Consumer Attitudes and Online Retail Dynamics in Japan, 2014-2019

Description:
Online retailing in Japan will register healthy growth, on the back of rising internet penetration and the growing adoption of smart handheld devices. Demographics and changing consumer lifestyles compel retailers to enter into and expand their online presence in Japan. The recession and disaster squeezed Japanese disposable income and consumers are turning more and more price sensitive, seeking better pricing and convenience. A hike in consumption tax in 2014 and an expected tax hike in 2017 will lead Japanese to tighten their purse strings further. As a result, online retailers have started to attract consumers by providing low prices, free and quick delivery services, which is expected to supplement the growth in future.

Key Findings
- Online retailing has high potential compared to conventional channels, and is expected to grow at a CAGR of 9.7% over the forecast period
- The aging population does however, provide an opportunity for retailers to improve their falling revenues and look for newer avenues of growth, as Japan's elderly have emerged as big spenders
- Consumers seek flexibility in payment when buying online, however credit/debit cards are the preferred payment methods among the shoppers
- Electrical and electronics will continue to lead with a share of 16.9% of the overall online market in 2019, and health and beauty is expected to be the fastest growing category, with a CAGR of 16.2% over 2014-2019

Synopsis
"Consumer Attitudes and Online Retail Dynamics in Japan, 2014-2019" provides data for historic and forecast online retail sales, and also includes information on the business environment and country risk related to Japan's online retail environment. In addition, it analyses the key consumer trends influencing Japan's online retail industry.

What else does this report offer?
- It provides in-depth analysis of the latest trends in online consumer shopping, covering the factors driving online shopping, consumer insights, market dynamics (covering 26 product categories), and reviews of the latest best practice in online retail site design
- Market insights based on consumer trends, changing economic and demographic factors, and other macroeconomic factors
- Based on the latest data, the report not only provides details of the size and growth of this increasingly important channel, it also provides essential context on the penetration of online sales by product groups, how growth has developed over time, and key factors, with forecasts, that will drive this market in the future

Reasons To Buy
- Understand which products will be the major winners and losers in the online arena in the coming years
- Get an in-depth analysis of the latest trends in online retailing in Japan, covering the factors driving online spending across the categories
- Learn from best practice approaches outlined in the case studies of leading online retailers by examining their unique retailing attitudes and reviewing innovative retailers, which provides insights and ideas to
remain competitive and profitable

Contents:
1 Introduction
1.1 What is this Report About?
2 Executive Summary
3 Market at a glance
4 Consumer Insight: Online Shopping Attitudes and Behaviors
4.1 Overview of Japan's Online Shopping Environment
4.1.1 Growing internet penetration acting as a catalyst for emerging online shopping market
4.1.2 Fixed broadband penetration increasing at a steady rate
4.1.3 Increasing use of mobile Internet will boost mobile shopping
4.2 Consumer Attitudes and Behavior
4.2.1 Food and Beverage - Purchase route shifting from brick to click
4.2.2 Aging population becoming more familiar to the digital world
4.2.3 Smaller households and increase in working women population boost online retailing
4.2.4 Increasing use of smart phones as a medium for shopping
4.2.5 Offline retailers are playing catch-up in the online market
4.2.6 Retailers influencing customers' purchase decisions through faster and free delivery plans
4.2.7 Mobile phone apps helps retailers to enhance shopping experience and boost sales
4.2.8 The increase in sales tax might force price sensitive consumers to look online
4.2.9 Payment through credit/debit cards are most favored among shoppers
5 Online Channel Dynamics
5.1 The Online Channel's Share of Total Retail Sales
5.1.1 Japan online vs. offline channel forecasts
5.1.2 Online penetration: global and regional comparisons
5.2 Channel Dynamics
5.2.1 Japan retail channel dynamics - future performance
5.2.2 Channel group share development
5.2.3 Individual channel performance
5.3 Category Dynamics
5.3.1 Online vs. offline retail sales comparison by category group, 2014
5.3.2 Online retail market dynamics by category
5.3.3 Online retail sales share by category group
5.3.4 Online retail sales growth by individual category
5.3.5 Food and grocery categories: market size and forecasts
5.3.6 Electrical and Electronics categories: market size and forecasts
5.3.7 Music, video, and entertainment software categories: market size and forecasts
5.3.8 Apparel, accessories, luggage and leather goods categories: size and forecasts
5.3.9 Books, News and Stationery categories: Market Size and Forecasts
5.3.10 Sports and Leisure equipment categories: market size and forecasts
5.3.11 Furniture and floor coverings categories: market size and forecasts
5.3.12 Home and Garden categories: market size and forecasts
5.3.13 Health and Beauty categories: market size and forecasts
6 Case Studies: Leading Online Retailers in Japan
6.1 Retailer 1: Rakuten
6.1.1 Business Description
6.1.2 Site Experience
6.2 Retailer 2: Zozotown
6.2.1 Business Description
6.2.2 Site Experience
6.3 Retailer 3: Joshin Denki
6.3.1 Business Description
6.3.2 Site Experience
6.4 Retailer 4: Locondo.jp
6.4.1 Business Description
6.4.2 Site Experience
6.5 Other Innovative Retailers in Japan
6.5.1 Oisix - popular as organic food online retailer
6.5.2 Seiyu - aims to be the largest online supermarket with the lowest cost
6.5.3 Rakuten launches its own app store
7 Appendix
7.1 Definitions
7.1.1 This report provides 2014 actual sales; while forecasts are provided for 2015 - 2019

7.2 Summary Methodology

7.2.1 Overview

7.2.2 The triangulated market sizing method

7.2.3 Industry surveys in the creation of retail market data

7.2.4 Quality control and standardized processes

7.3 About

7.4 Disclaimer

Table 1: Online Retail Sales in Japan, 2014 and 2019
Table 2: Japan Online vs. Offline Retail Sales and Forecast (JPY billion), 2009-2019
Table 3: Japan Online vs. Offline Retail Sales and Forecast (US$ billion), 2009-2019
Table 4: Japan Online vs. Offline Retail Sales and Forecast (% Share), 2009-2019
Table 5: Japan Online Sales vs. Global Average, 2009, 2014 and 2019
Table 6: Japan Online Sales vs. Asia-Pacific, 2009, 2014 and 2019
Table 7: Japan Overall Retail Segmentation (JPY billion) by Channel Group, 2009-2019
Table 8: Japan Channel Retail Sales and Forecast (JPY billion) by Channel Group, 2009-2019
Table 9: Japan Channel Retail Sales and Forecast (US$ billion) by Channel Group, 2009-2019
Table 10: Japan Channel Retail Sales and Forecast (% Share) by Channel Group, 2009-2019
Table 11: Japan Channel Retail Sales and Forecast (JPY billion) by Channel, 2009-2019
Table 12: Japan Channel Retail Sales and Forecast (US$ billion) by Channel, 2009-2019
Table 13: Japan Retail Sales Split (JPY million), Online vs. Offline, 2014
Table 14: Japan Retail Sales Split (US$ million), Online vs. Offline, 2014
Table 15: Japan Online Market Dynamics by Category Group, 2009-2019
Table 16: Japan Online Retail Sales and Forecast (JPY million) by Category Group, 2009-2019
Table 17: Japan Online Retail Sales and Forecast (US$ million) by Category Group, 2009-2019
Table 18: Japan Total and Online Retail Sales in Food and Grocery Categories (JPY million), 2009-2019
Table 19: Japan Total and Online Retail Sales in Food and Grocery Categories (US$ million), 2009-2019
Table 20: Japan Total and Online Retail Sales in Electrical and Electronics Categories (JPY million), 2009-2019
Table 21: Japan Total and Online Retail Sales in Electrical and Electronics Categories (US$ million), 2009-2019
Table 22: Japan Total and Online Retail Sales in Music, Video and Entertainment Categories (JPY million), 2009-2019
Table 23: Japan Total and Online Retail Sales in Music, Video and Entertainment Categories (US$ million), 2009-2019
Table 24: Japan Total and Online Retail Sales in Apparel, Accessories, Luggage and Leather Categories (JPY million), 2009-2019
Table 25: Japan Total and Online Retail Sales in Apparel, Accessories, Luggage and Leather Categories (US$ million), 2009-2019
Table 26: Japan Total and Online Retail Sales in Books, News and Stationery Categories (JPY million), 2009-2019
Table 27: Japan Total and Online Retail Sales in Books, News and Stationery Categories (US$ million), 2009-2019
Table 28: Japan Total and Online Retail Sales in Sports and Leisure Equipment Categories (JPY million), 2009-2019
Table 29: Japan Total and Online Retail Sales in Sports and Leisure Equipment Categories (US$ million), 2009-2019
Table 30: Japan Total and Online Retail Sales in Furniture and Floor Coverings Categories (JPY million), 2009-2019
Table 31: Japan Total and Online Retail Sales in Furniture and Floor Coverings Categories (US$ million), 2009-2019
Table 32: Japan Total and Online Retail Sales in Home and Garden Products Categories (JPY million), 2009-2019
Table 33: Japan Total and Online Retail Sales in Home and Garden Products Categories (US$ million), 2009-2019
Table 34: Japan Total and Online Retail Sales in Health and Beauty Categories (JPY million), 2009-2019
Table 35: Japan Total and Online Retail Sales in Health and Beauty Categories (US$ million), 2009-2019
Table 36: Japan Exchange Rate JPY-US$ (Annual Average), 2009-2014
Table 37: Japan Exchange Rate JPY-US$ (Annual Average), 2015-2019 Forecasts
Table 38: Retail Channel Definitions
Table 39: Retail Category Definitions

Figure 1: Share of Online Retail Sales in Total Retail Sales, 2014 and 2019
Figure 2: Japan GDP Growth Rate, 2009-2014
Figure 3: Total Internet Users and Penetration, 2009-2014
Figure 4: Total Fixed Broadband Subscribers and Penetration, 2009-2014
Figure 5: Mobile Phone Subscribers and Penetration, 2009-2014
Figure 6: Smart Phone Users, 2014-2018
Figure 7: Food and Beverage - Purchase Route Shifting to Online
Figure 8: Percentage of Private Households by Family Type
Figure 9: Smartphone App for Social Sharing of User Generated Looks
Figure 10: Payment Methods in Japan, 2014
Figure 11: Regional Mobile Broadband Users and its Penetration, 2012 and 2017
Figure 12: Regional Mobile Broadband Users and its Penetration, 2012 and 2017
Figure 13: Japan Online and Offline Retail Sales and Forecast (JPY billion), 2009-2019
Figure 14: Japan Online Sales vs. Global Average (% of Total Retail), 2009, 2014 and 2019
Figure 15: Japan Online Sales vs. Asia-Pacific Countries Average (% of Total Retail)
Figure 16: Japan Overall Retail Market Dynamics by Channel Group, 2009-2019
Figure 17: Japan Retail Sales and Forecast (JPY billion) by Channel Group, 2009-2019
Figure 18: Japan Retail Sales, Online vs. Offline, 2014
Figure 19: Japan Online Market Dynamics by Category Group, 2009-2019
Figure 20: Japan Online Retail Sales and Forecast (JPY million) by Category Group, 2009-2019
Figure 21: Rakuten: Home Page
Figure 22: Rakuten: Retailer page
Figure 23: Rakuten: Product Comparison
Figure 24: Rakuten: M-commerce app
Figure 25: Zozotown: Home Page
Figure 26: Zozotown: Product View
Figure 27: Zozotown: Product Filters
Figure 28: Zozotown: Customer reviews
Figure 29: Zozotown: Mobile Commerce App
Figure 30: Joshin Stores: Homepage
Figure 31: Joshin Stores: Organization and layout
Figure 32: Joshin Stores: Payment Methods and Shipment
Figure 33: Joshin Stores: Compare products
Figure 34: Joshin Stores: Installation charges
Figure 35: Locondo: Homepage
Figure 36: Locondo: Organization and layout
Figure 37: Locondo: Locondo Point Club
Figure 38: Locondo: Customer reviews
Figure 39: Locondo: Delivery and return policies
Figure 40: Oisix: Home Page
Figure 41: Seiyu-Dena Ties to Redesign Seiyu Net Super
Figure 42: Rakuten App Ichiba- Rakuten's own Android App Store
Figure 43: The Triangulated Market Sizing Methodology

Ordering:
Order Online - http://www.researchandmarkets.com/reports/3509759/
Order by Fax - using the form below
Order by Post - print the order form below and send to

Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

- **Product Name:** Consumer Attitudes and Online Retail Dynamics in Japan, 2014-2019
- **Web Address:** [http://www.researchandmarkets.com/reports/3509759/](http://www.researchandmarkets.com/reports/3509759/)
- **Office Code:** SCH3FG93

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Format Type</th>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF) - Single User</td>
<td></td>
<td>USD 1450</td>
</tr>
<tr>
<td>Electronic (PDF) - Site License</td>
<td></td>
<td>USD 2900</td>
</tr>
<tr>
<td>Electronic (PDF) - Enterprisewide</td>
<td></td>
<td>USD 4350</td>
</tr>
</tbody>
</table>

Contact Information
Please enter all the information below in **BLOCK CAPITALS**

- **Title:** [Mr] [Mrs] [Dr] [Miss] [Ms] [Prof]
- **First Name:** ___________________________  **Last Name:** ___________________________
- **Email Address:** * ___________________________
- **Job Title:** ___________________________
- **Organisation:** ___________________________
- **Address:** ___________________________
- **City:** ___________________________
- **Postal / Zip Code:** ___________________________
- **Country:** ___________________________
- **Phone Number:** ___________________________
- **Fax Number:** ___________________________

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:
Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:
Account number 833 130 83
Sort code 98-53-30
Swift code ULSBIE2D
IBAN number IE78ULSB98533083313083
Bank Address Ulster Bank,
27-35 Main Street,
Blackrock,
Co. Dublin,
Ireland.

If you have a Marketing Code please enter it below:

Marketing Code: __________________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp