Esportare in Digitale





DIGITAL JAPAN

Marco Massarotto Founder & CEO NIPPON CONCIÈRGE **Partner EAST MEDIA**

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MARCO MASSAROTTO

A digital "Entrepioneer" with 25+ years experience in digital communication in multinational agencies and as entrepreneur for blue chip corporations and national institutions. Book author, teacher, executive advisor and keynote speaker on digital, communication, reputation.

A multicultural and sustainability certified expert founder of a mountain leadership academy for corporations, executives and young leaders.

15+ years Japan expert in international business relations and marketing and in sake, travel and culture.

Personal website & books:

www.marcomassarotto.com

Agency: www.kaiwa.it

Leadership & Sustainability Center

www.cortina.academy

Tour Operator and Consulting: www.nipponconcierge.com

JAPAN BUSINESS AND EXPERIENCE DESIGNER



CULTURE, LEADERSHIP & SUSTAINABILITY ADVISOR





DIGITAL COMMUNICATION & STRATEGY "ENTREPIONEEER"













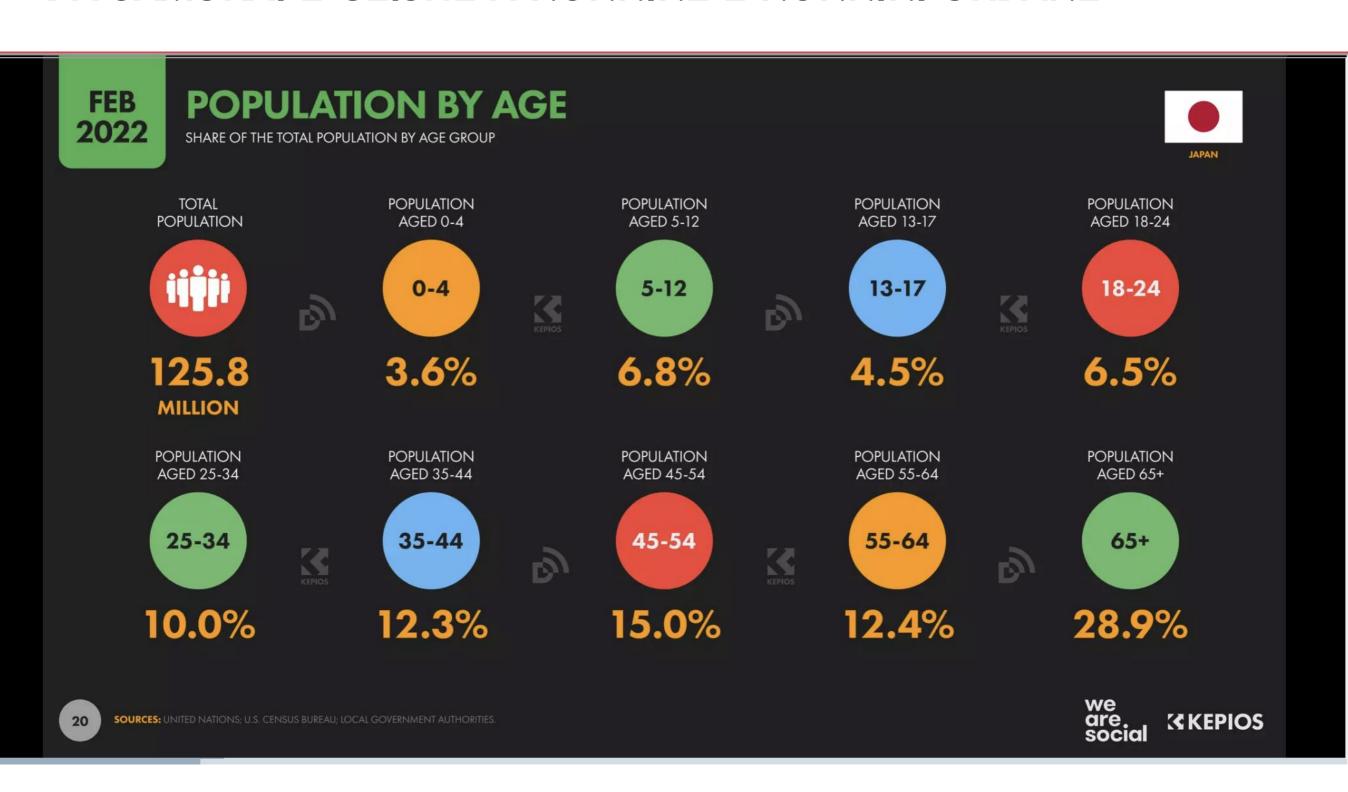
THE EAST SIDE OF DIGITAL

Dal 2013 siamo la prima agenzia italiana specializzata in Digital Marketing ed e-commerce per la Cina e il Far East. Dal 2018 siamo parte di Triboo, gruppo quotato nel mercato azionario EuroNext Milan.

Grazie al team multiculturale nelle nostre sedi di **Milano** e **Shanghai** e al presidio in Corea, Giappone e Thailandia supportiamo le aziende nel loro processo di internazionalizzazione nei mercati del Far East.



DA SAMURAI E GEISHE A NONNINE E NONNINI URBANE



GIAPPONE: PIÙ SMARTPHONE CHE ABITANTI

FEB ESSENTIAL DIGITAL HEADLINES 2022 OVERVIEW OF THE ADOPTION AND USE OF CONNECTED DEVICES AND SERVICES TOTAL **CELLULAR MOBILE ACTIVE SOCIAL** INTERNET **POPULATION** CONNECTIONS **USERS MEDIA USERS** 阳 125.8 202.1 118.3 102.0 MILLION MILLION MILLION MILLION **URBANISATION** vs. POPULATION vs. POPULATION vs. POPULATION **92.0**% 160.6% 94.0% 81.1% CELLULAR MOBILE CONNECTIONS ACTIVE SOCIAL MEDIA USERS SOURCES: UNITED NATIONS; U.S. CENSUS BUREAU; GOVERNMENT BODIES; (**KEPIOS** EARNINGS REPORTS; OCDH; TECHRASA; KEPIOS ANALYSIS, ADVISORY: SOCIA ENT UNIQUE INDIVIDUALS. COMPARABILITY: SOURCE AND BASE CHANGES.

YEAR-ON-YEAR CHANGE

+8.2 MILLION

+2.7%

YEAR-ON-YEAR CHANGE

+5.3 MILLION

ALWAYS ON

FEB 2022

DAILY TIME SPENT WITH MEDIA

THE AVERAGE AMOUNT OF TIME EACH DAY THAT INTERNET USERS AGED 16 TO 64 SPEND WITH DIFFERENT KINDS OF MEDIA AND DEVICES

GWI.



TIME SPENT USING THE INTERNET



4H 26M

YEAR-ON-YEAR CHANGE +0.4% (+1 MIN)

TIME SPENT LISTENING TO MUSIC STREAMING SERVICES



OH 27M

YEAR-ON-YEAR CHANGE -3.6% (-1 MIN)

TIME SPENT WATCHING TELEVISION (BROADCAST AND STREAMING)



2H 15M

YEAR-ON-YEAR CHANGE -4.3% (-6 MINS)

TIME SPENT LISTENING TO BROADCAST RADIO



OH 30M

YEAR-ON-YEAR CHANGE +3.4% (+1 MIN)

TIME SPENT USING SOCIAL MEDIA



OH 51M

YEAR-ON-YEAR CHANGE [UNCHANGED]

TIME SPENT LISTENING
TO PODCASTS



OH 12M

YEAR-ON-YEAR CHANGE +9.1% (+1 MIN)

TIME SPENT READING PRESS MEDIA (ONLINE AND PHYSICAL PRINT)



GWI.

OH 35M

YEAR-ON-YEAR CHANGE -14.6% (-6 MINS)

TIME SPENT USING A GAMES CONSOLE



OH 30M

YEAR-ON-YEAR CHANGE -11.8% (-4 MINS)

SOURCE: GWI (Q3 2021). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR FULL DETAILS. NOTES: CONSUMPTION OF DIFFERENT MEDIA MAY OCCUR CONCURRENTLY. TELEVISION INCLUDES BOTH LINEAR (BROADCAST AND CABLE) TELEVISION AND CONTENT DELIVERED VIA STREAMING AND VIDEO-ON-DEMAND SERVICES. PRESS INCLUDES BOTH ONLINE AND PHYSICAL PRINT MEDIA. BROADCAST RADIO DOES NOT INCLUDE INTERNET RADIO.

GWI.



KEPIOS

ALWAYS ON

FEB 2022

OVERVIEW OF INTERNET USE

ESSENTIAL INDICATORS OF INTERNET ADOPTION AND USE

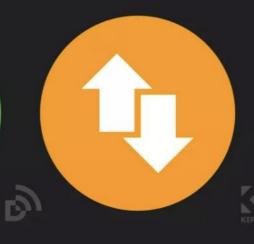


TOTAL INTERNET USERS INTERNET USERS AS A PERCENTAGE OF TOTAL POPULATION YEAR-ON-YEAR CHANGE IN THE NUMBER OF INTERNET USERS AVERAGE DAILY TIME SPENT USING THE INTERNET BY EACH INTERNET USER

PERCENTAGE OF USERS
ACCESSING THE INTERNET
VIA MOBILE PHONES











118.3 MILLION 94.0%

+0.7% +844 THOUSAND 4H 26M +0.4% (+1 MIN) 86.6%

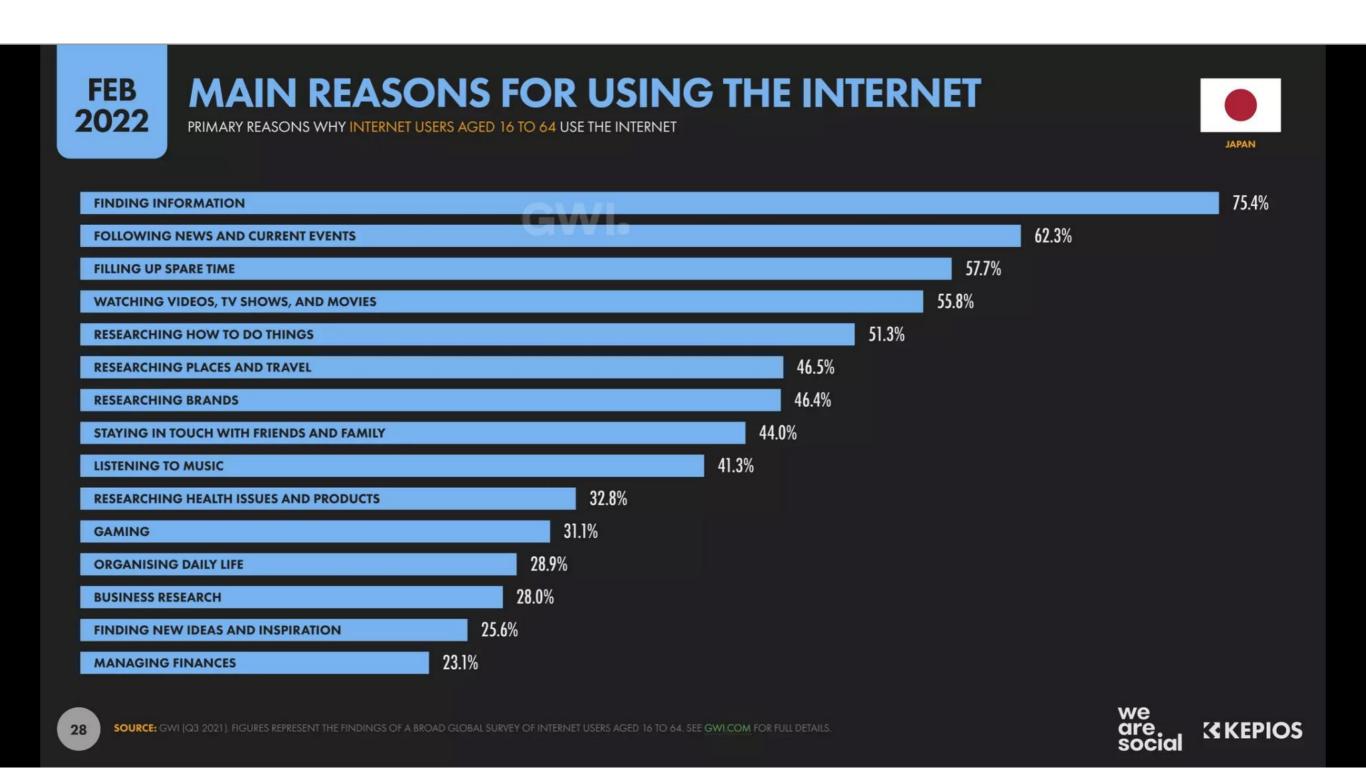


SOURCES: KEPIOS ANALYSIS; ITU; GSMA INTELLIGENCE; EUROSTAT; GWI; CIA WORLD FACTBOOK; CNNIC; APJII; LOCAL GOVERNMENT AUTHORITIES; UNITED NATIONS. TIME SPENT AND MOBILE SHARE DATA FROM GWI (Q3 2021), BASED ON A BROAD SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR MORE DETAILS. NOTES: "YOY" FIGURES SHOW YEAR-ON-YEAR GROWTH. FOR CHANGE IN TIME, "H" DENOTES HOURS AND "M" DENOTES MINUTES. ADVISORY: DUE TO COVID-19-RELATED DELAYS IN RESEARCH AND REPORTING, FIGURES FOR INTERNET USER GROWTH MAY UNDER-REPRESENT ACTUAL TRENDS. SEE NOTES ON DATA FOR MORE DETAILS. COMPARABILITY: SOURCE AND BASE CHANGES.



KEPIOS

USE: NEWS, VIDEOS, TUTORIAL, TRAVEL, FRIENDS...



SITES: SEARCH, SHOP, TWEET...

FEB 2022

MOST-VISITED WEBSITES: SEMRUSH RANKING

RANKING OF THE MOST-VISITED WEBSITES ACCORDING TO SEMRUSH, BASED ON TOTAL MONTHLY WEBSITE TRAFFIC IN NOVEMBER 2021



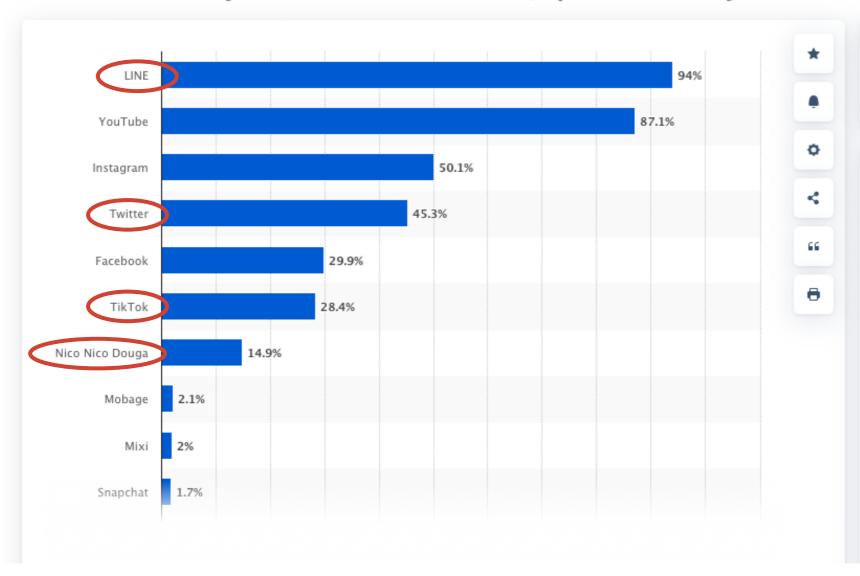
#	WEBSITE	TOTAL VISITS	UNIQUE VISITORS	TIME PER VISIT	PAGES PER VISIT
01	YAHOO.CO.JP	1.18B	53.1M	13M 42S	6.19
02	GOOGLE.COM	617M	33.5M	17M 55S	6.21
03	rakuten.co.jp	318M	40.4M	7M 00S	4.93
04	WIKIPEDIA.ORG	276M	43.4M	11M 37S	2.05
05	TWITTER.COM	247M	31.1M	16M 42S	5.99
06	SYOSETU.COM	235M	6.92M	13M 42S	11.13
07	AMAZON.CO.JP	229M	37.9M	12M 27S	6.12
08	LIVEDOOR.JP	161M	15.1M	12M 53S	4.11
09	PIXIV.NET	149M	14.1M	23M 30S	8.72
10	AMEBLO.JP	145M	23.9M	11M 13S	3.30

#	WEBSITE	TOTAL VISITS	UNIQUE VISITORS	TIME PER VISIT	PAGES PER VISIT
11	BLOG.JP	127M	14.8M	9M 25S	3.23
12	GOO.NE.JP	119M	28.7M	7M 00S	2.67
13	DOCOMO.NE.JP	104M	9.19M	11M 35S	4.26
14	DMM.CO.JP	96.4M	14.1M	10M 27S	6.99
15	YOUTUBE.COM	82.7M	13.9M	6M 26S	4.69
16	GOOGLE.CO.JP	82.1M	10.1M	16M 47S	7.42
17	PORNHUB.COM	74.9M	11.2M	17M 03S	8.40
18	FACEBOOK.COM	70.5M	17.5M	11M 40S	3.87
19	INSTAGRAM.COM	70.0M	15.4M	9M 49S	4.54
20	5CH.NET	69.9M	7.80M	17M 10S	4.29



SOCIAL MEDIA: OLD & NEW FACES

Most commonly used social media in Japan in fiscal year 2022





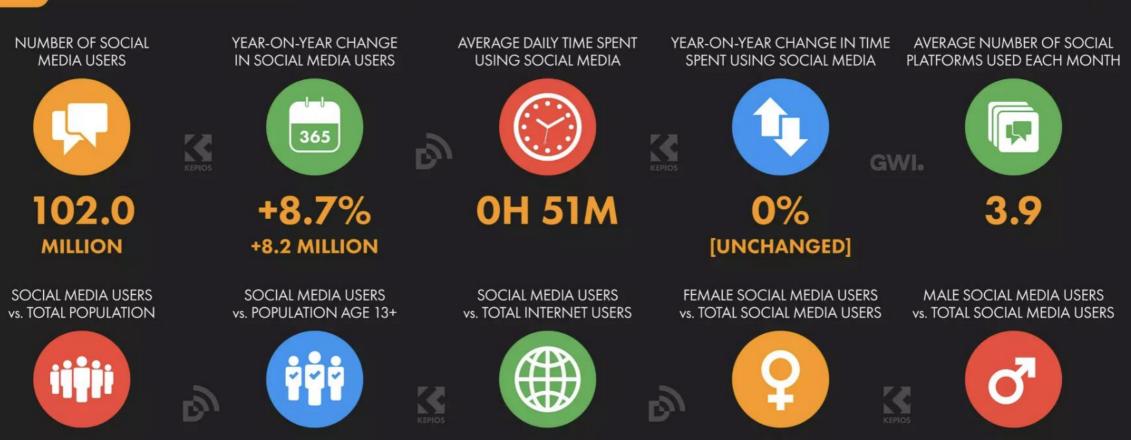
NOT SO SOCIAL...

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OVERVIEW OF SOCIAL MEDIA USE

HEADLINES FOR SOCIAL MEDIA ADOPTION AND USE (NOTE: USERS MAY NOT REPRESENT UNIQUE INDIVIDUALS)







81.1%

SOURCES: KEPIOS ANALYSIS; COMPANY ADVERTISING RESOURCES AND ANNOUNCEMENTS; CNNIC; TECHRASA; OCDH; U.N.; U.S. CENSUS BUREAU. DATA FOR TIME SPENT AND AVERAGE NUMBER OF PLATFORMS: GWI [Q3 2021]. SEE GWI.COM FOR MORE DETAILS. NOTE: FIGURE FOR "AVERAGE NUMBER OF SOCIAL PLATFORMS USED EACH MONTH" INCLUDES DATA FOR YOUTUBE. ADVISORY: SOCIAL MEDIA USERS MAY NOT REPRESENT UNIQUE INDIVIDUALS. FIGURES FOR REACH VS. POPULATION AND REACH VS. INTERNET USERS MAY EXCEED 100% DUE TO DUPLICATE AND FAKE ACCOUNTS, DELAYS IN DATA REPORTING, AND DIFFERENCES BETWEEN CENSUS COUNTS AND RESIDENT POPULATIONS. SEE NOTES ON DATA FOR FURTHER DETAILS.

90.5%

we are social

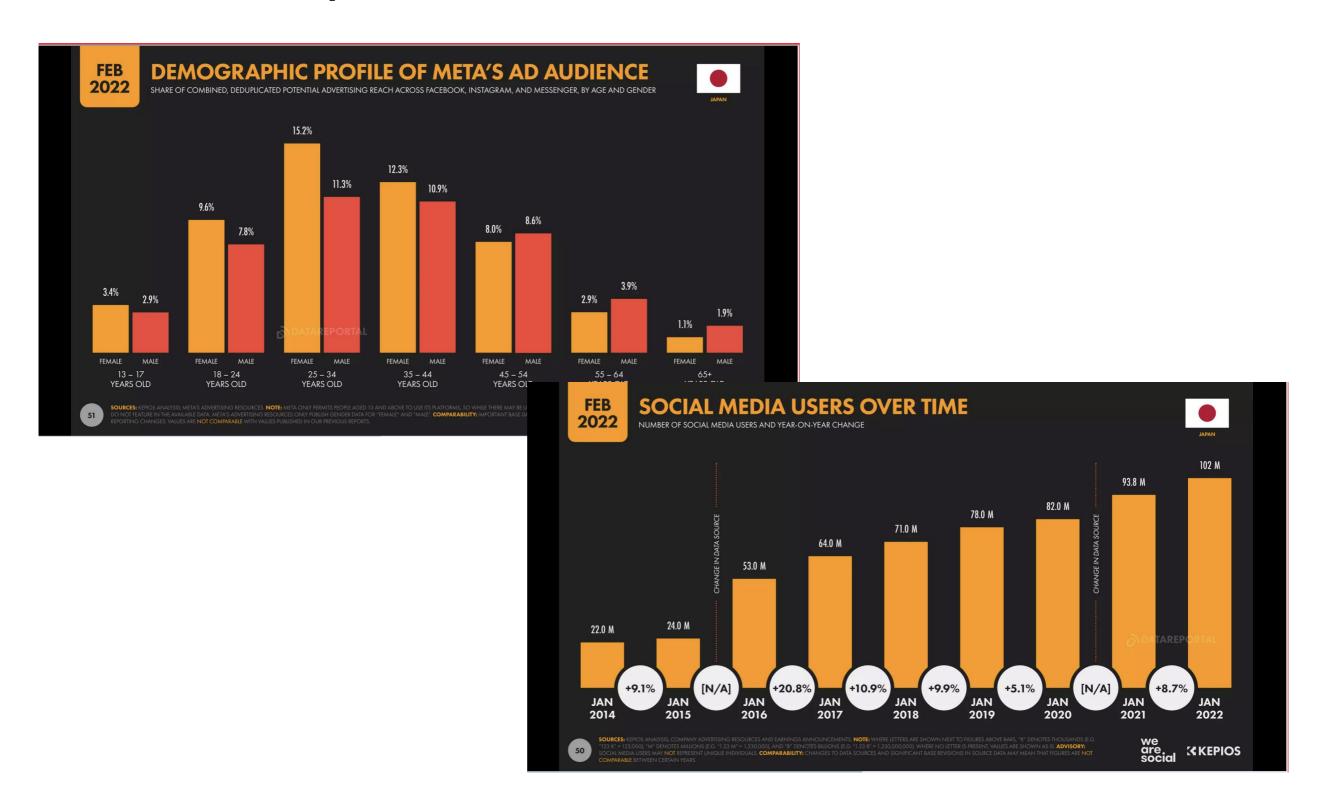
47.4%

52.6%

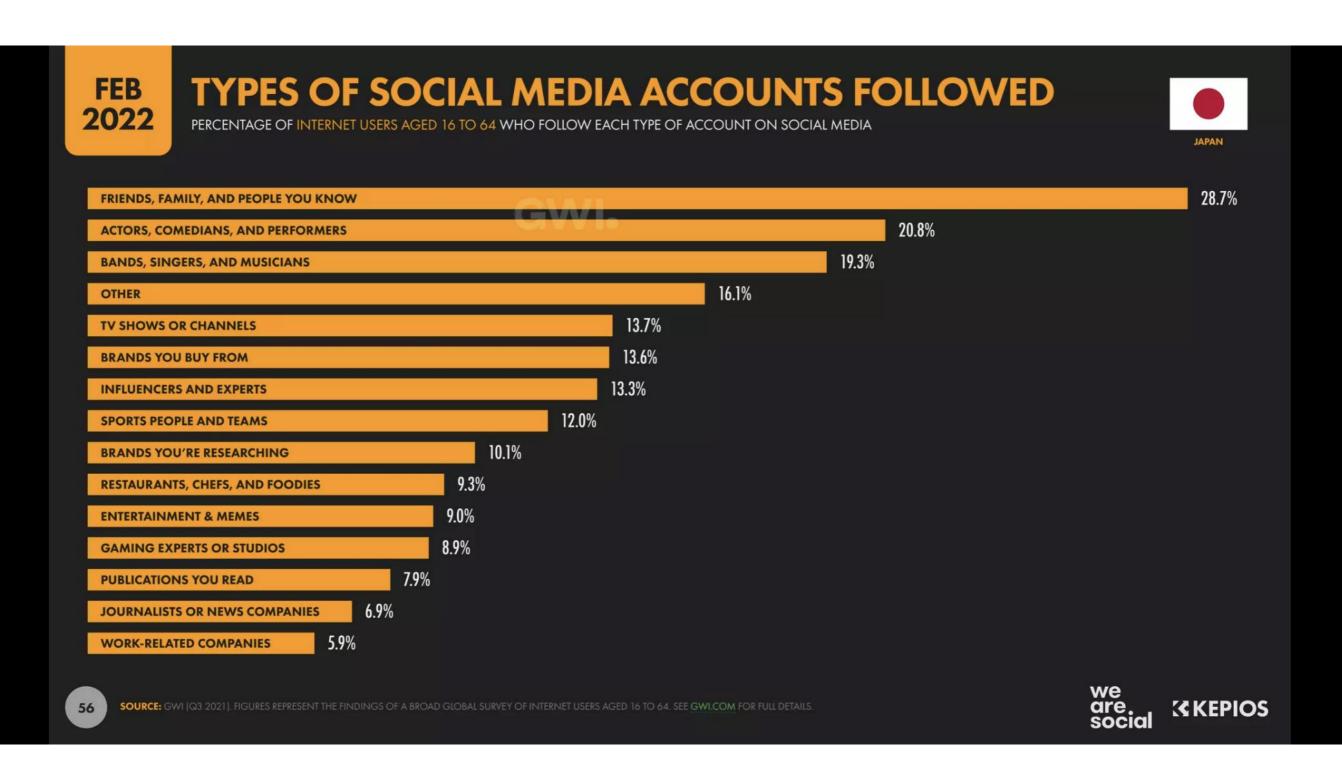
KEPIOS

86.2%

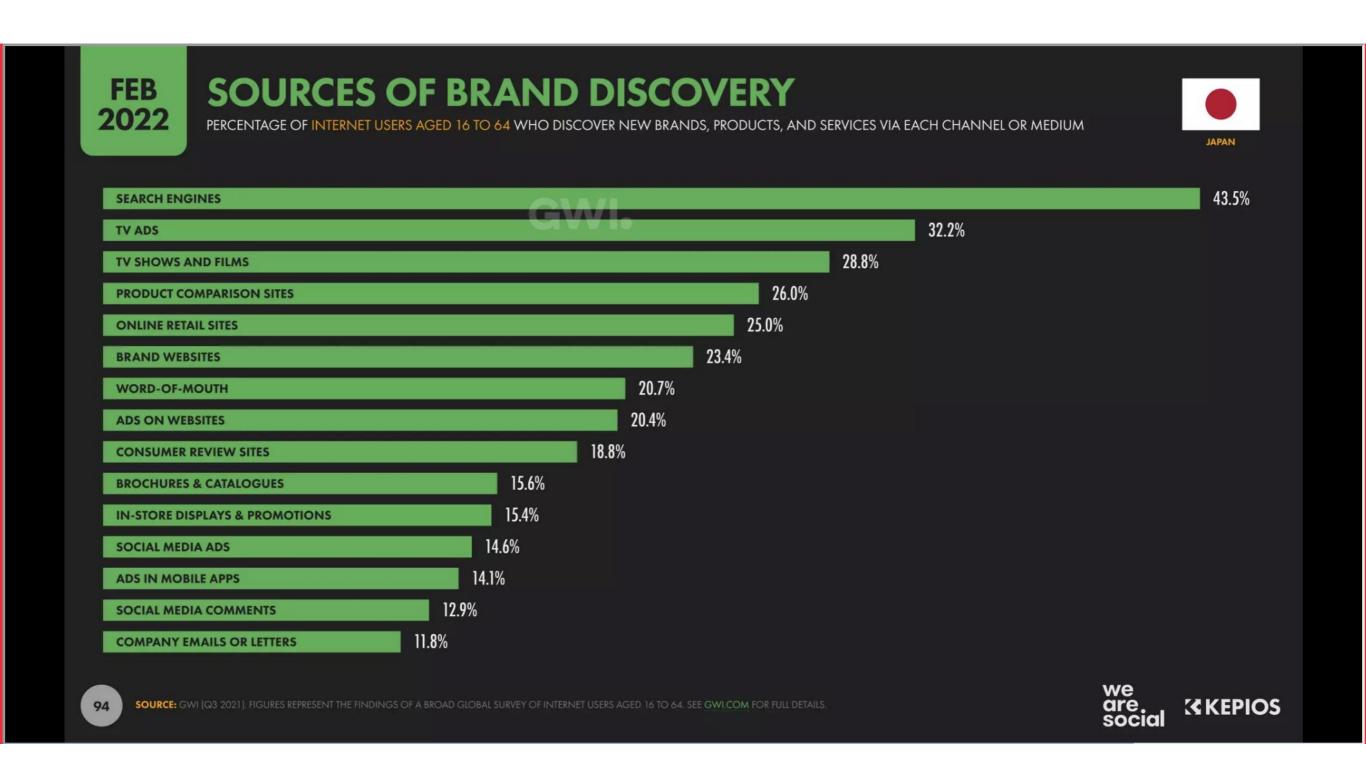
...but still with potential



FOLLO-WHO-ERS?



SEARCH & TV: THE HIGHWAYS FOR BRANDS



SEARCH & TV: THE HIGHWAYS FOR BRANDS

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ENGAGEMENT WITH DIGITAL MARKETING

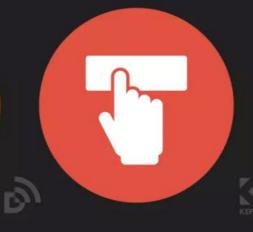
PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO SAY THEY ENGAGE IN EACH KIND OF ONLINE ACTIVITY



RESEARCH BRANDS ONLINE BEFORE MAKING A PURCHASE VISITED A BRAND'S WEBSITE IN THE PAST 30 DAYS CLICKED OR TAPPED ON A BANNER AD ON A WEBSITE IN THE PAST 30 DAYS CLICKED OR TAPPED ON A SPONSORED SOCIAL MEDIA POST IN THE PAST 30 DAYS DOWNLOADED OR USED A BRANDED MOBILE APP IN THE PAST 30 DAYS











55.1%

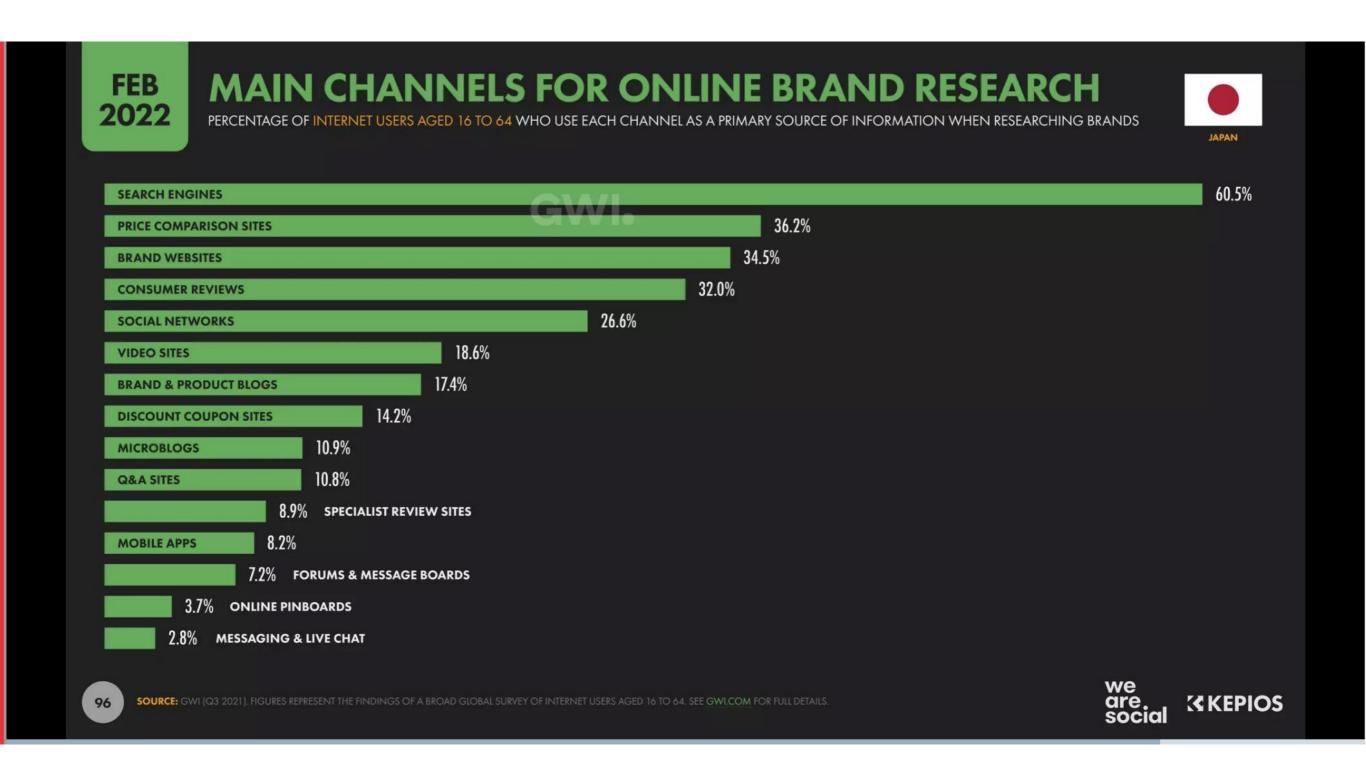
58.4%

10.6%

4.3%

6.5%

SEARCH & TV: THE HIGHWAYS FOR BRANDS



SEARCH ENGINES IN GIAPPONE



Motore di ricerca 100% straniero. Fornisce anche altri servizi come Gmail, Google Ads, Google Drive, Google Documents, ecc.

Usato maggiormente dagli utenti più giovani. La maggior parte dei giapponesi possiede un Iphone e usa Safari come Search Engine, che si appoggia a Google.



Nato da una joint-venture fra Yahoo! America e Softbank Japan.

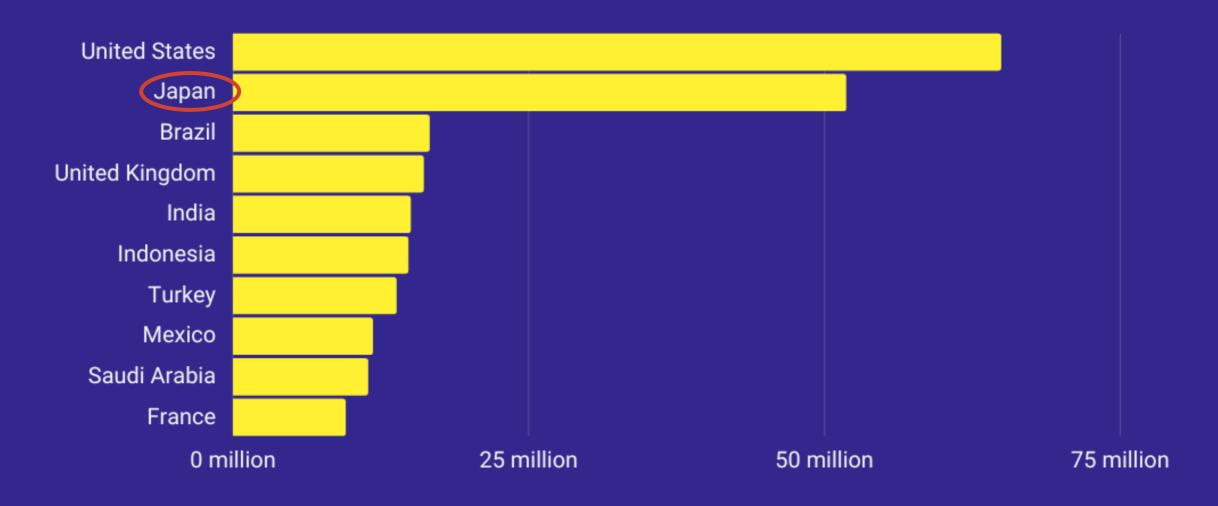
Yahoo! Japan fornisce anche altri servizi come "Yahoo! Auction", "Yahoo! Shopping" e "PayPay", il servizio di moneta virtuale e pagamento online più usato in Giappone. Usato maggiormente dagli utenti più anziani.



FIDUCIA

"Tsuittah": BIG IN JAPAN

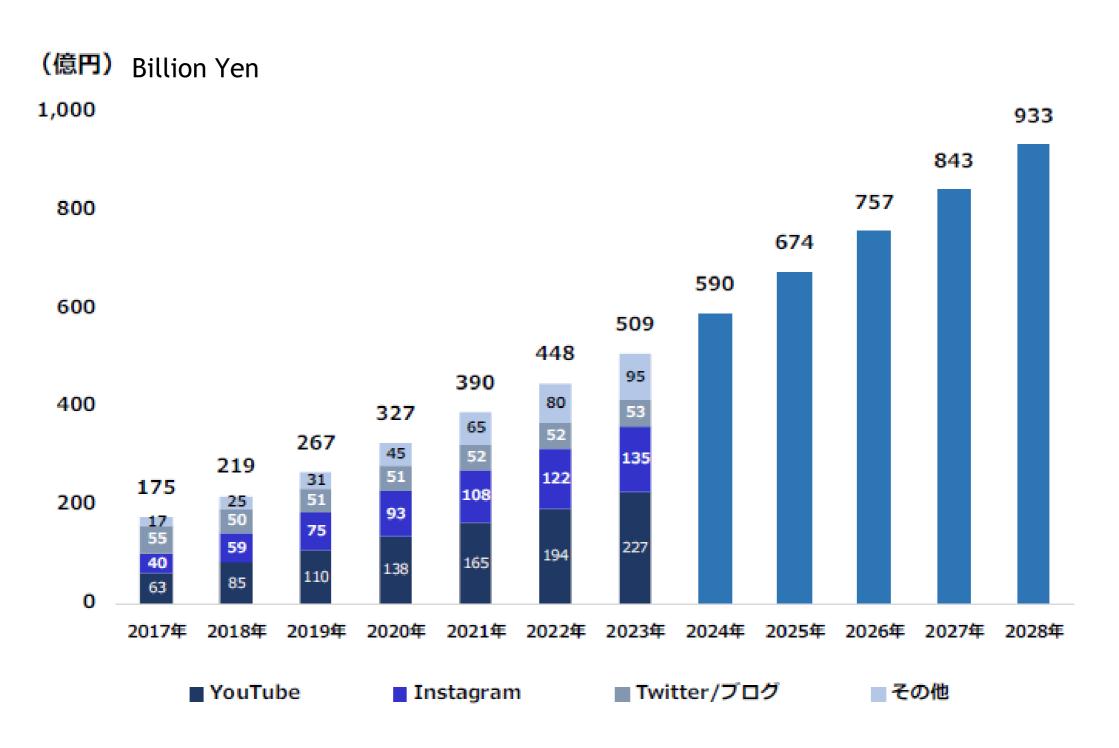
NUMBER OF TWITTER USERS BY COUNTRY



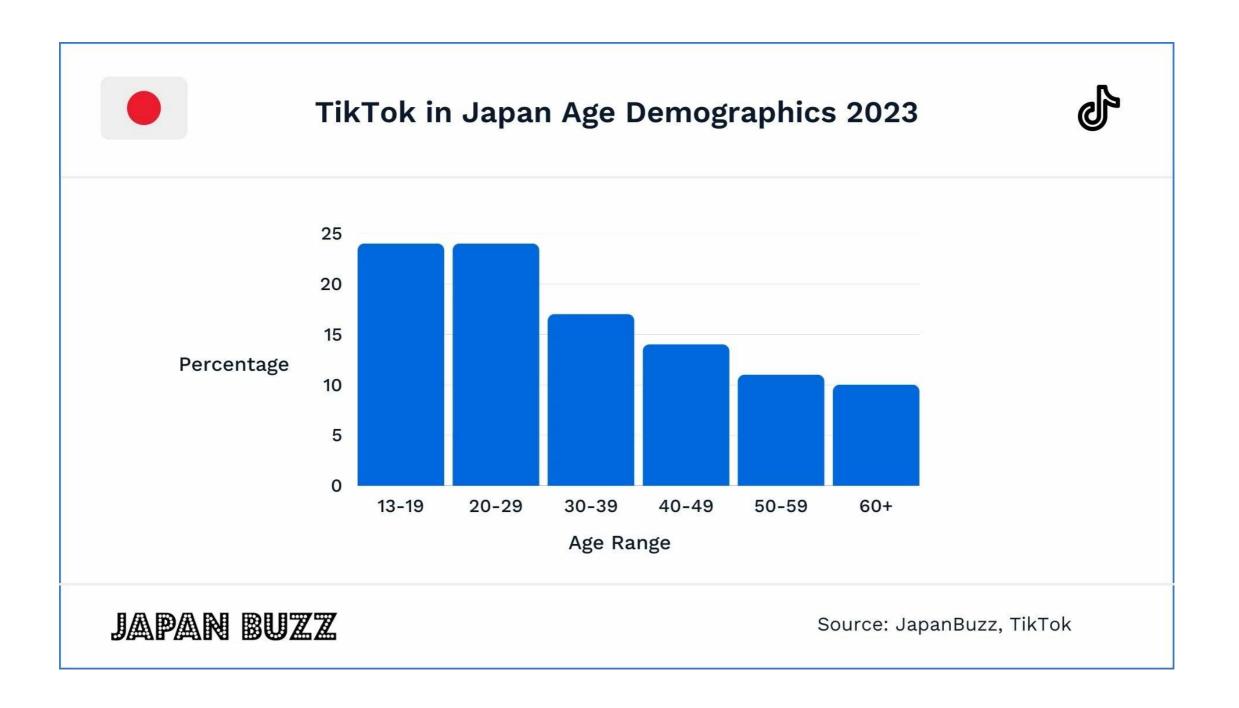


A LOT OF INFLUENCE ON INFLUENCERS

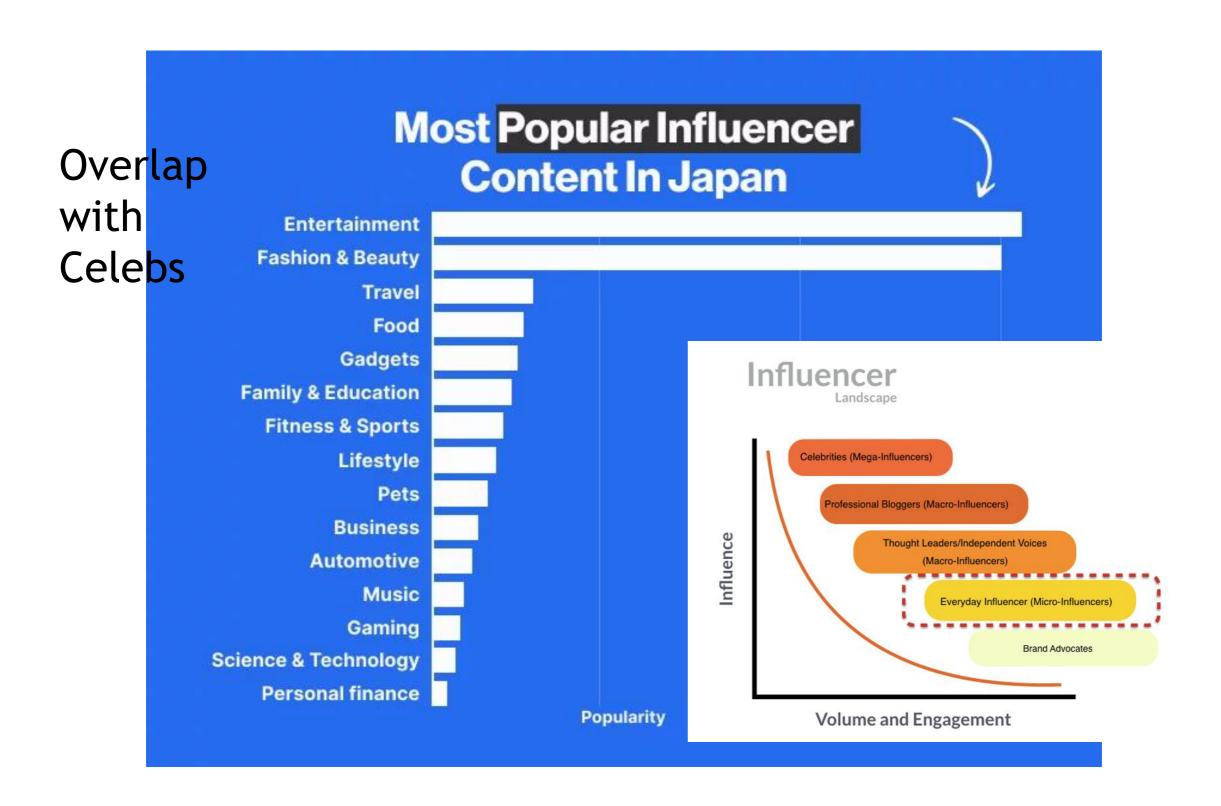
A massive number of Japanese people use social media, and for this reason influencer marketing is a growing market in Japan. Above is the market size of influencer marketing in Japan reported by Digital Infact on March 2019. According to this study, the market size of influencer marketing was about 17.5 billion yen in 2017 and about 21.9 billion yen in 2018. Looking at the future growth rate, it's predicted to grow to about 50.9 billion yen by 2023, and to about 93.3 billion yen by 2028, which is almost 1 trillion yen



A NEW GENERATION OF FOLLOWERS



NOYT FOR ALL SECTORS (YET?)

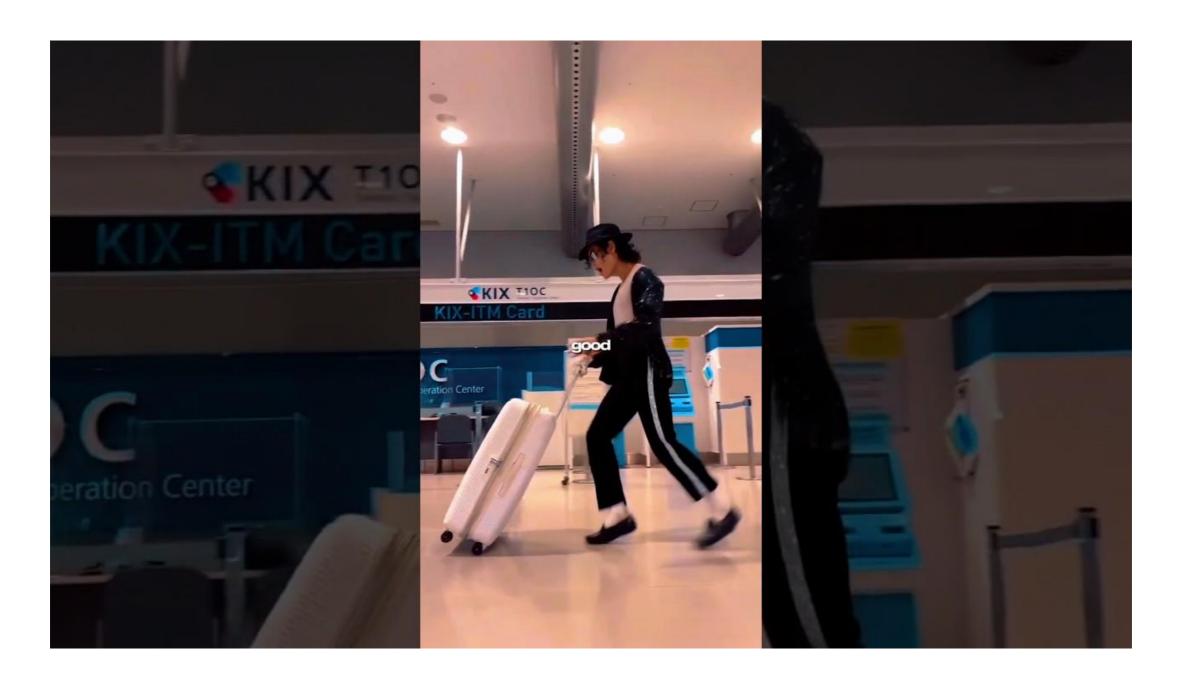


A DIFFERENT FLAVOUR





A DIFFERENT FLAVOUR



TOP 20 TIKTOK INFLUENCERS IN JAPAN

ALL IN LINE

FEB 2022

LINE: OVERVIEW OF ACTIVE USERS

NUMBER OF USER ACCOUNTS THAT ARE ACTIVE ON LINE EACH MONTH



NUMBER OF MONTHLY ACTIVE LINE USERS MONTHLY ACTIVE LINE USERS AS A PERCENTAGE OF TOTAL POPULATION

MONTHLY ACTIVE LINE USERS AS A PERCENTAGE OF TOTAL INTERNET USERS

PERCENTAGE OF LINE'S ACTIVE USER BASE THAT LINE REPORTS IS FEMALE

PERCENTAGE OF LINE'S ACTIVE USER BASE THAT LINE REPORTS IS MALE











89.0 MILLION

70.7%

75.3%

55.6%

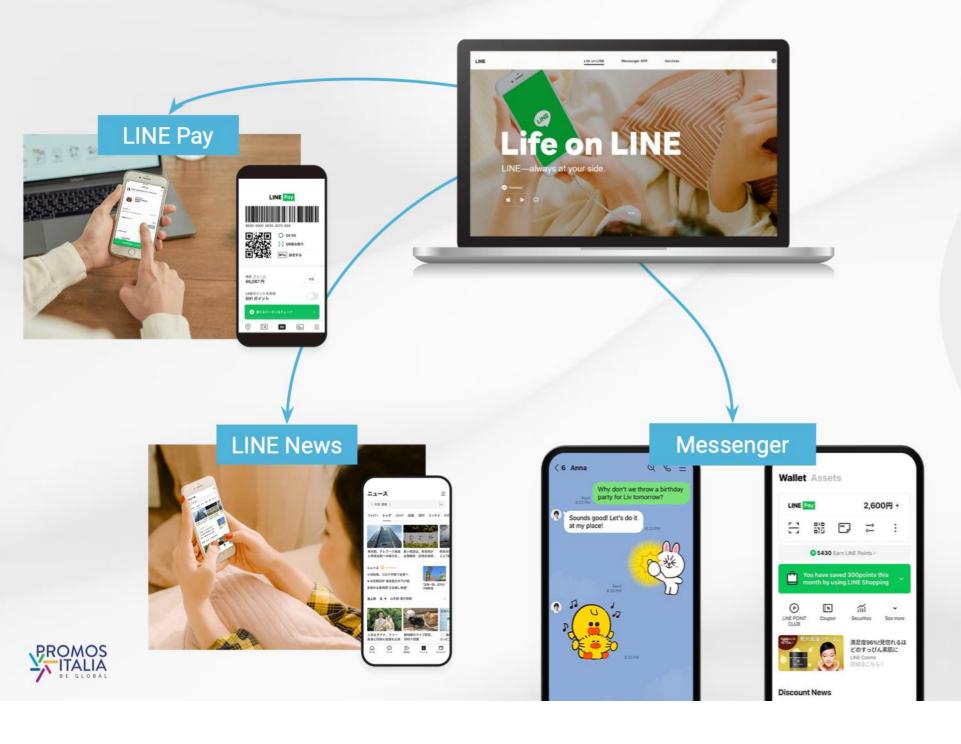
44.4%

SOURCE: LINE'S ADVERTISING RESOURCES.

we are social

KEPIOS

L'ECOSISTEMA DI LINE



L'app LINE include anche tutta una serie di altri servizi, che la rendono un vero e proprio ecosistema di piattaforme.

Tra questi abbiamo Line Pay, Line Today, Line Shopping, Line TV e Line Games.

EASTMEDIA

COME APPAIONO I SERVIZI DI LINE













VOOM (Timeline)

News

Wallet

Shopping

Gift

Stamp Shop



LINE PER I BUSINESS

ACCOUNT UFFICIALE











Su LINE i brand possono aprire un account ufficiale che permette di avere una **comunicazione diretta con gli utenti** (chiamati friends).

Welcome message personalizzato con coupon

Push message (messaggio personalizzato e/o coupon) Rich menù personalizzato Chatbot

Shop Card

APP: CHAT, SHOP, PAY, SAFE.

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APP ANNIE APP RANKING: ACTIVE USERS

JAPAN

APP ANNIE'S RANKING OF MOBILE APPS AND MOBILE GAMES BY AVERAGE NUMBER OF MONTHLY ACTIVE BETWEEN JANUARY AND DECEMBER 2021

#	MOBILE APP		COMPANY
01	LINE		LINE
02	新型コロナワクチン接種証明書アブ	ry A	CABINET OFFICE
03	INSTAGRAM		META
04	TWITTER		TWITTER
05	AMAZON		AMAZON
06	YAHOO! JAPAN		YAHOO JAPAN
07	FACEBOOK		META
08	PAYPAY		SOFTBANK
09	RAKUTEN ICHIBA		RAKUTEN
10	YAHOO! JAPAN WEATHER		YAHOO JAPAN

#	MOBILE GAME	COMPANY
01	DISNEY TSUM TSUM	LINE
02	POKÉMON GO	NIANTIC
03	MONSTER STRIKE	MIXI
04	PUZZLE & DRAGONS	GUNGHO ONLINE ENTERTAINMENT
05	UMA MUSUME PRETTY DERBY	CYBERAGENT
06	PIKMIN BLOOM	NIANTIC
07	機動戦士ガンダム U.C. ENGAGE	APP ANNIE BANDAI NAMCO
08	TOON BLAST	ZYNGA
09	PROJECT SEKAI COLORFUL STAGE! FEAT. HATSUNE MIKU	SEGA SAMMY
10	ドラゴンクエストけしケシ!	SQUARE ENIX



FEB 2022

ECOMMERCE: CONSUMER GOODS CATEGORIES

ANNUAL SPEND IN EACH CONSUMER GOODS ECOMMERCE CATEGORY (U.S. DOLLARS, B2C ONLY)







\$40.70 BILLION

YEAR-ON-YEAR CHANGE +29% (+\$9.1 BILLION)

FASHION



\$55.67 BILLION

YEAR-ON-YEAR CHANGE +36% (+\$15 BILLION)

FURNITURE



BILLION YEAR-ON-YEAR CHANGE +23% (+\$5.8 BILLION)

TOYS, HOBBY, DIY



statista 🔽

BILLION

YEAR-ON-YEAR CHANGE +35% (+\$4.3 BILLION)

PERSONAL & HOUSEHOLD CARE



\$25.27 BILLION

YEAR-ON-YEAR CHANGE +22% (+\$4.6 BILLION)

\$17.64 BILLION YEAR-ON-YEAR CHANGE

FOOD



+52% (+\$6.1 BILLION)

BEVERAGES



\$16.78 BILLION

YEAR-ON-YEAR CHANGE +59% (+\$6.2 BILLION)

PHYSICAL MEDIA



BILLION

YEAR-ON-YEAR CHANGE +13% (+\$715 MILLION)

we

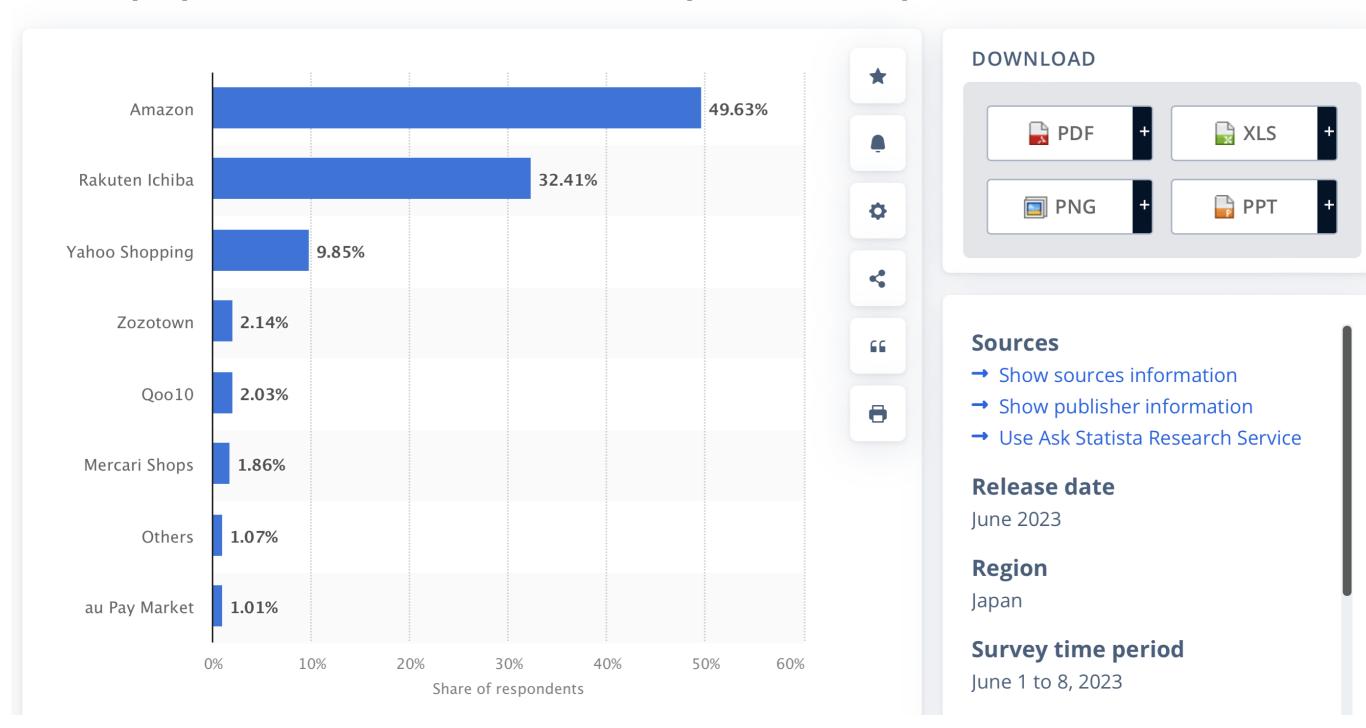
are.

social

KEPIOS



Most popular e-commerce marketplaces in Japan as of June 2023





2.03%

Qoo10

FEB 2022

DIGITAL MEDIA SPEND

ANNUAL SPEND ON DIGITAL MEDIA DOWNLOADS AND SUBSCRIPTIONS







VIDEO GAMES





EPUBLISHING



\$27.31 BILLION

YEAR-ON-YEAR CHANGE +12% (+\$3.0 BILLION)

\$19.66 BILLION

YEAR-ON-YEAR CHANGE +11% (+\$2.0 BILLION)

\$3.72 BILLION

YEAR-ON-YEAR CHANGE +15% (+\$499 MILLION) \$2.52 BILLION

YEAR-ON-YEAR CHANGE +13% (+\$286 MILLION) \$1.42 BILLION

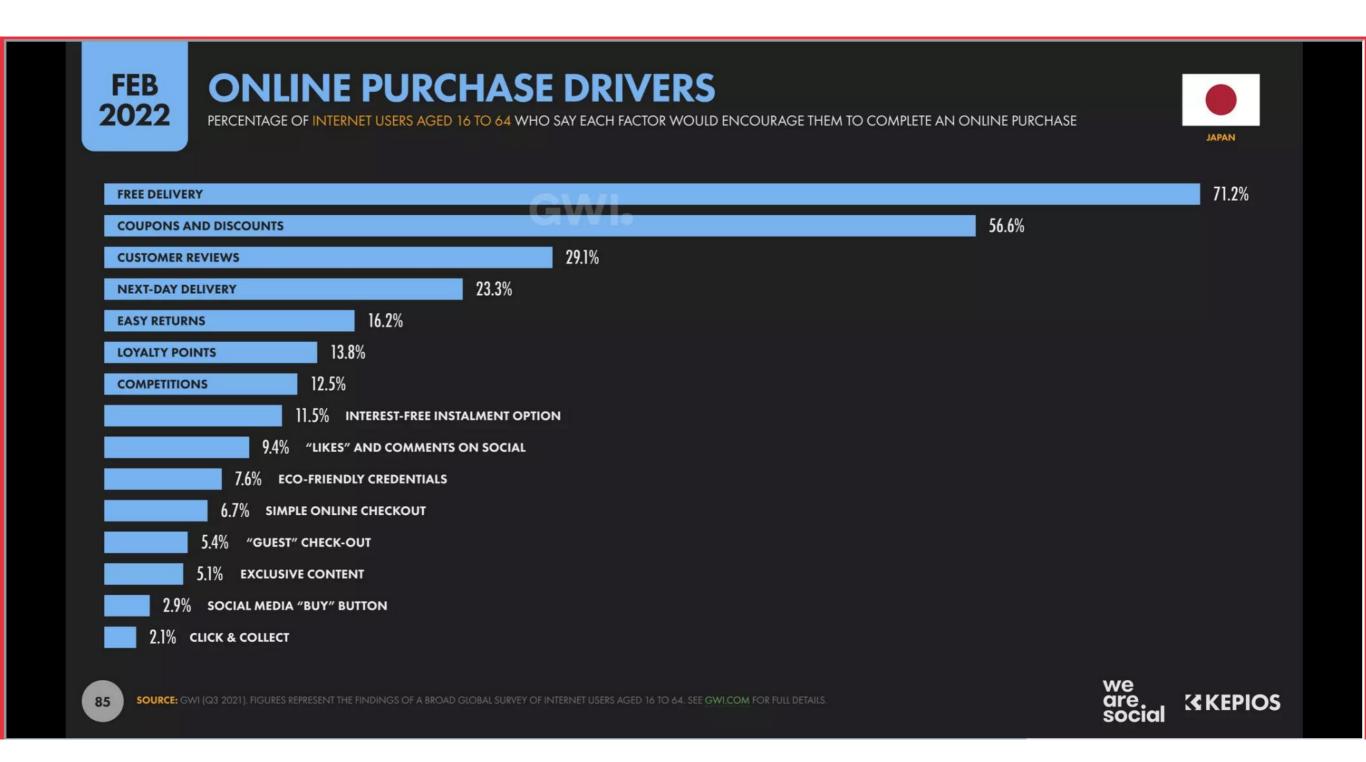
YEAR-ON-YEAR CHANGE +17% (+\$208 MILLION)



SOURCE: STATISTA DIGITAL MARKET OUTLOOK, SEE STATISTA.COM FOR MORE DETAILS. NOTES: FIGURES REPRESENT ESTIMATES FOR FULL-YEAR SPEND IN 2021 IN U.S. DOLLARS, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. INCLUDES CONTENT DOWNLOADS AND SUBSCRIPTIONS TO STREAMING SERVICES AND ONLINE PUBLISHERS, DOES NOT INCLUDE PHYSICAL MEDI OR USER-GENERATED CONTENT. COMPARABILITY: BASE AND CATEGORY DEFINITION CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.



KEPIOS



OFF-SHORE PAYMENTS?

FEB 2022

OVERVIEW OF CONSUMER DIGITAL PAYMENTS

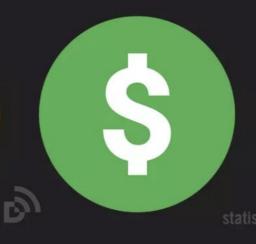
HEADLINES FOR THE ADOPTION AND USE OF DIGITALLY ENABLED PAYMENT SERVICES BY END CONSUMERS



NUMBER OF PEOPLE MAKING DIGITAL PAYMENTS YEAR-ON-YEAR CHANGE IN THE NUMBER OF PEOPLE MAKING DIGITAL PAYMENTS TOTAL ANNUAL VALUE OF DIGITAL PAYMENT TRANSACTIONS (USD) YEAR-ON-YEAR CHANGE IN THE VALUE OF DIGITAL PAYMENT TRANSACTIONS AVERAGE ANNUAL VALUE OF DIGITAL PAYMENTS PER USER (USD)











100.5 MILLION +3.5% +3.4 MILLION \$242.9
BILLION

+22.0% +\$44 BILLION

\$2,417 YOY: +18%

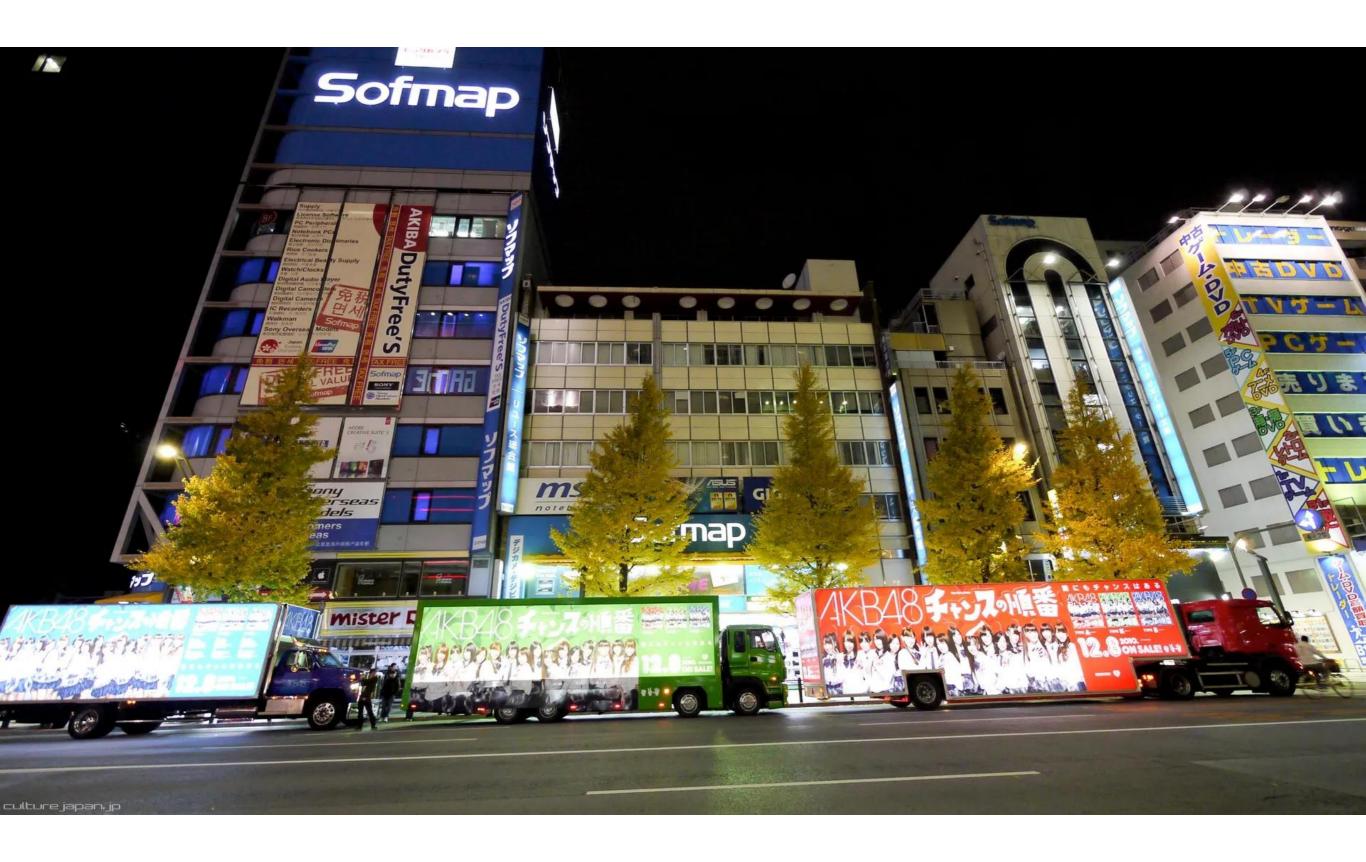
92

SOURCE: STATISTA DIGITAL MARKET OUTLOOK, SEE STATISTA.COM FOR MORE DETAILS. NOTES: "DIGITAL PAYMENTS" INCLUDE MOBILE P.O.S. PAYMENTS (E.G. PAYMENTS VIA APPLE PAY OR SAMSUNG PAY), B2C DIGITAL COMMERCE, AND B2C DIGITAL REMITTANCES. VALUES DO NOT INCLUDE B2B TRANSACTIONS. FIGURES REPRESENT ESTIMATES FOR FULL-YEAR FOR 2021, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. FINANCIAL VALUES ARE IN U.S. DOLLARS. PERCENTAGE CHANGE VALUES ARE RELATIVE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%), "BPS" VALUES REPRESENT BASIS POINTS, AND INDICATE ABSOLUTE CHANGE, COMPARABILITY: BASE CHANGES, FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.



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alamy

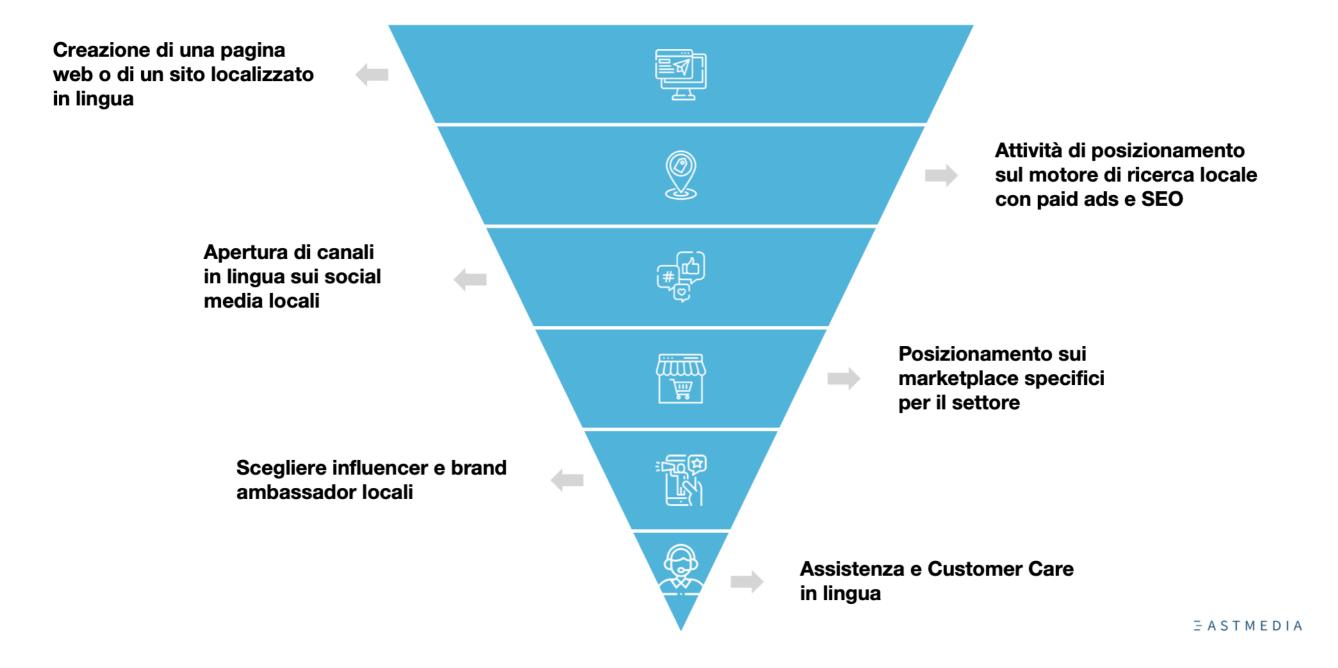
Image ID: 2A8ARD7 www.alamy.com







ESEMPIO DI FUNNEL PER IL GIAPPONE



SENZA DIMENTICARE...

- LOCAL PARTNER/DISTRIBUTOR
- STRATEGIA DI COMUNICAZIONE LOCALE
- TRADUZIONI PROFESSIONALI E LOCAL TEAM
- STRATEGIA CROSS-MEDIALE (DIGITAL / MSM / OIUTDOOR / EVENTI / PR / RETAIL)
- CUSTOMIZZAZIONE PRODOTTO (Taglia/Fit, Limted edition, colori etc etc)
- TRY ON e PUNTIO VENDITA

