

Asia Pacific

Japan

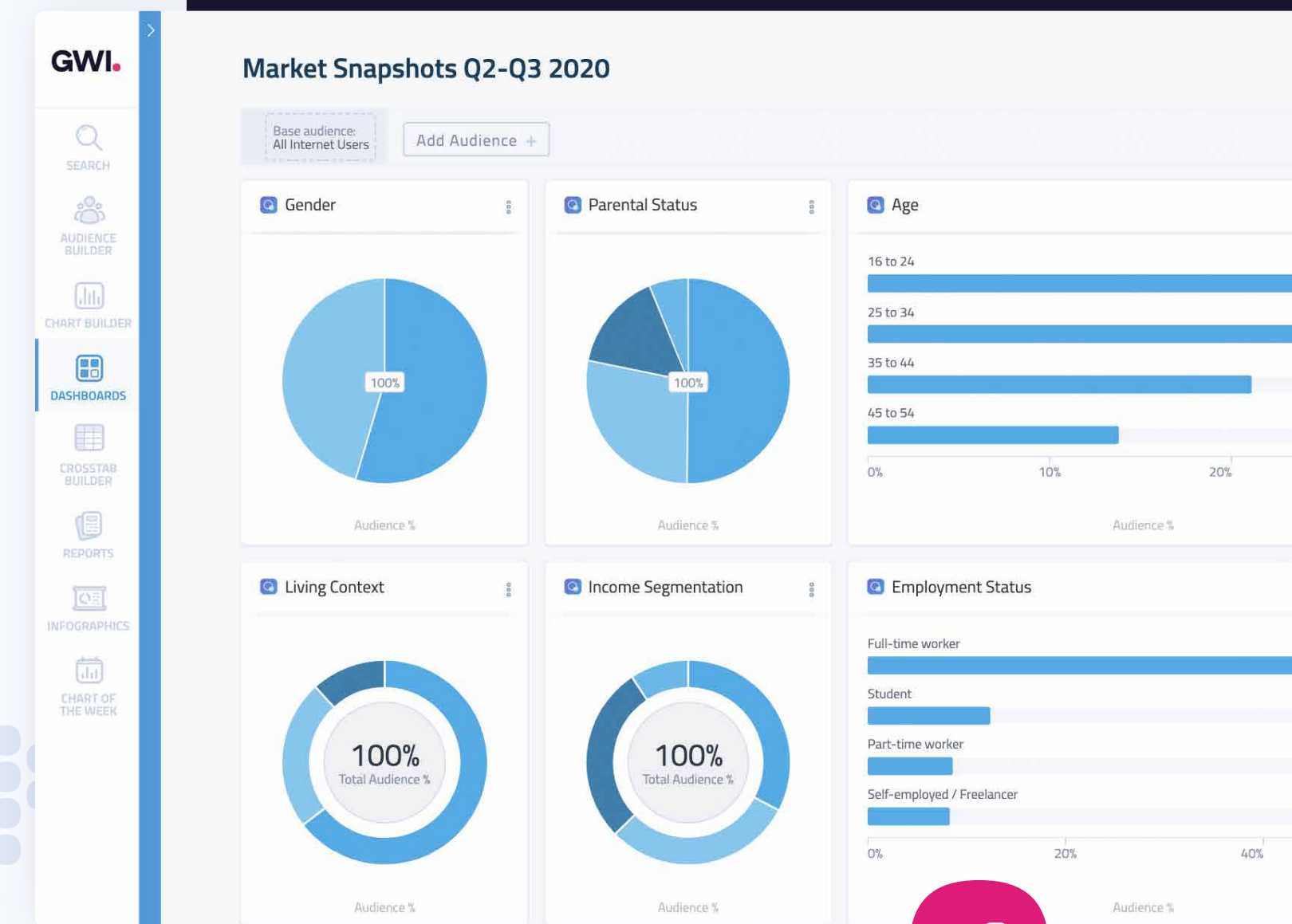
Key digital behaviors and trends over time and across demographics



Sample
Q2-Q3 2020
6,637

Internet
Penetration*
93%

*GWI's forecasts for 2020 based on 2018 ITU data



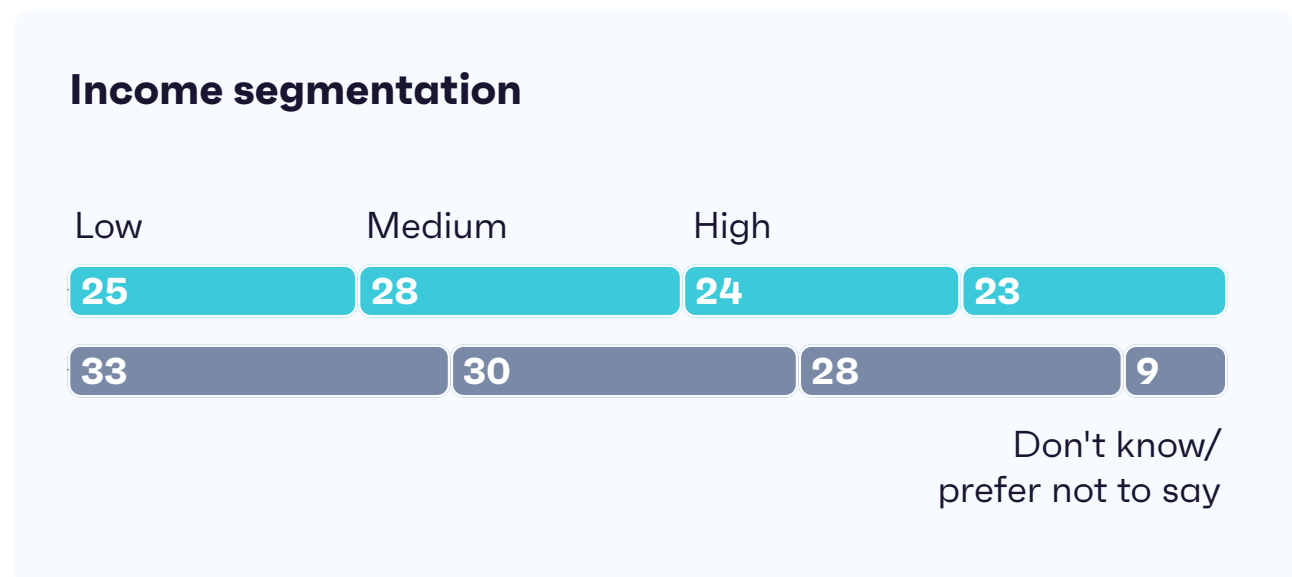
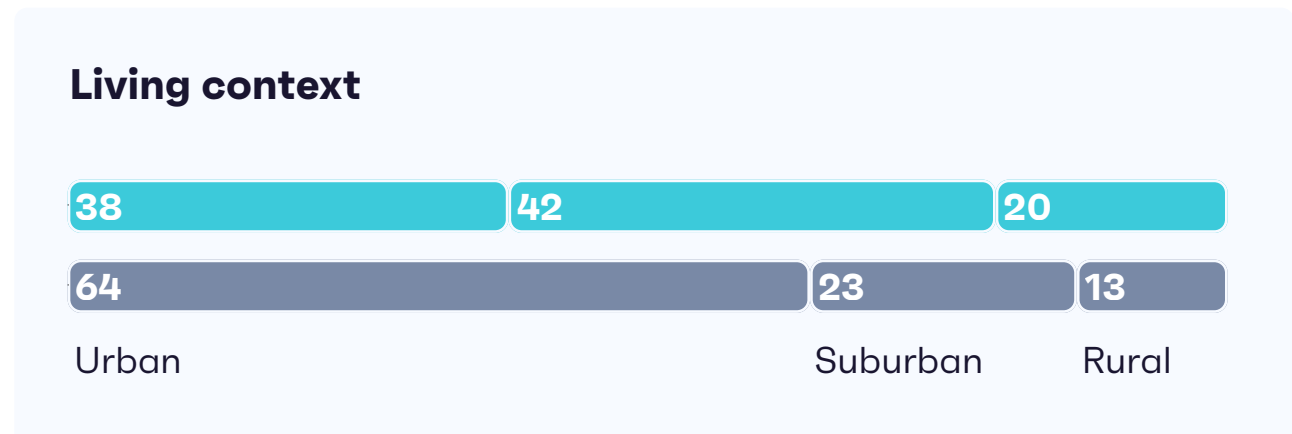
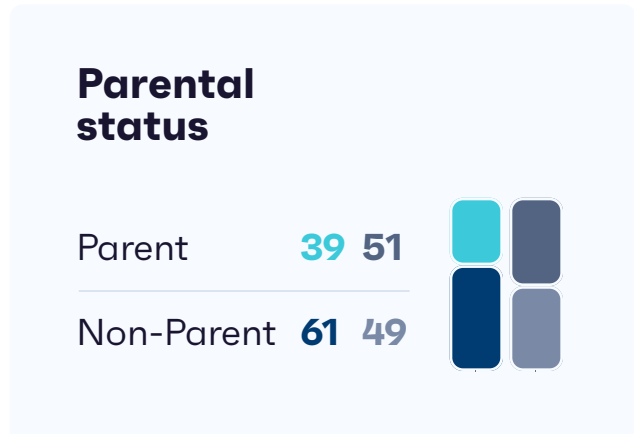
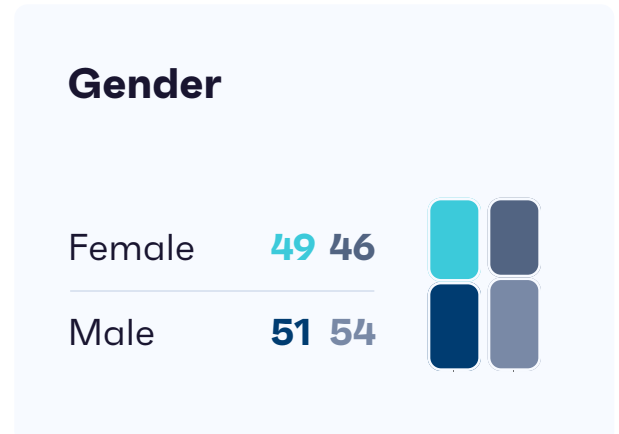
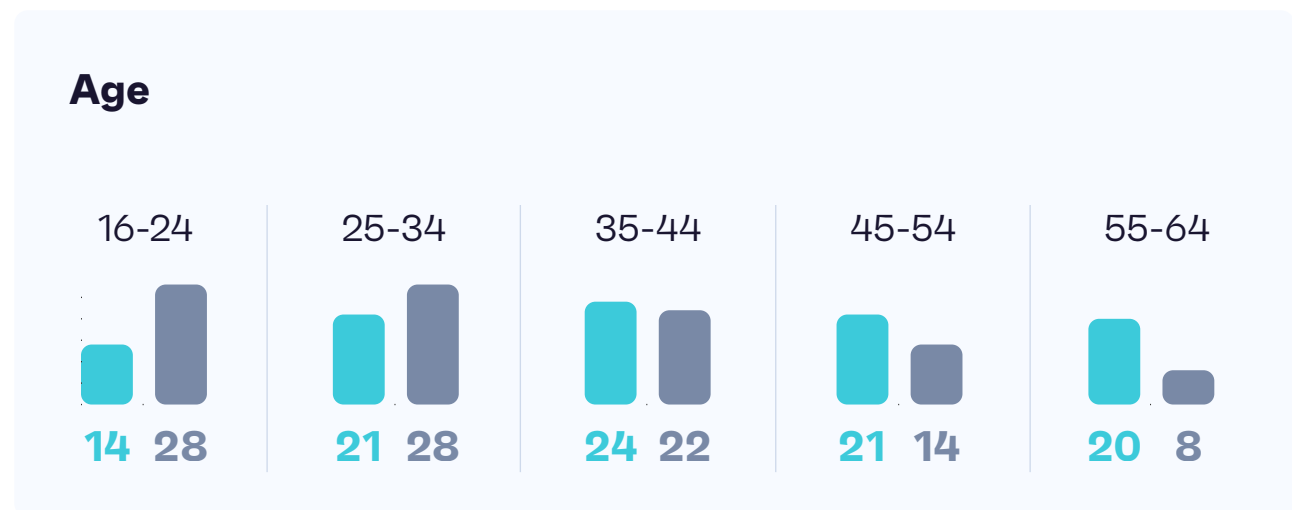
We've collected all charts in this report in an **interactive dashboard on our Platform**, where you can investigate the data by demographics, over time, and among custom audiences.

GWI.



Who are they?

● Japan %
● Global average %



Self-perceptions

I am prone to anxiety	40	26
I believe all people should have equal rights	33	58
I like to know what is going on in the world	32	50
I am interested in other cultures/countries	30	47
I always try to recycle	22	38

Character

Price-conscious	40	42
Health-conscious	31	48
Open-minded	26	55
Creative	18	46
Social/outgoing	17	41

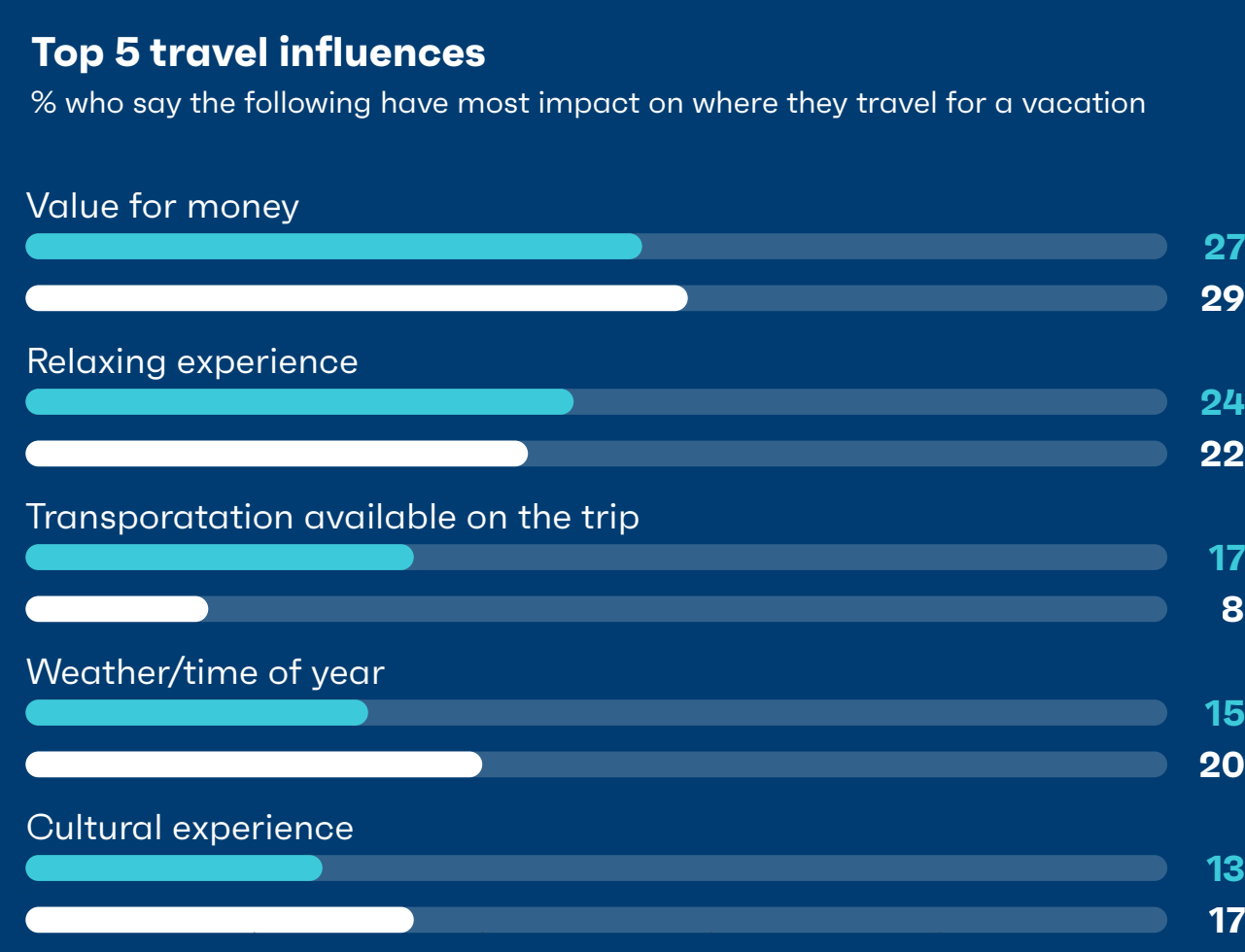
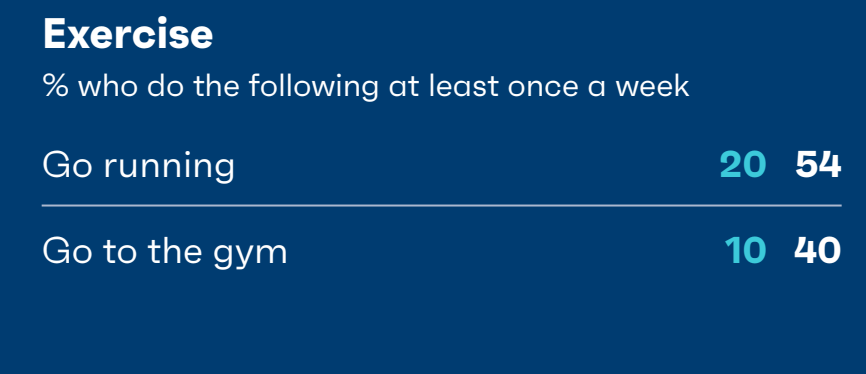
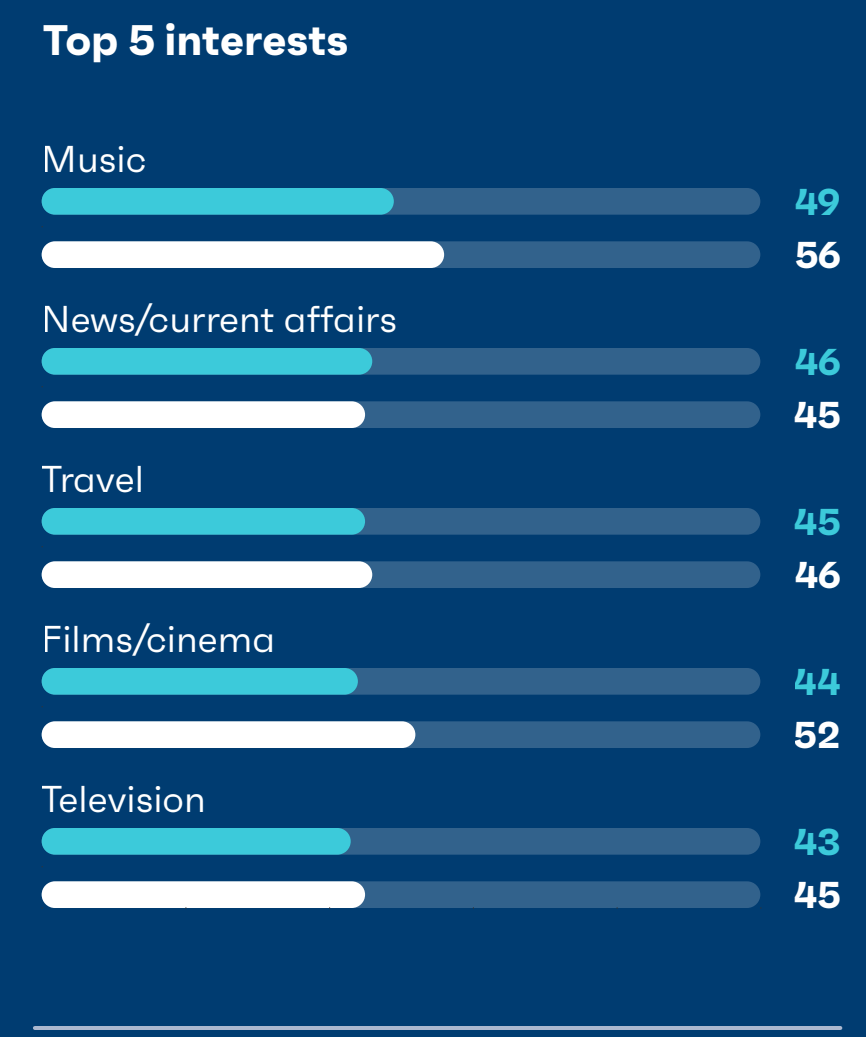
Employment status

Full-time worker	44	52
Part-time worker	15	8
Self-employed/freelancer	9	10
Full-time/stay-at-home parent	5	3
Student	9	15
Unemployed	6	7
Retired	4	3
Other	8	2



What's their lifestyle?

● Japan %
● Global average %





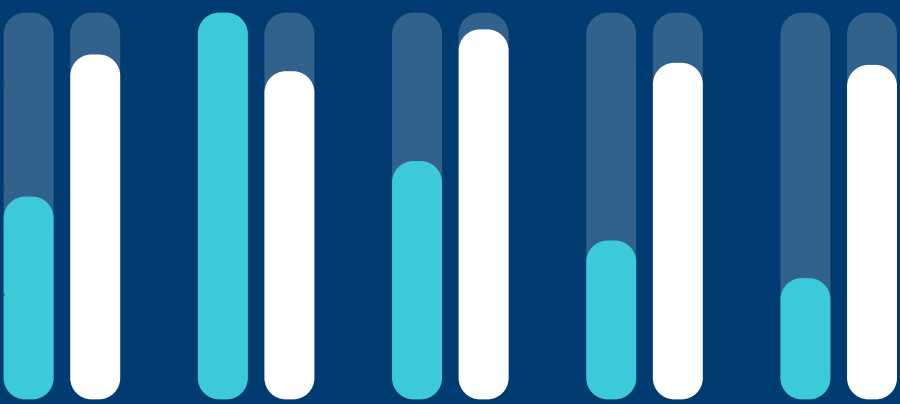
Time spent online



Average h:mm per day typically spent online on the following devices

Mobile PC/Laptop

1:37 2:45 3:05 2:37 1:54 2:57 1:16 2:41 0:58 2:40



All Gen Z 16-23 Millennials 24-37 Gen X 38-56 Boomers 57-64



How do they use technology and electronics?

Japan % Global average %

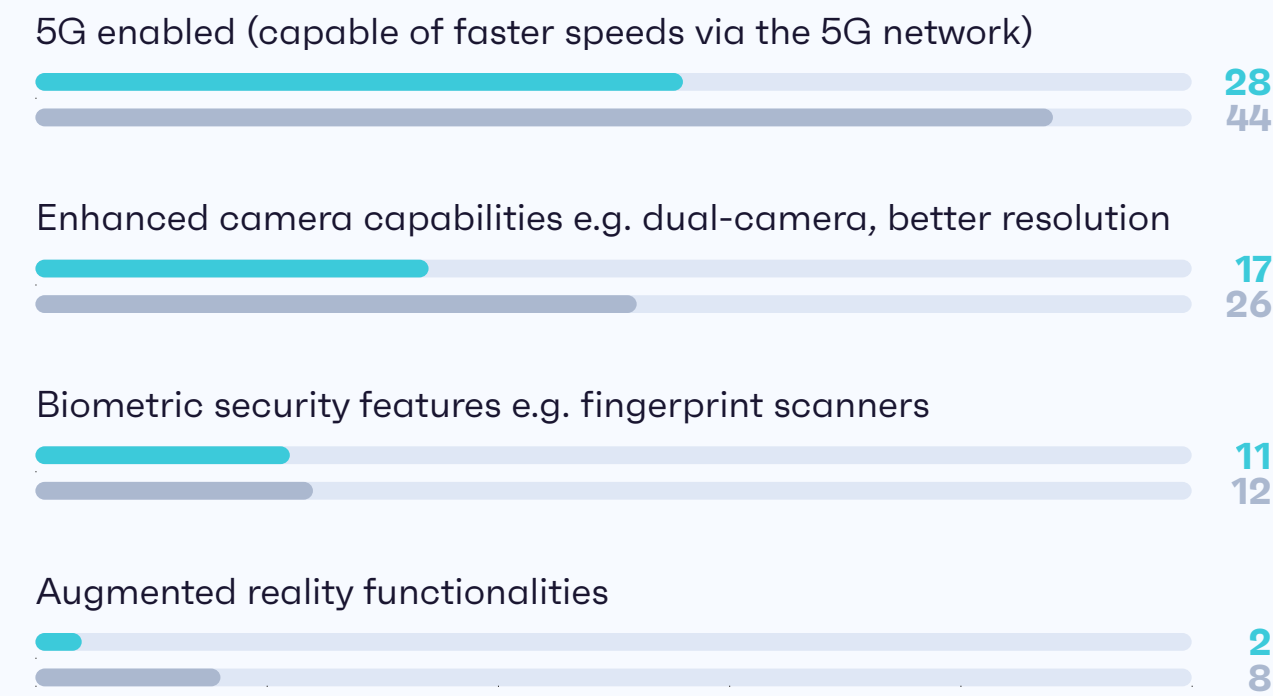
Attitudes to technology

% who feel the following describe them

I worry about how companies use my personal data online	31	33
I worry I spend too much time on my smartphone	26	31
I am comfortable with my apps tracking my activity	18	25
I follow the latest technology trends and news	12	38
I am confident using new technology	11	43

Desired mobile features

% of mobile upgraders who say they're looking for the following features when purchasing their next phone



Plan to buy a new phone or upgrade in the next 12 months 32% 57%

Top 5 handset brands for next purchase

% who say they would buy the following brands when they next upgrade or buy a new phone. Global figures in this chart exclude China

1.	iPhone	Apple	44	41
2.	Sony	SONY	19	6
3.	Sharp	SHARP	14	1
4.	Fujitsu	FUJITSU	6	-
5.	Samsung	SAMSUNG	6	52

Top 5 mobile actions

% who say they have done the following mobile actions in the last month

1.	Used/scanned a QR code	48	39
2.	Used a mobile payment service such as Apple Pay	24	30
3.	Made a video call or used FaceTime	17	47
4.	Tracked your spending	12	33
5.	Used an image recognition tool (e.g. Google Lens)	10	33



Smart home product ownership

% of smart home product owners who say they own the following

	Japan	Global
Smart speaker (e.g. Apple HomePod)	82%	65%
Smart utility product (e.g. remotely controlled thermostat)	28%	44%
Smart security product (e.g. remotely controlled doorbell)	19%	40%

Top 5 electronics

Purchased in the last 3-6 months Planning to purchase

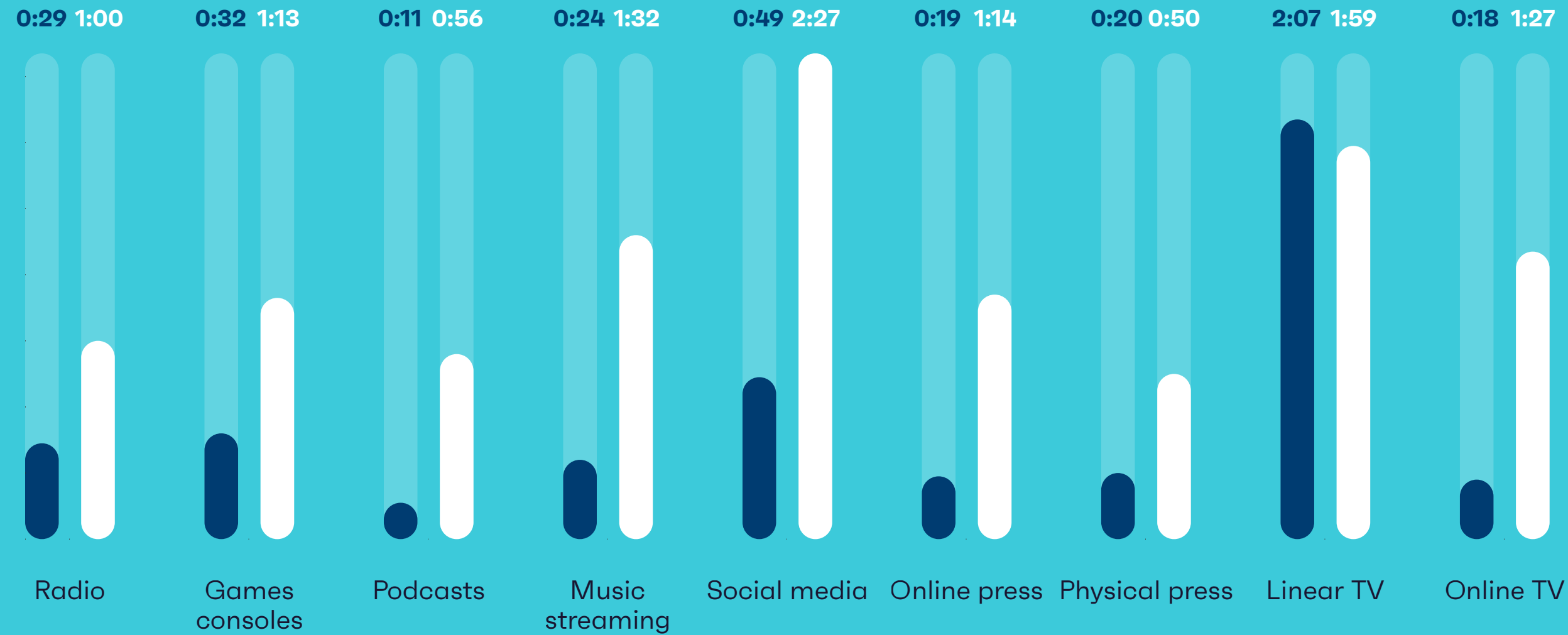
1.	Headphones/earphones	16	9
2.	Laptop	14	12
3.	Computer/video games	9	6
4.	Games console	8	8
5.	Desktop PC	7	7



Daily media time

Average time spent per day on the following types of media in h:mm

● Japan ● Global



What media do they consume?

● Japan % ● Global average %

TV behaviors

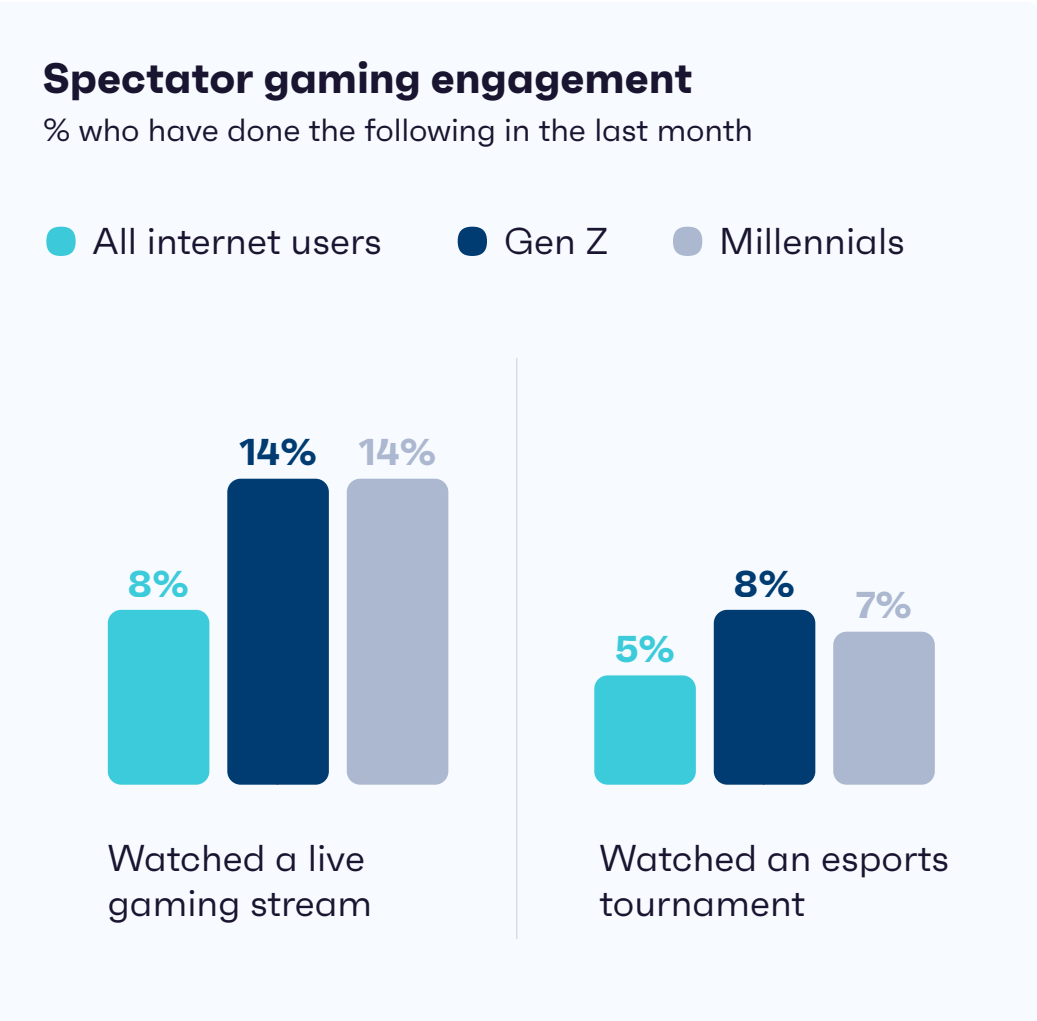
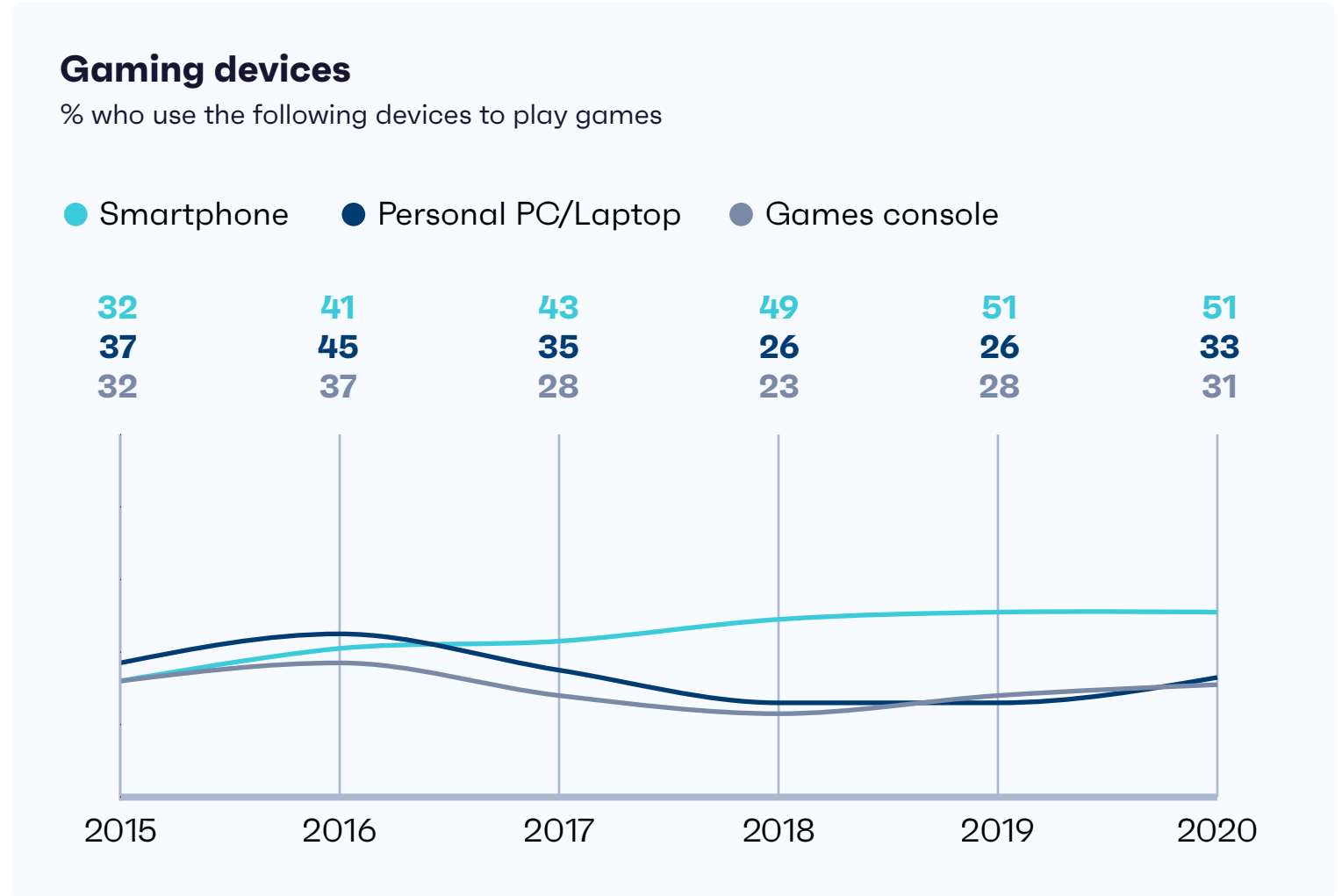
% who do the following at least once a week

Watch any type of TV	93	93
Watch live television on a TV channel	87	80
Watch shows that you have recorded from TV	61	48
Watch subscription services such as Netflix	28	62
Watch a TV channel's on-demand service	24	54

Top 5 streaming services

% who have used the following in the last month

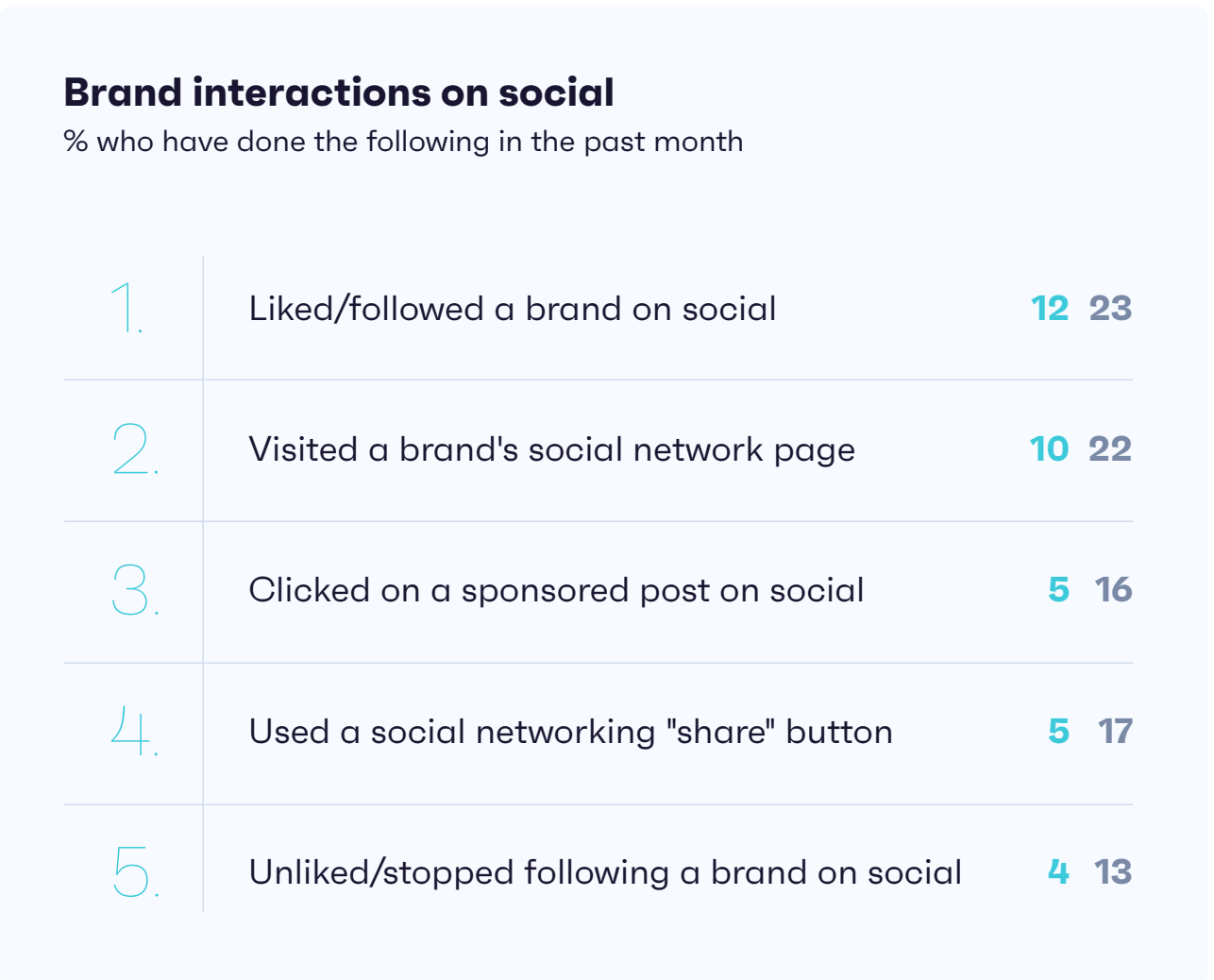
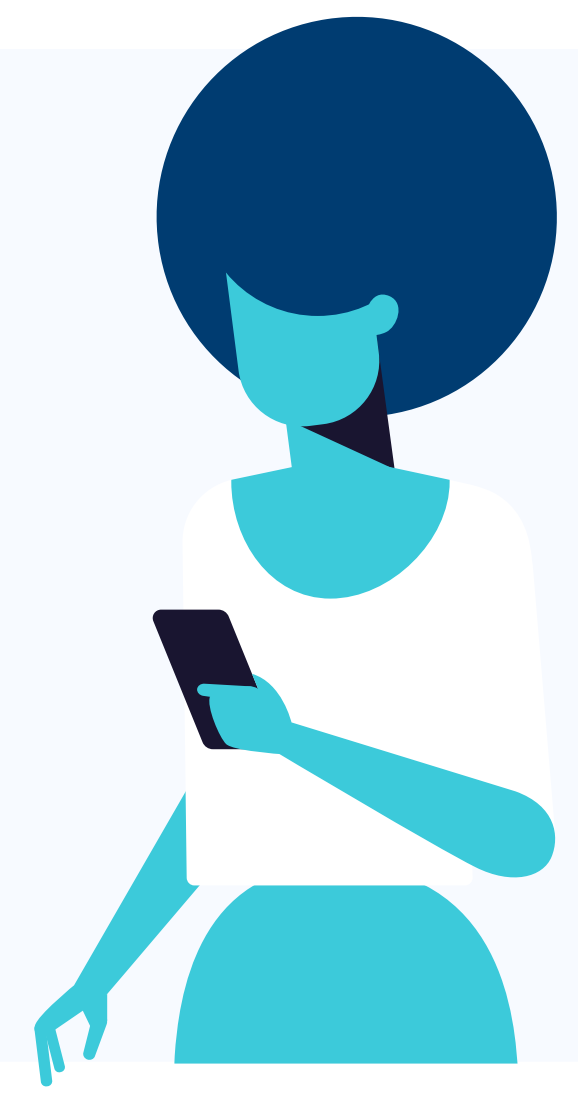
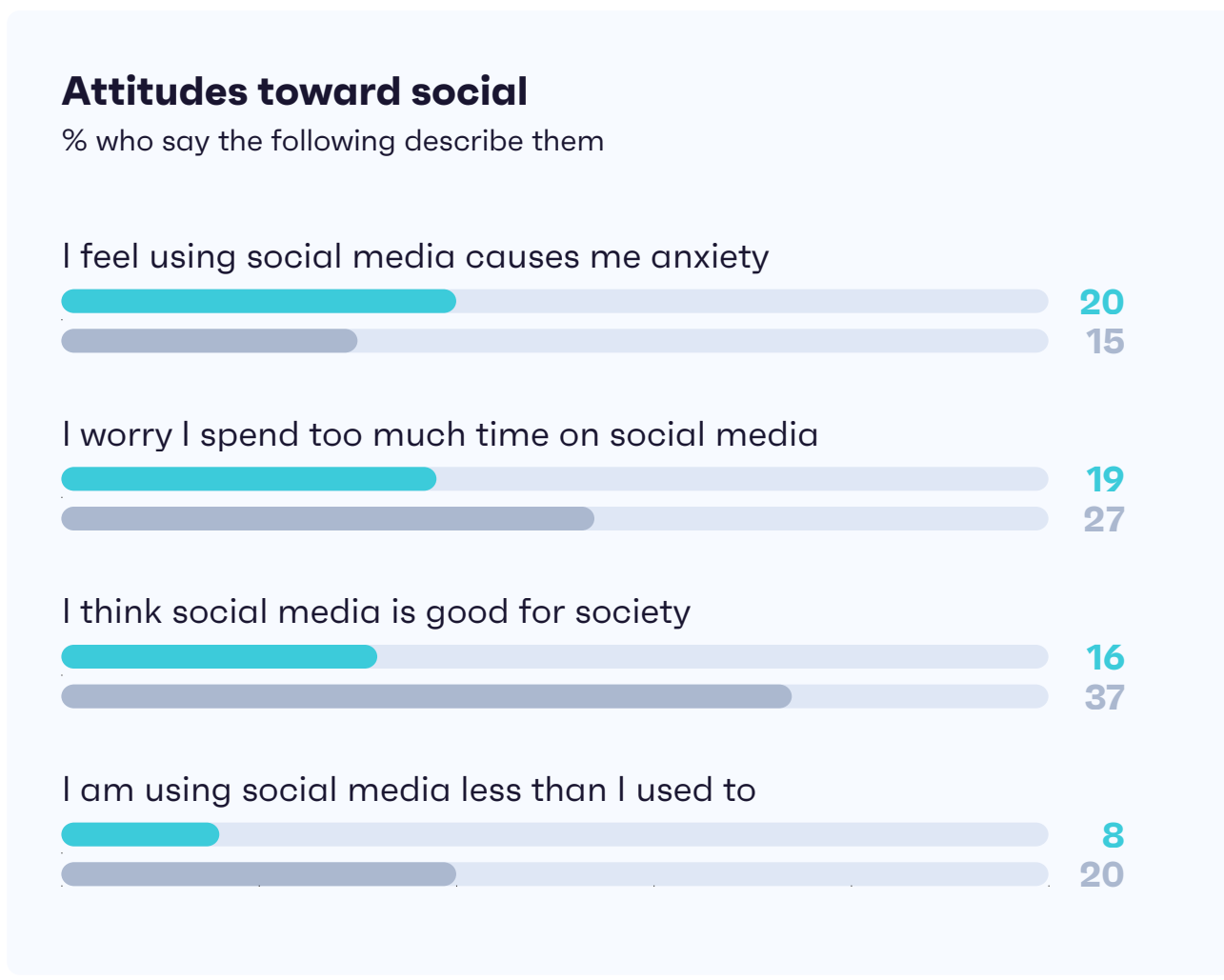
1.	Amazon Prime Video	prime video	27	20
2.	Abema TV (Japan only)	AbemaTV	16	1
3.	Netflix	NETFLIX	12	42
4.	Hulu (Japan/U.S.A. Only)	hulu	9	4
5.	YouTube Premium	YouTube Premium	8	20





How do they use social media?

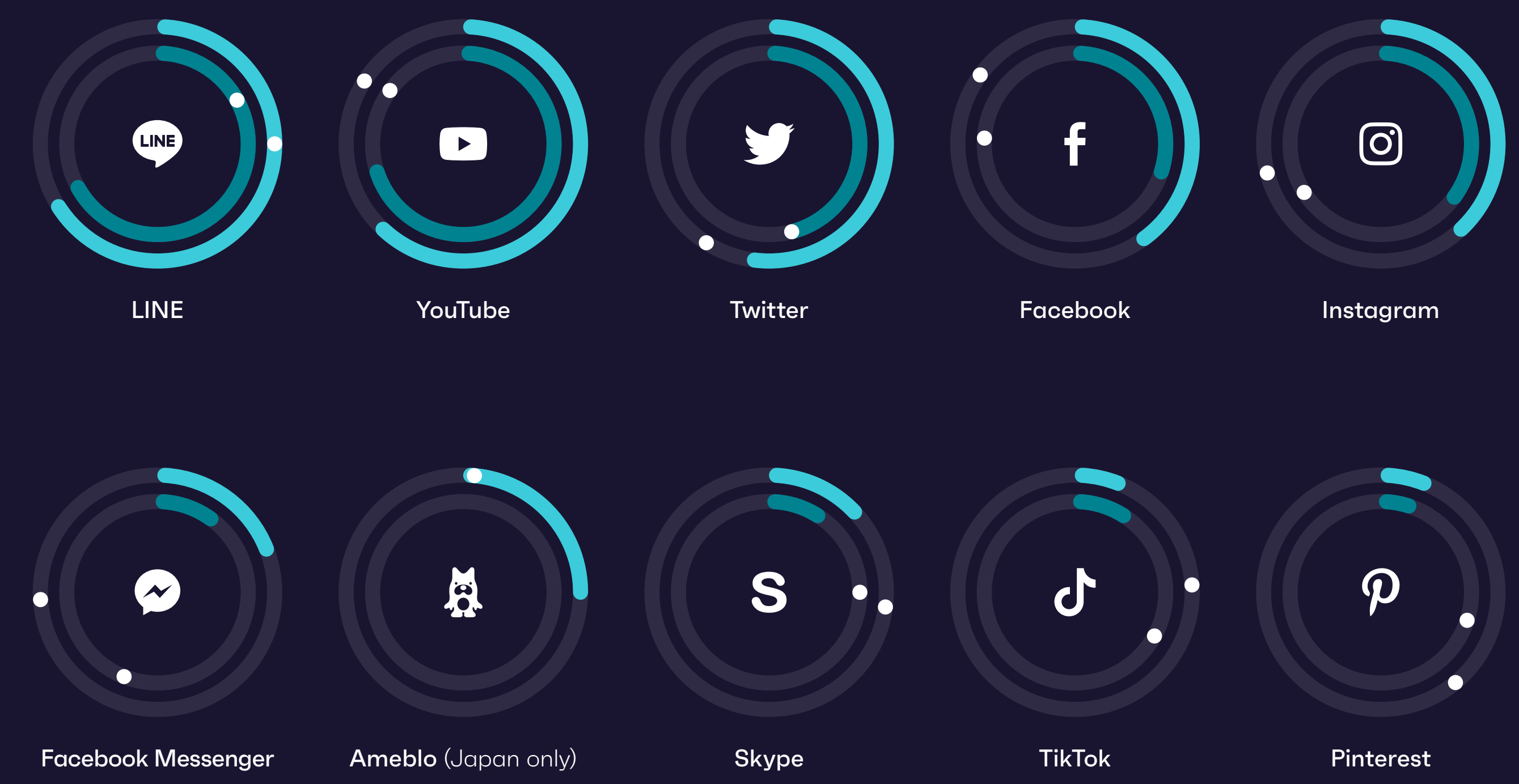
● Japan %
● Global average %



Top 10 social platforms in Japan



● Members
● Visitors/users
● Global average



Members People who say they have an account on the platform in question.
Visitors/users People who say that, within the last month, they have visited or used a social network's website or app via any device.

Note that global figures in this chart exclude China.



How do they make purchases?

● Japan %
● Global average %



Purchase journey



Brand/product discovery

% who discover brands/products via the following

Search engines	42	34
Ads seen on TV	34	33
TV shows/films	29	24



Online brand/product research

% who use the following for more information about a brand/product

Search engines	60	53
Price comparison websites	37	30
Product/brand sites	35	36



Online purchase drivers

% who are most likely to buy a product online due to the following

Free delivery	69	53
Coupons and discounts	53	41
Reviews from other customers	29	35



Brand advocacy

% who are motivated to advocate a brand online by the following

Rewards	48	41
Relevant to my own interests	44	32
Love for the brand	29	35



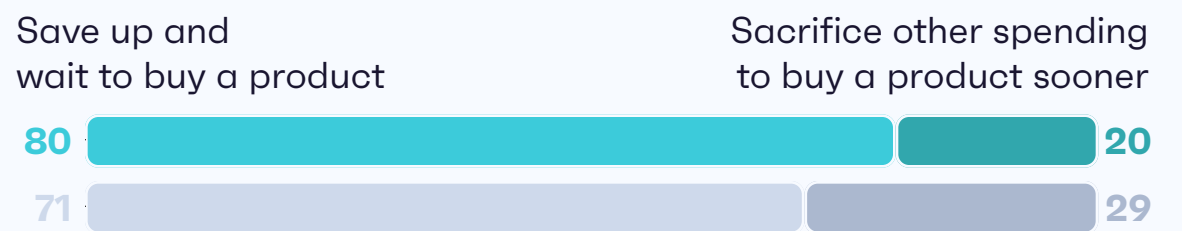
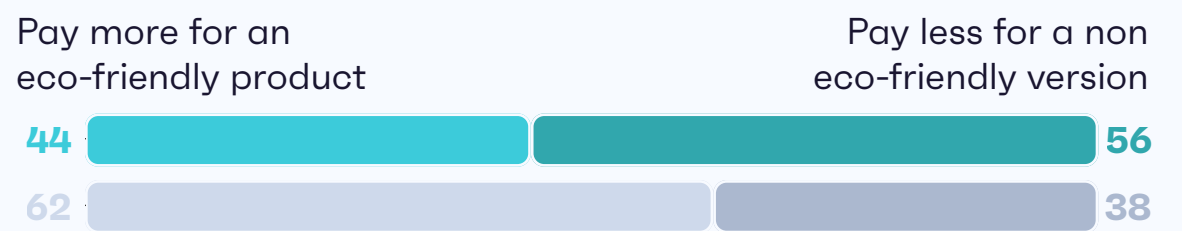
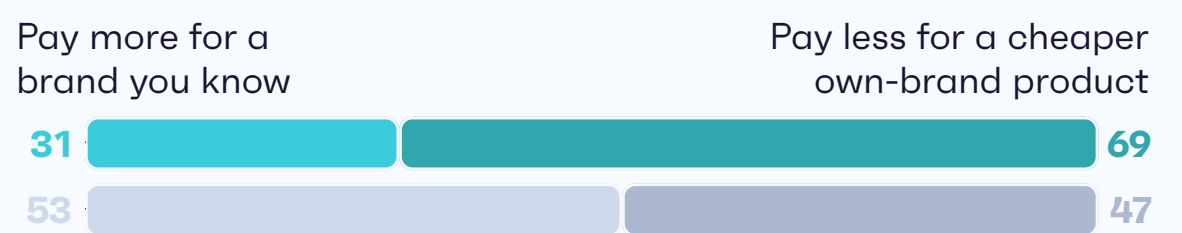
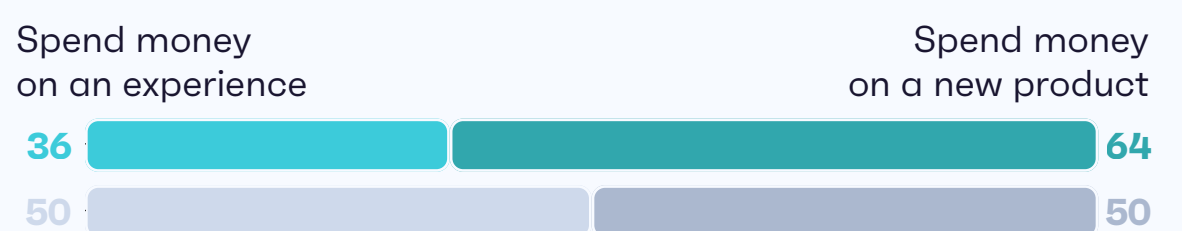
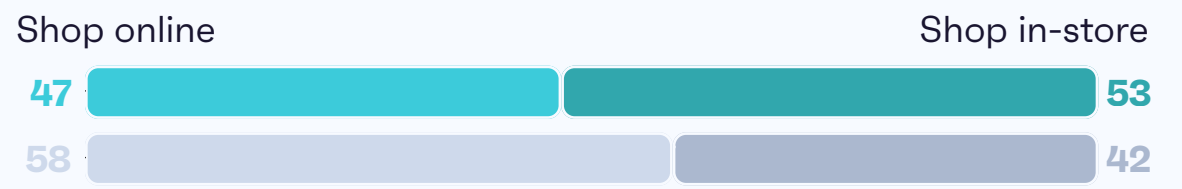
Brand qualities

% who say they want brands to be the following

● Japan	● Global average
Reliable	51% 58%
Authentic	44% 46%
Smart	28% 45%

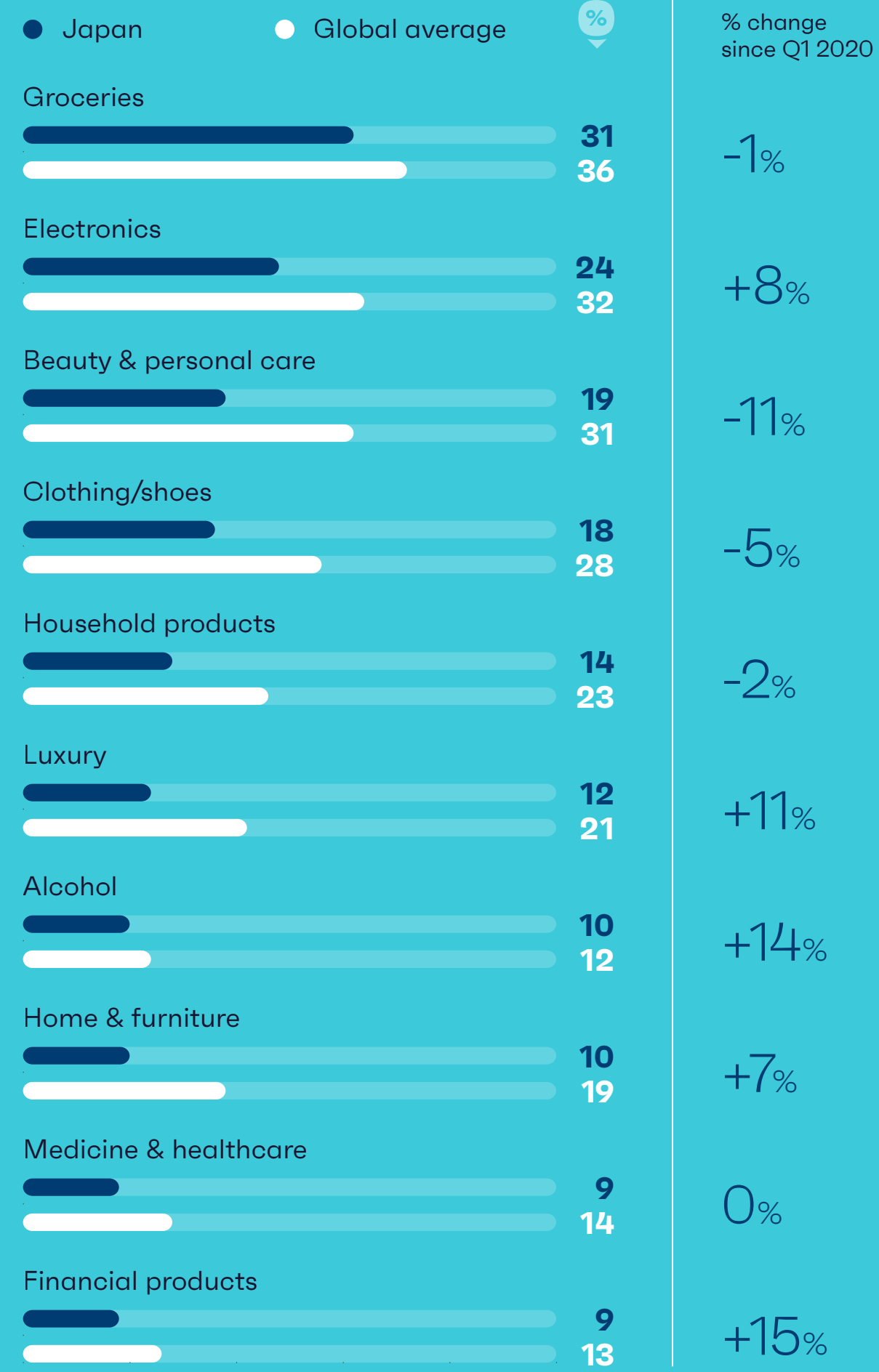
Purchase preferences

% who say they'd rather do the following



Online purchases

% who have purchased the following products online





How do they feel about COVID-19?

● Japan %
● All 8 countries %

Stats related to COVID-19 are from GWI Coronavirus and GWI Zeitgeist recontact surveys across eight markets – **U.S., UK, Brazil, Japan, Italy, Germany, China, and India.** This data is among internet users aged 16-64 in Japan compared to the eight countries that featured in all waves.

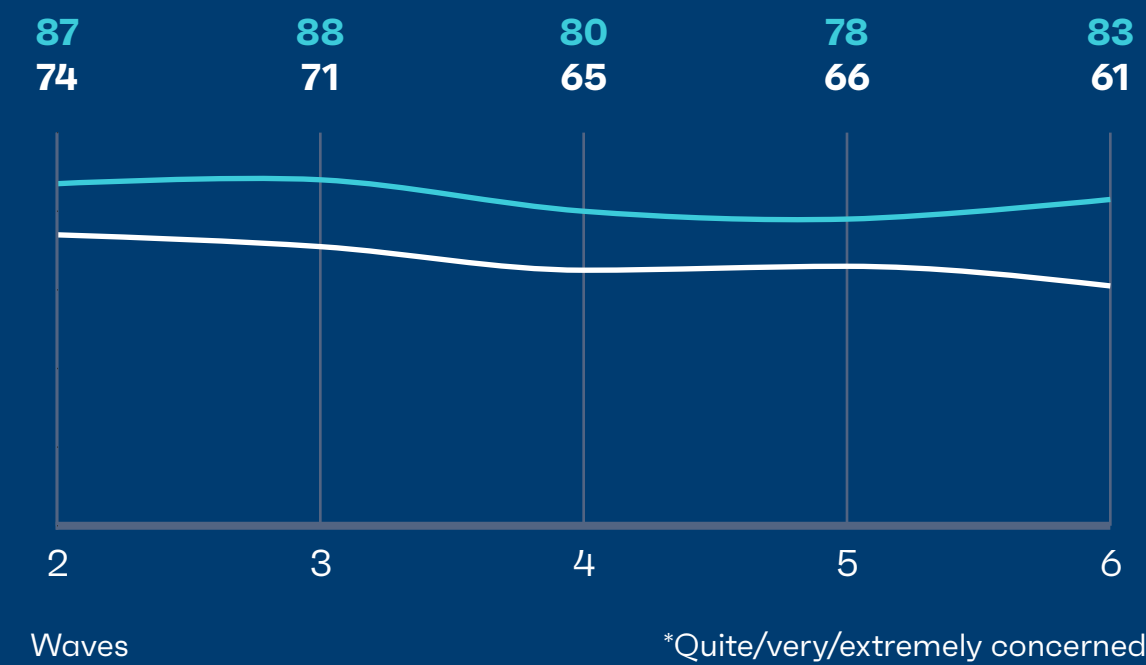


Wave	Fieldwork dates	Respondents
2	March 31-April 3	8,135
3	April 21-23	8,247
4	May 19-26	8,413
5	June 29-July 2	8,380
6	Dec 4-17	8,634

Levels of concern

% who say they are concerned* about the COVID-19 situation in their country

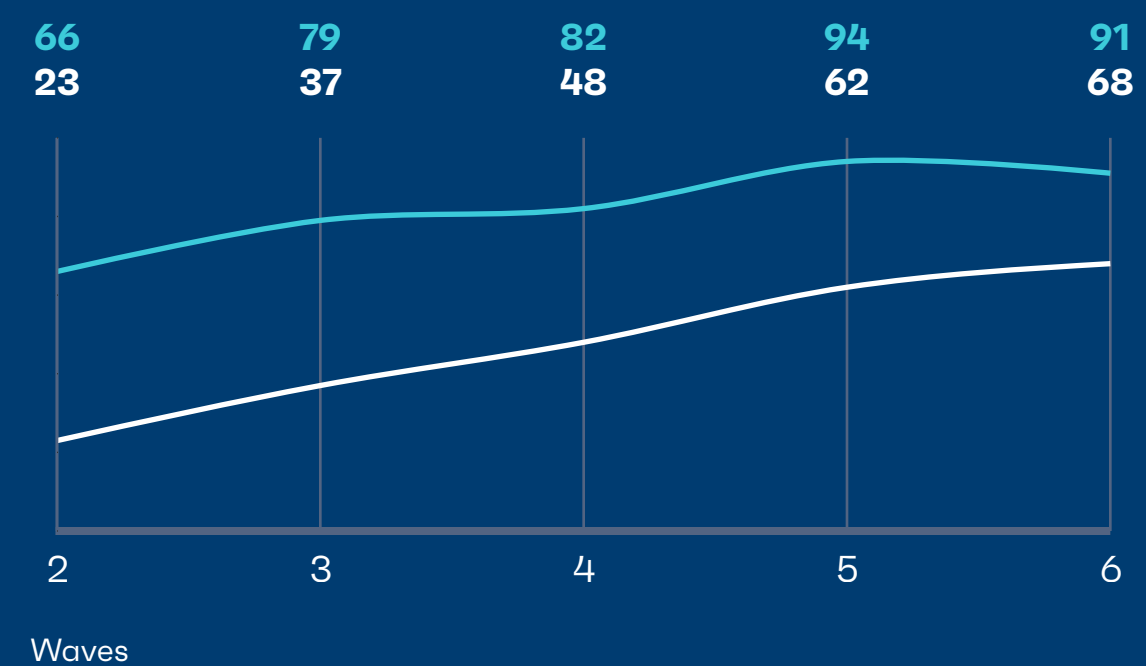
● Japan ● 8 Countries



Expected length of outbreak

% who think the outbreak will last 6 months or longer in their own country

● Japan ● 8 Countries



Levels of optimism

% who say they are optimistic their country will overcome the outbreak

● Japan ● 8 Countries



Top 5 actions to encourage indoor dining

% who say the following would make them more comfortable dining indoors

1.	Social distancing of tables/parties	59 65
2.	Limiting number of people in restaurant/bar	53 56
3.	Air filtration systems	53 41
4.	Mandatory mask wearing when not seated	51 45
5.	Temperature checks	43 52

Top 5 actions to encourage in-store shopping

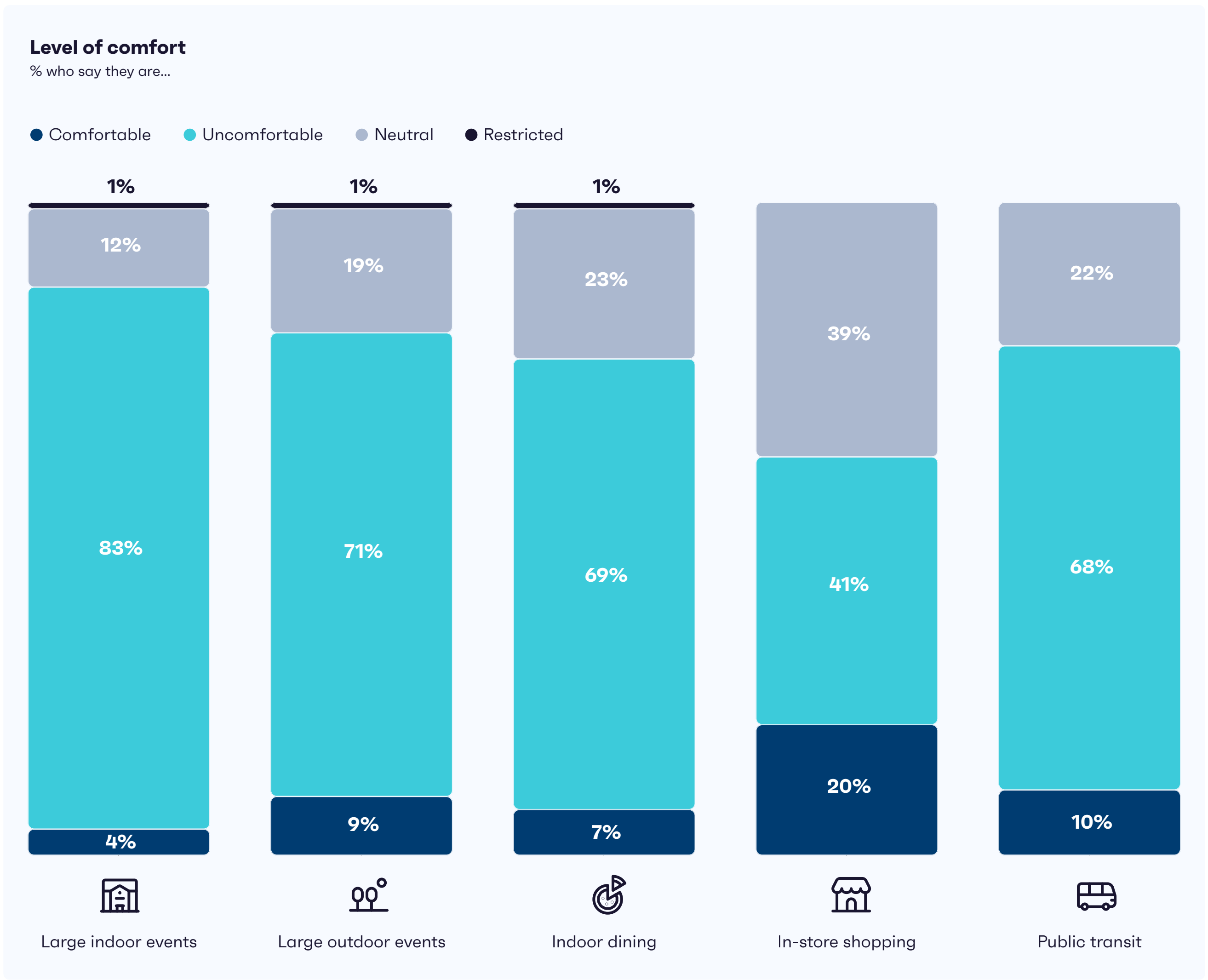
% who say the following would make them more comfortable shopping in-store

1.	Mandatory mask wearing	69 64
2.	Social distancing in-store	62 63
3.	Air filtration systems	53 42
4.	Limiting number of people in the store	48 54
5.	Temperature checks	34 50





How do they feel about COVID-19?



Vaccine attitudes

% who say the following about their plans on getting a vaccine

● Japan ● Gen Z & Millennials (aged 16-37) ● Gen X & Boomers (aged 38-64)



Top 5 vaccine motivators

% who say the following would encourage them to take a COVID-19 vaccine

● Japan ● All 8 countries



Methodology

Purchase category definitions:

Alcohol

Beer, Champagne/sparkling wine, Cider, Pre-mixed/ready-to-drink cocktails, Spirits, Wine (any), Wine (red), Wine (white)

Beauty & personal care

Conditioner, Deodorant, Exfoliating products, Grooming & shaving products, Hair coloring products, Hair styling products, Hair styling tools, Make-up/cosmetics, Moisturizer, Shampoo, Skincare products

Clothing/shoes

Clothing, Shoes, Sports clothing/equipment

Electronics

2-in-1 laptop/tablet, Broadband/fiber optic, Computer/video games, Desktop PC, Digital camera, Flat-screen TV, Games console, Headphones/earphones, Laptop, Smart home assistant, Smart wearable device, Tablet

Financial products

Car/automotive insurance, Foreign currency, Health insurance, Home contents insurance, Home-owners/building insurance, Life insurance, Mortgage, Pet insurance, Travel insurance

Groceries

Bottled water, Breakfast cereal, Candy, CBD-infused products

(U.S.A. and Canada only), Cheese, Chewing gum, Chocolate, Coffee, Cookies, Fresh ready meals, Frozen food/ready meals, Health foods, Ice cream, Organic fruit/vegetables, Potato chips/crisps, Snack foods, Soft drinks, Tea, Vitamins/supplements

Home & furniture

Air conditioning unit, Bed, Dishwasher, Garden furniture, Home exercise equipment, Household furniture, Housing/property, Iron, Microwave, Refrigerator, Sofa, Vacuum cleaner, Washing machine/tumble dryer

Household products

Air freshener/deodorizer, Cleaning products, Dishwasher tablets, Fabric conditioner, Laundry detergent/washing powder, Pet food (dry) for cats/dogs, Pet food (wet) for cats/dogs, Pet food for other animals

Luxury

Glasses/spectacles, Handbag/bag, Jewelry, Purse/wallet, Wristwatch

Medicine & healthcare

Cough/cold/flu medicine, First-aid items, Headache/migraine medicine, Heart medication, Medicines/pharmaceutical items, Mouth/oral care treatment, Pain relief medicine, Skin problem treatment

Unless otherwise stated, all figures in this report are drawn from GWI's online research among internet users aged 16-64. Please note that we only interview respondents aged 16-64 and our figures are representative of the online populations of each market, not its total population.

For an in-depth explanation of GWI's research and methodology, including information on our country coverage, internet penetration rates, our sample structures, and much more, please [click here](#).