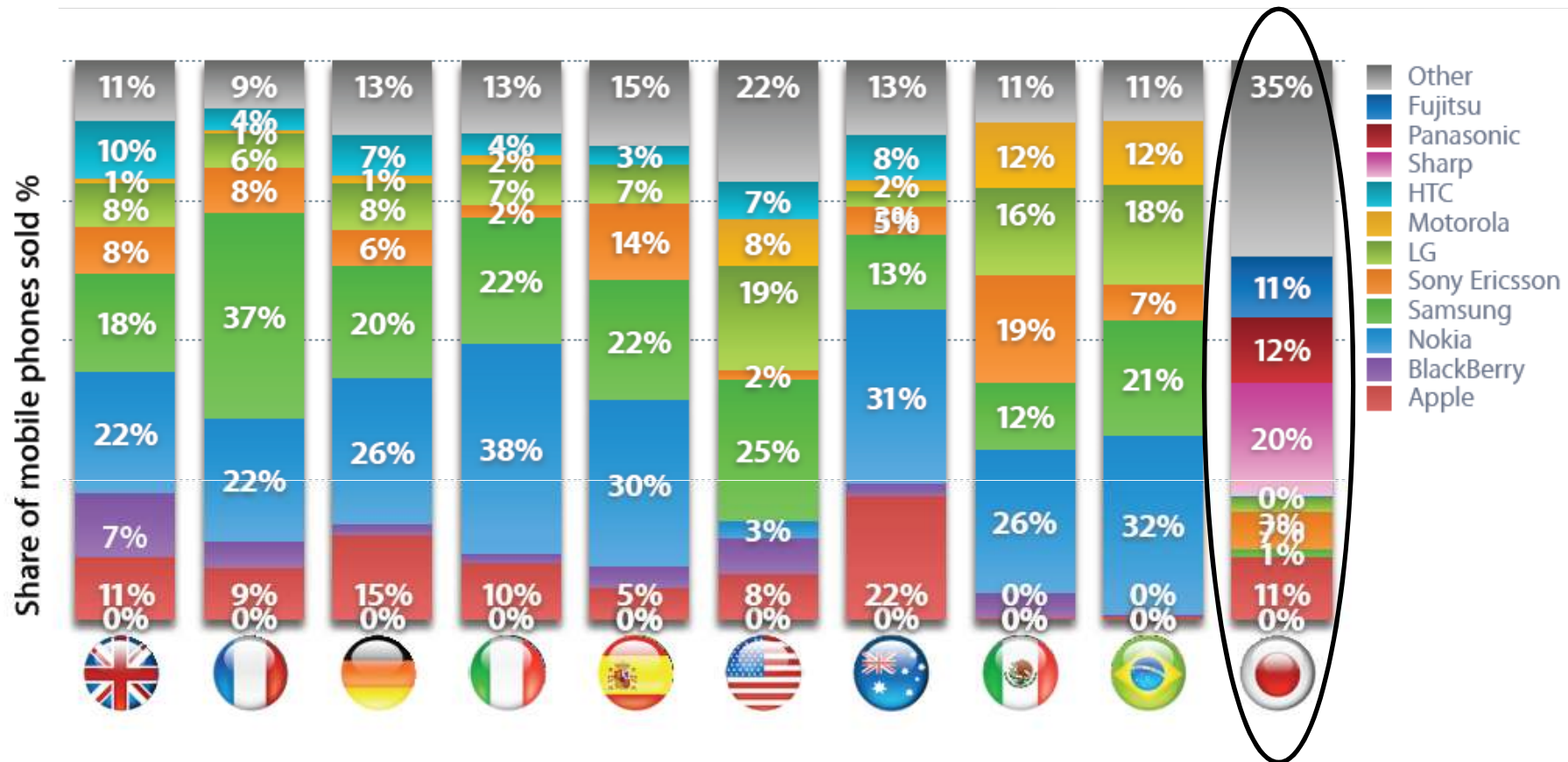


The media always tells us that the Japanese mobile market is different from the rest of the world, but is this still the case?

The answer is a story of two halves...

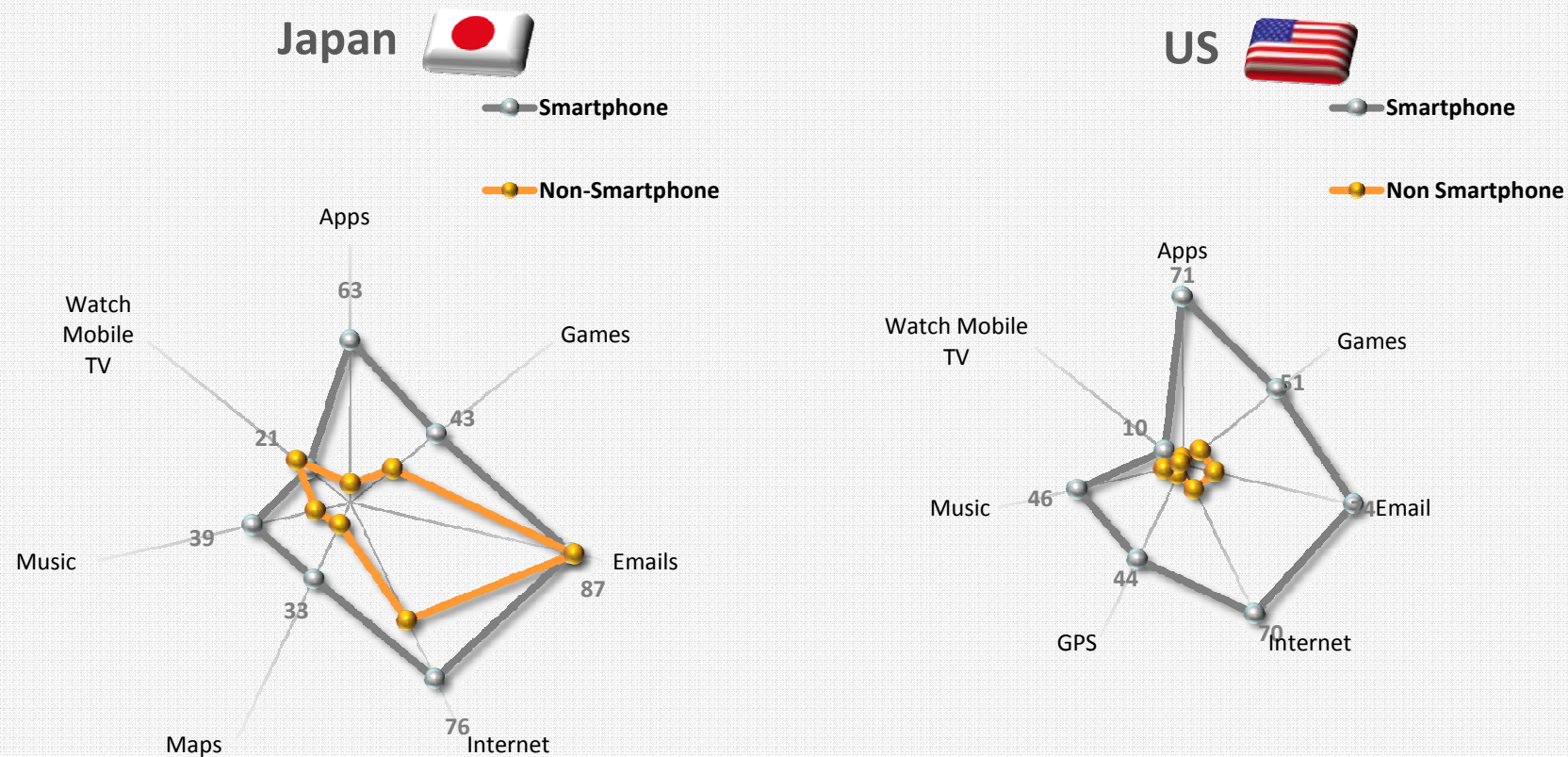


Japanese manufacturers dominate at home, but not abroad



However Apple has proved that with the right device there is an appetite for phones from foreign manufacturers.

Japanese mobiles have been accused of being too advanced for Western consumers, but Smartphone share is low in Japan. Are definitions to blame?



As Smartphone's proliferate in the West, usage of mobile phones in Japan and elsewhere is becoming increasingly similar

Mobile phones in the West have become increasingly larger over the past 10 years-a very different trend from Japan where Clamshell still dominates

80 x 42 x 22.9 mm



112.5 x 62.2 x 14 mm



123 x 68 x 11.8 mm



152.9 x 79.1 x 10 mm

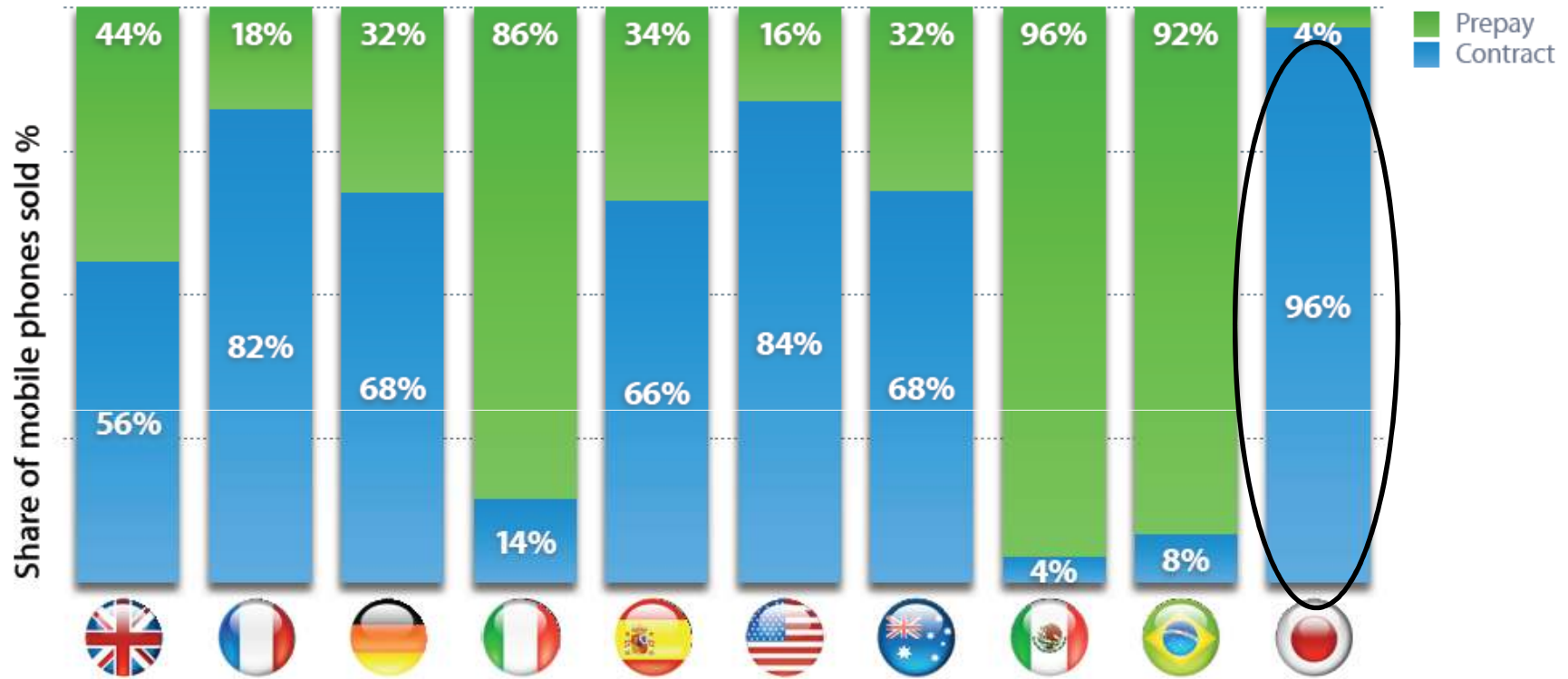


190.1 x 120.5 x 12 mm



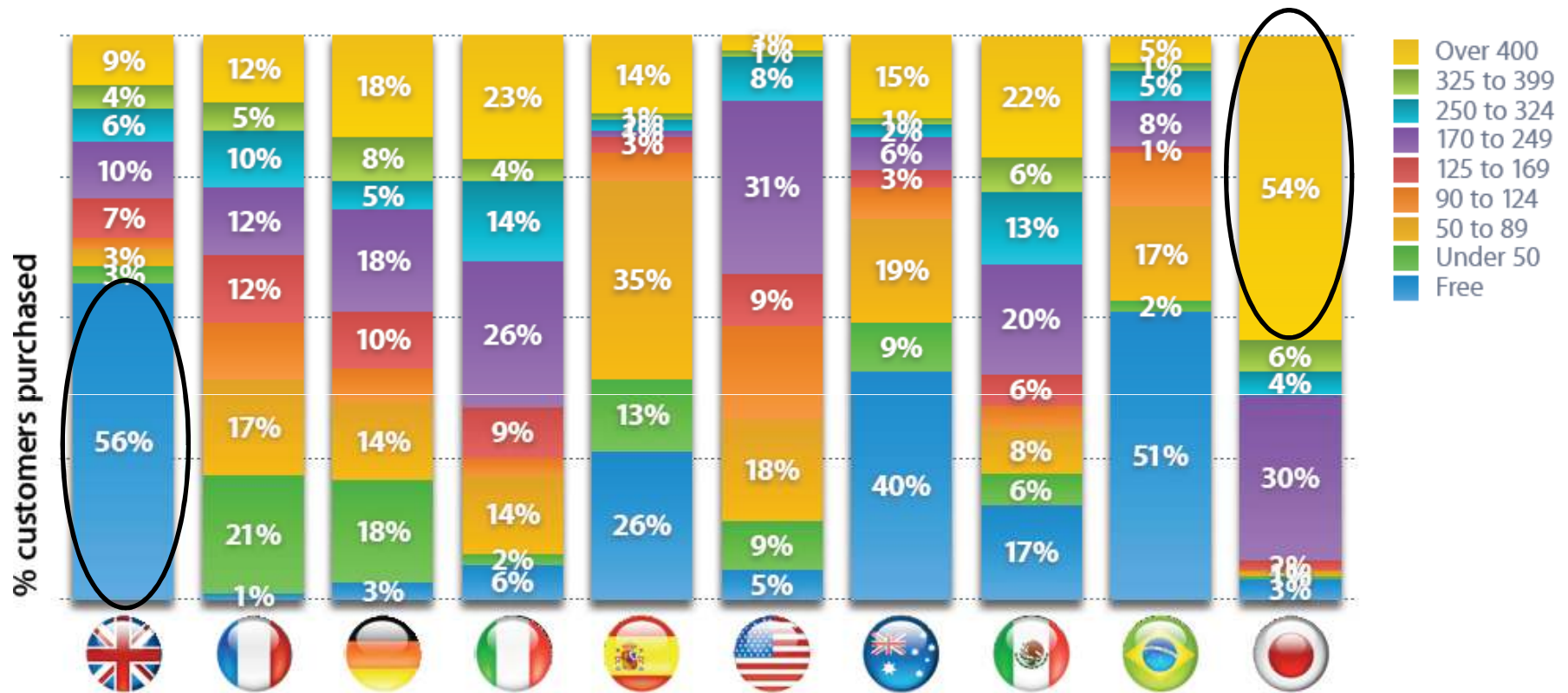
Clamshell was 59 % of purchasing in Q4 2010, but 72% of installed base. Bar and Swivel in strong growth.

Contract dominates in Japan, whilst Prepay plays an important part in market segmentation in many other countries



Contract is becoming increasingly biased to Smartphone (data packages), whilst Prepay allows users who are less engaged in the category to save money and use more basic mobiles

Markets outside Japan often heavily subsidise handsets, with over ½ being free to consumers in some countries



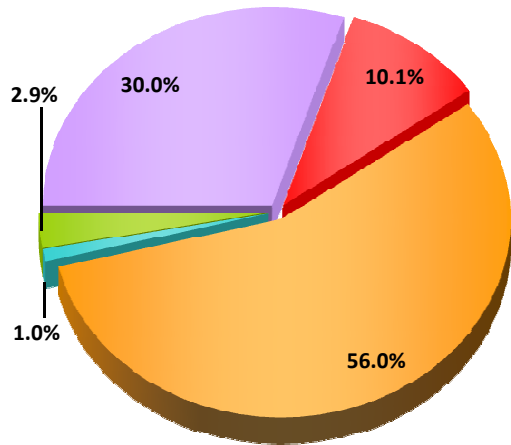
Different brands appeal to different consumers in different countries.



Youngest owners (16-24)	LG	LG	Sony Ericsson	Sony Ericsson	HTC	Apple	Samsung	Nokia	Motorola	Apple
Oldest owners (65+)	Nokia	Motorola	Nokia	Nokia	BlackBerry	BlackBerry	Motorola	Samsung	Motorola	HTC
Most female brand	LG	LG	Motorola	Sony Ericsson	Samsung	Apple	Apple	Motorola	Motorola	Sharp
Most male brand	HTC	Motorola	HTC	HTC	HTC	HTC	HTC	BlackBerry	Nokia	HTC
Biggest ARPU age group	35 to 49	25 to 34	25 to 34	25 to 34	50 to 64	25 to 34	50 to 64	35 to 49	35 to 49	16 to 24
Biggest ARPU gender	Female	Female	Female	Male	Male	Female	Female	Male	Female	Male
Highest handset spend age group	16 to 24	16 to 24	16 to 24	50 to 64	16 to 24	35 to 49	16 to 24	25 to 34	25 to 34	16 to 24
Highest handset spend by gender	Male	Male	Male	Male	Male	Male	Female	Male	Male	Female

Distribution channels vary hugely by county, and not just as a result of low/high internet penetration

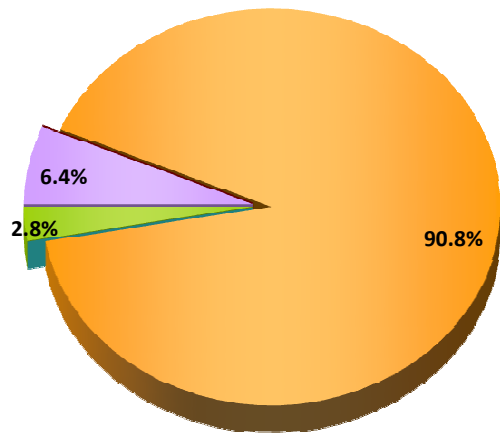
Big 5 Europe



- Over the Internet
- Over the telephone
- In a shop
- Mail order
- Other



Japan



- Over the Internet
- Over the telephone
- In a shop
- Mail order
- Other



So...the Japanese mobile market still has key differences, but these are reducing as the Japanese and Western markets borrow ideas from each other.

However, Japan is not alone.
All countries are different.



Country trends within Europe/US/Asia vary hugely, and no strategy fits more than one market.

Knowing each country's trends/influences is key to success.