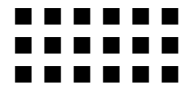


# **2004 Hit Products in Japan**

## **Hit Products for 2004, and Consumer Trends in 2005**



### **The Key Phrase for 2004 Was**

**“A New Psychology — Transformation of the Essence Captured the Consumer Mind”**

The year 2004 was a pivotal year in which the Japanese economy finally turned onto the road to recovery after standing nearly still for over a decade. “The Dentsu Studies of Consumer Sentiment” and other indicators suggest that consumers sensed a change for the better in 2004. The major issues confronting Japanese society (including the needs to preserve the global environment and to deal with Japan’s declining birthrate) remain as pressing as ever, of course. But consumers do seem to feel, whether due to media influence or based on personal experience, that prospects for a brighter future are beginning to illuminate the darkness that has enclosed them for so long.

This positive shift in consumer sentiment is reflected in the results of our survey of this year’s hit product trends. Far from superficial, the changes from the previous year are essential in nature. As the economy has improved, consumers have begun demanding products and services that stir their deepest emotions. They are seeking things with true, rather than superficial, elegance. They are discovering the appeal of things that are firmly rooted in Asian culture and history. They are searching for lifestyles that promote true health and environmental preservation. This pursuit of deep-seated, essential values may be seen as a result of serious soul searching, or as an attempt to break away from the misguided, superficial values that enthralled consumers during Japan’s economic bubble.

With these consumer sentiments in mind, we have summarized the overall trend in hit products and key phrases for 2004 as “A New Psychology — Transformation of the Essence Captured the Consumer Mind.” Changes in the attitudes of individual consumers are contributing to a transformation of the national character. The emergence of a desire among consumers to satisfy pent-up demand springing from the depths of their essential psyches suggests that the current Japanese recovery is more than a temporary phenomenon. It is with this hope that we present this report.

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## **Part I 2004 Hit Products in Japan**

### **New directions for old products**

As technological advances were leading to the development of new applications for IT in 2004, many new products employing innovation to give conventional functions new depth were also appearing on the market. One striking characteristic of 2004 was the birth of products conceived ingeniously from a novel perspective. It became apparent that even products that had matured and peaked in the market could achieve new breakthroughs based on a careful reexamination of their fundamentals, or on the application of new ideas from different angles. This trend can be expected to continue in the coming years.

#### **Packet fixed-rate communications fees for mobile phones**

This fee system permits mobile phone users to employ data communications services to their hearts' content for a fixed monthly fee. Users can access contents such as music, movies and games without worrying about high telecommunications fees. The introduction of fixed-rate fee systems is helping to stimulate the diffusion of third-generation mobile phone services that can transmit and receive large volumes of data.

#### **“Matsuken samba”**

This samba-style song and dance performance was popularized by the actor Ken Matsudaira, whose traditional *chon-mage* samurai hairstyle and gaudy kimono with gold lamé caused a sensation. A long-running hit CD he released in July 2004 is still on the Oricon charts after starting out at number 17. He followed up in December 2004 with a DVD featuring instructions of his dance choreography in four languages.

#### **Electronic money**

Credit cards and mobile phones featuring electronic money systems appeared on the market in rapid succession. With the number of convenience stores and restaurants accepting electronic money increasing as well, consumers are gradually becoming accustomed to this new payment method. Some types of electronic money can even be used for Internet shopping.

### **Mobile phones with electronic money functions**

Mobile phones equipped with non-contact IC chips hit the market in the summer of 2004. The phones can be used to make electronic money payments as well as to serve as train passes, point cards and membership ID cards, among other functions. With the number of stores accepting electronic money expected to increase in 2005 and beyond, mobile phones are likely to be used to make payments increasingly in the years to come.

### **Internet stock trading**

Internet trading in stocks, bonds and investment trusts has entered the mainstream. The convenience of trading over the Internet is attracting consumers with the ability it affords to confirm price movements in real time and place buy or sell orders immediately. The Japan Securities Dealers Association reports that 25.3% of all stock trading and 11.3% of all trading in investment trusts was completed over the Internet between April and September 2004. These percentages have risen steadily over the past several years.

### **Designer mobile phones**

Stylish mobile phones with inspired designs have emerged as hot products. Some fit in the palm of your hand, others are shaped like tiles and still others blend traditional Japanese and modern styling. Some designs have proved so popular that demand has outstripped supply.

### **QR codes**

QR codes are square-shaped bar codes employing a mosaic pattern. Owners of mobile phones equipped with digital cameras that can read QR codes can access a website or record its address simply by taking a photo of its code, with no need to key in the URL. The codes are also employed to simplify airline boarding procedures and to settle Internet shopping accounts.

### **Non-contact IC cards**

Equipped with non-contact IC chips capable of storing large volumes of data and featuring excellent security functions, these cards can be used to settle accounts or verify identities. Non-contact IC chips are finding increasing applications in credit cards, point cards and employee ID cards.

### **New-category alcoholic beverages**

These new types of alcoholic beverages resemble beer but are made from a variety of green bean (*endomame*) or barley shochu (*mugi-shochu*). Their most attractive feature is their price. Because they are subject to a relatively low tax rate, a 350 ml can sells for about 125 yen, or less than low-malt beer (*happo-shu*). All the major breweries marketed versions of these new beverages, creating hit products that together sold a total of eight million cases in the first five months after their introduction.

### **Advanced-function clothes washer/dryers**

Combination clothes washer/dryers with advanced functions and improved convenience recorded excellent sales. Drum-type machines designed for easy laundry removal and machines with corrugated tub bottoms for more effective cleaning proved particularly popular. Consumers also appreciated the machines' reduced water consumption and environmental friendliness.

### **Coffee in small bottles**

This year saw the introduction of coffee products in small, 190 ml reclosable bottles that consumers can carry with them easily, even after opening them. Since the containers are more substantial than PET bottles and the sterilization efficiency higher, coffee drinkers reportedly enjoyed improved flavor. The bottled coffee market has expanded beyond the traditional canned coffee drinkers to include women and members of the younger generation.

### **Multifunction rice cookers**

The year saw a growing trend toward using rice cookers to bake cakes or cook stew and other slow-cooking dishes. This approach to cooking owes its popularity to its startling innovation as well as to its remarkable easiness. Once the cook has entered the ingredients, the dish cooks by itself without so much as a temperature adjustment. New rice cookers equipped with bread-baking and stewing functions have appeared on the shelves, and publishers have rushed to publish cookbooks devoted to recipes for preparing new dishes with multifunction rice cookers.

### **Low-calorie soft drinks**

Various new carbonated beverages that taste as good as their predecessors, but unlike other low-calorie soft drinks contain only half the calories, have made their appearance on the market. First introduced in Japan, these beverages have met an enthusiastic reception.

### **Long-life batteries**

These new batteries boast battery lives one-and-a-half times as long as those of conventional alkaline dry-cell batteries — and about two times as long when used in digital cameras. Sales of these long-life batteries, which represent the first major advance in cylindrical dry-cell battery technology since the introduction of alkaline batteries some 40 years ago, exceeded all sales targets.

### **Boneless fish and fish with edible bones**

‘Boneless fish’ is a term for frozen fish with all the bones removed for easy eating. The size of the market for these products is estimated at about 20 billion yen per year. Fish with edible bones, meanwhile, undergo special processing to soften the bones and make them chewable and digestible. These products have attracted consumers, such as families with small children and school lunch programs, who have tended to avoid fish in the past because of the bones.

### **Biometric authentication**

Biometric authentication systems employ fingerprints, voiceprints, palm-vein recognition and other physical characteristics to confirm people’s identities. Many of the products for the consumer market are designed for use with personal computers or mobile phones and for accessing financial services. The systems are also being implemented by businesses and local government bodies to control access to personal information storage areas in preparation for full implementation of the Law Concerning the Protection of Personal Information in 2005.

### **Nanotechnology products**

Employed to alter the characteristics of materials by manipulating substances at the nanometer (one-billionth meter) level, nanotechnology has spawned new products with improved functions in rapid succession. Popular examples include room air cleaners that

eliminate viruses and unpleasant odors by releasing tiny nano-scale ions, sun-screen products produced from nano-sized powders that spread evenly on the skin and block UV rays, and clothing materials woven from fibers that have been treated at the molecular level to improve their durability and enhance their water resistance.

### **Health-conscious ovens**

These ovens, which bake with steam superheated to 300°C, are considered to promote better health, because dishes cooked this way contain less fat and salt and because vitamin C loss due to oxidation is reduced. Some 15,000 of the new ovens were sold in the first month following their introduction in September 2004 — one-and-a-half times the original sales plans.

### **Mini vegetables/pre-cut vegetables**

Shoppers found more choices in the vegetable section, including vegetables that were selectively bred to grow to about half or a quarter the usual size and vegetables that were already cut into appropriate sizes for cooking. Mini-vegetable varieties include radish, Chinese cabbage and squash. The growing number of single-person households has engendered demand for vegetables sold in small enough quantities to be consumed while still fresh.

### **Revamped Japanese cars**

A number of popular domestic automobile models underwent full model changes in 2004, retaining their former brand names but acquiring a whole new look. From exterior to engine, these models were redesigned from the ground up. Taking a fresh approach that disregarded their cars' established images enabled automakers to attract new customers.

### **Diarrhea medicine administered without water**

This new-style diarrhea medicine can be taken without water when the need arises on a train or in other inconvenient circumstances away from home. This product has proved especially popular among company employees, who sometimes suffer from acute-onset diarrhea due to stress or excessive drinking. Within a month of its launch in December 2003, the new medicine had captured a 10% share of the diarrhea medication market.

### **Many-cornered erasers**

Made by melding ten eraser cubes together, these erasers feature 28 corners and the ability to erase even the smallest print with ease. Sales of these innovative products have soared to over a million since their introduction in 2003. They can even be found in the museum shop at New York's Museum of Modern Art.

### **Vitamin-enhancing refrigerators**

The vegetable compartments in these refrigerators employ a special design that actually increases the vitamin C content of vegetables stored in them. This is achieved by installing an LED (light-emitting diode) in the vegetable compartment to stimulate photosynthesis. This marks the first time this function has been available in home refrigerators.

### **Play pool diapers**

Specially designed for young children to wear while playing in the water, these paper diapers do not swell up when they get wet. With the number of parks equipped with play pools increasing, sales of the diapers exceeded their original targets by threefold. Cut to look like swimwear, they offer a choice of dolphin, hibiscus and other such patterns.

## **Seeking emotional catharsis**

—The intoxication of deep emotion—

Sports. True love. Love between parents and children.

Content of this type, in which emotions are expressed directly without pretense or affectation, can trigger a catharsis that washes away the malaise and frustrations accumulating in daily life.

People long to be intoxicated by vital emotions welling up from the depths of their souls — especially in times when the society around them seems to be mired in apathy. And those who experience such emotions delight in talking about them and sharing them with friends. This type of consumer psychology came to the surface in 2004.

### **Widescreen flat panel televisions**

Sales of LCD and plasma TVs strengthened further in 2004, stimulated by the success of the Athens 2004 Olympic Games and the dissemination of digital broadcasting. Consumers love to experience the thrill of victory and other dramatic moments displayed clearly on large screens, and the new widescreen flat panel TVs satisfy this need perfectly.

During the period from January to October 2004, domestic shipments of LCD TVs expanded by 70% year-on-year to 1.91 million units and shipments of plasma TVs by 40% to 240,000 units.

### ***Sekai no Chushin de, Ai wo Sakebu (Crying Out for Love, from the Center of the World )***

This tragic love story describing the pure-hearted love and the eventual death of a high school student captured the imagination of the public and became a social phenomenon. Popularly referred by the abbreviated title *Sekachu*, the story was first told in a best-selling novel by Kyoichi Katayama that sold over 3.2 million copies. Made into a movie in May 2004, it attracted audiences numbering over 6.2 million and grossed over eight billion yen at the box office. It was subsequently made into a TV drama.

### **HDD-equipped DVD recorders**

Demand for DVD recorders increased dramatically, due in part to purchasing inspired by the Athens 2004 Olympic Games. DVD recorders equipped with built-in hard disk drives were especially popular. Domestic shipments of HDD-equipped DVD recorders climbed to 2.01 million units between January and October 2004, some 2.8 times the number shipped during the same period of the year before. These DVD players owe their popularity to their extended recording times, automatic recording of users' favorite programs and ease of operation.

### **The Athens 2004 Olympic Games**

The Japanese Olympic team captured 16 gold medals in Athens, tying the national mark set at the Tokyo Olympics of 1964. The whole nation tuned in day and night to watch the exploits of Japanese judo wrestlers, swimmers and track-and-field athletes. An event for the record books, and one that will be long remembered, the Athens Games also helped to boost demand for products in a diverse range of categories, including flat panel TVs,

DVD recorders, beverages and sporting goods.

### ***“Finding Nemo”***

The story line of this digitally animated Disney film about the misadventures of a clownfish father and son appealed to adults as well as to children, which explains why so many parents took their children to see it. Released in December 2003, it drew 9.12 million viewers to the theaters and grossed 11 billion yen in box office receipts. The first DVD shipment in June 2004 numbered over three million disks.

### **Super hot snack foods**

Spicy snack products made with habanero peppers, the world’s hottest peppers according to the *Guinness Book of World Records*, caught consumers’ attention after hitting the market in November 2003. By September 2004, total shipments had already exceeded 25 million packages. Habanero peppers soon made their way into curries and other food products as well, and these spicy dishes turned up the heat of the steamy Japanese summer.

### ***Hagane no Renkinjutsushi (FullMetal Alchemist)***

This animated TV series features two brothers with supernatural powers who can perform alchemy and transform one substance into another. Commonly referred to by the shortened name *Hagaren*, the program is especially popular among female junior high and high school students, but its broad fan base extends from elementary school pupils to adults. It has already sold 600,000 DVDs, and other products related to the series are also performing well. Release of a full-length animated feature film is scheduled for summer 2005.

### ***Fuyu no Sonata***

This TV series starring Korean actor Bae Yong-joon has acquired explosive popularity in Japan since it was first broadcast on BS (broadcast satellite) TV in 2002. The title’s shortened form *Fuyusona* was selected one of the top-10 buzzwords of 2004 in an annual competition.

## **The return of gorgeous**

As signs of recovery began to appear in Japan's economy in 2004, consumers took renewed interest in superior luxury goods. The demand for "high quality regardless of the cost" and desire to "exhibit elegance" they had evidenced during the boom years had slipped from sight as a deflationary trend took hold. A look at the hit products of 2004 reveals, however, that demand for high-quality luxury goods is making a comeback.

### **Digital SLR cameras**

The market for full-feature digital single-lens reflex cameras expanded rapidly in 2003, stimulated by the introduction of lower-priced popular models in the 100,000-yen range. Between January and September 2004, domestic shipments of digital SLRs increased 2.6-fold from the same period of the previous year to 250,000. The variety of available models has expanded remarkably as well across the range from professional-quality cameras with 16 million pixels to affordable models priced below 100,000 yen.

### **Photo printers**

These convenient printers can be connected to digital cameras and used to print photos directly. Their ease of use, with no PC required, has made photo printers especially popular with female, middle-aged and older consumers.

### **Upmarket hamburgers**

Distinctive "haute cuisine" hamburgers prepared with special techniques and carefully selected ingredients appeared on many menus in 2004. Their prices, typically 400 to 700 yen, or about twice the price of ordinary hamburgers, ranged upward to 800 yen and above. Initially test marketed at a limited number of outlets, their authentic flavor proved so popular that these upmarket burgers were added to menus nationwide in many cases.

### **Gourmet fast food**

Restaurants combining pleasant dining environments with fast food convenience began to appear in the United States in the late 1990s. Japan followed suit, with hamburger chains setting them up one after another based on this concept. These restaurants offer better-quality food for higher prices and provide improved service in comfortable surroundings.

### **Japanese luxury sedans**

Many Japanese luxury sedans that have been on the road for years underwent full model changes during the year. Besides incorporating the latest technologies to improve safety and riding comfort, the new models feature sporty lines and lavishly appointed interiors. Sales of the new luxury sedan models unveiled in 2004 have been brisk, with some registering sales of over 6,000 cars in their first month on the market.

### **Off-shoulder and open-back fashions**

Daring fashions revealing more of the shoulders and back struck a chord with young Japanese women during the summer months. “Macho tank tops” that exposed the back and shoulder blades and one-piece camisoles sold especially well. More elegant styles featuring slip-on jackets also caught on, and strong demand was seen for brassieres with removable shoulder straps to be worn with the new revealing apparel.

### **Condominium towers**

Large numbers of high-rise condominiums soaring to 20 stories or above have been built in the Tokyo Bay area. In addition to their stunning views, they attract residents with a varied offering of community facilities, such as sports clubs, theater rooms and day-care centers. And because residents of these tower condominiums generally have short commutes to work, they are said to enjoy more relaxed lifestyles.

### **Large-format minivans**

Some automakers launched new minivan models with three rows of seats that accommodate eight people comfortably. Because minivans are often used as family vehicles, the center of gravity has been lowered to make them easier for female members of the family to drive. In the first three weeks after the new models' introduction, dealers received orders for two-and-a-half times their original monthly sales targets.

### **European Luxury SUVs**

Demand for luxury SUVs built by prestigious European carmakers was unexpectedly high, despite their price tags of five million yen — about 20% above the price of the top domestic models. Their popularity has been especially notable among brand-conscious consumers.

## Japan-Asian styles

Asian values and lifestyles are attracting increasing attention of late in both East and West, and the Japanese are opening up to cultural influences from various Asian countries with which they have had little familiarity in the past. If this revitalization of the unique cultures of Asia and Japan continues, the Japanese may stop following the West and begin to recover their cultural self-confidence.

### **Japanese Major Leaguers**

The performances of Japanese baseball players in the U.S. Major League provided inspiration for people throughout Japan. Some of these ballplayers played leading roles on their respective teams, with one setting a new Major League record for single-season hits and another contributing significantly to his team's successful league championship campaign.

### **Bae Yong-joon (Yon sama)**

Star of the South Korean TV drama *Fuyu no Sonata (Winter Sonata)*, this actor also played the lead in a Korean boom that swept Japan. His refreshing smile and refined demeanor earned him legions of fans, especially among housewives, who gave him the affectionate nickname "Yon sama." His popularity has also brought "Yon sama" roles in many Japanese TV commercials.

### ***The Last Samurai***

This Hollywood film set in Japan during the years immediately after the Meiji Restoration stars Tom Cruise as an American military officer who becomes involved with a group of samurai fighting to preserve the way of the warrior. Released simultaneously in the United States and Japan, the film earned box office receipts of approximately 13.6 billion yen in Japan, and Japanese actor Ken Watanabe was nominated for an Academy Award for Best Supporting Actor.

### ***Hanryu (Korean) boom***

A fascination with South Korean television dramas, movies, and music referred to as *hanryu* swept the nation during the year. The Korean TV drama and film *Silmido*, among other works, excited widespread interest. Four handsome male Korean actors referred to

as the “Four Korean Kings” made frequent visits to Japan, as did several popular Korean actresses. Many Japanese returned their visits, signing up in large numbers for package tours to the South Korean shooting locations of popular programs.

### ***Kill Bill***

This “two-volume” set of Quentin Tarantino films, centered on a search for revenge, employs elements of samurai period dramas and kung fu movies, which it combines in stylish contemporary fashion. Volume I, set mainly in Japan and including such Japanese actors as Shinichi Chiba and Chiaki Kuriyama in its cast, acquired animated topicality.

### **Authentic *shochu* liquor**

Demand continued strong for *shochu* made in the traditional way from materials such as potatoes, barley, rice and brown sugar. Subtle differences in flavor and aroma stemming from variations in raw materials, brewing techniques and storage methods have contributed to this Japanese distilled liquor’s popularity. Prices of some brands rose as stocks dwindled, and a few of these acquired the appellation *maboroshi* (“rare brand”) due to their scarcity.

### **Asian beauties**

As used in Japan today, the term “Asian beauties” usually refers to a specific group of popular Asian actresses and models, including Chinese actress Zhang Ziyi, South Korean actress Choi Ji Woo and Japanese model Ai Tominaga. All are known for their lovely long black hair, and some have become international stars. Natural brown and black hair colors are coming back into fashion under these Asian beauties’ influence.

### **Oriental beauty shampoos**

These shampoos contain such natural Oriental ingredients as Korean ginseng extract and soybean protein that contribute to beautiful hair. The promotional image of an Asian woman with straight black hair appealed to female consumers, helping to boost sales to three times the target figures during their first six months on the shelves.

## LOHAS

An acronym for “Lifestyles of Health and Sustainability,” LOHAS refers to lifestyles that prioritize environmental preservation, personal health maintenance and pursuit of a sustainable society. The term grew out of a 15-year survey examining the value concepts of 150,000 subjects throughout the United States, the results of which were published in 1998 by American sociologist Paul H. Ray et al. The survey suggested that approximately 30% of the adult American population, or about 50 million people, and a further 80 million people in the EU can already be considered LOHAS-type consumers — or people who are willing to pay 20% more for products that promote mental and physical health and contribute to preserving the environment. Thus, LOHAS lifestyles can be described as “rich, tasteful and ecologically conscious.” In 2004, a succession of LOHAS-type products achieved hit status in the Japanese market.

### **Black vinegar**

Rich in natural amino acids, black vinegar is said to accelerate recovery from fatigue and provide various other health benefits. Conventionally used for cooking, it is increasingly being mixed with water and drunk as a beverage. The overall market for vinegar-based drinks was estimated at some 13 billion yen in 2004, of which the market for black vinegar products accounted for about six billion yen. Juice products combining black vinegar with fruit juices or honey to enhance its palatability have also been launched.

### **Bittern (brine) products**

Bittern’s richness in such natural minerals as magnesium and iron has inspired expectations for its potential beauty and health benefits. Besides being imbibed as a food-and-beverage additive, it has found its way into a number of other products in various fields, including bittern bread, bath salts and cosmetics.

### **The *tonyu* (soymilk) boom**

Soymilk is attracting attention as an excellent source of good-quality protein and soy isoflavones, a beneficial form of estrogen, and for its effectiveness in promoting weight loss. The market has welcomed soymilk-based breads and desserts as well as even soymilk soaps and soymilk lotions, and sales of juicer-mixers for home soymilk production have also been brisk.

### **IH (induction heating) stove tops**

These new kitchen appliances employ electromagnetic induction for cooking, so that only the pot or pan itself heats up. The absence of an open flame enhances their safety, and they are easy to keep clean as well. Another attractive feature is the capability they offer for precise temperature control. The number of IH stove tops in use is increasing steadily due to these features, and makers have begun introducing new models suitable for use in circumstances requiring extremely high temperatures, such as in Chinese cooking.

### **All-electric homes**

These homes rely on electricity to meet all their energy needs, including power for their kitchen appliances and heating and cooling systems. Most are equipped with IH stove tops, electric water heaters and electric floor heating systems. The absence of open flames reduces the risk of fire, and their freedom from carbon dioxide emissions provides the additional merit of environmental friendliness. These factors are contributing to making these new-style homes increasingly popular, and the number of “all-electric” condominiums is rising as well.

### **Dukeswalk**

This exercise method was developed by Duke Saraie, the “Walking Doctor.” It is based on his theory that making large movements while walking promotes better health and body beautification and teaches practitioners to walk more gracefully. Saraie’s 2003 book, *The Im Walking Diet*, has sold 500,000 copies, and his videos and DVDs have also achieved bestseller status.

### **Black bean cocoa**

This new beverage product is made from a blend of cocoa and black beans, which are rich in antioxidant polyphenols and soy isoflavones, respectively. Popular TV programs attracted attention to polyphenols and soy isoflavones with reports on their effectiveness in promoting beauty and health among women. Combining the two ingredients in the same product succeeded in attracting women of various ages.

### **Green tea health drinks**

Green tea beverages contain health-promoting flavonoids such as catechins, which help to reduce body fat, and polyphenols, which boast antioxidant properties. Some of these products have even received government approval as FOSHU (Foods for Specified Health Use). Efforts to attract middle-aged and older consumers who were unaccustomed to purchasing green tea in PET bottles have succeeded in expanding sales.

### **Soybean peptide products**

A byproduct of the breakdown of soy proteins, soy peptides are absorbed by the body more rapidly than amino acids. They are reputed to be effective in accelerating recovery from fatigue and promoting energy metabolism. Many companies introduced new functional foods and beverage products containing soy peptides in 2004.

### **Home kitchen waste composter**

Despite their reduced size and price, these new home composter models retain the odor suppression and waste reduction functions of their predecessors. They have proved popular with small households in urban areas as a result. Unusually hot summer weather and moves by some local governments to adopt fee-based waste collection systems also stimulated sales. Overall domestic shipments of kitchen waste composters rose by 61.2% in August 2004 as compared with the same month of 2003.

### **Coenzyme Q10 products**

Coenzyme Q10 is said to be effective in promoting recovery from fatigue and in preventing aging. Proponents claim that it rejuvenates the body from within, and coenzyme Q10 supplements have become increasingly popular as a result, especially among women. Sales were so strong, in fact, that a lengthy supply shortage occurred. The government approved the use of coenzyme Q10 in cosmetics in October 2004, and coenzyme Q10 skin care products have already appeared on the market.

### **Yoga/Pilates**

Yoga, which promotes relaxation and helps maintain a balance between body and mind, and the Pilates exercise method, designed by Joseph Pilates to condition internal muscles, have both soared in popularity. The Pilates method began to attract notice, particularly among young Japanese women, after its adoption by a number of Hollywood stars.

Fitness clubs are offering lessons, and exercise apparel and other products have become available.

### **Solar homes with no electric bills**

The builders of these homes claim to have eliminated heating and lighting costs through the combined use of rooftop solar panels and reduced-rate nighttime electric power supply. Power generated by rooftop solar generation equipment is used to heat water and operate all the household appliances, including everything from the water heaters to the kitchen range. Any surplus power generated is purchased by the regional electric utility.

### ***Kampo***

*Kampo*, an approach to medicine developed based on ancient Chinese natural philosophy, is enjoying a revival. New user-friendly products such as herbal medicines in teabag form have been introduced, and skin-care brands containing herbal components have also entered the market. Fashionable *kampo* pharmacies targeting young women are laying plans to expand their store networks.

### **Electric water heaters**

These electric water heaters employ CO<sub>2</sub> as a natural coolant and heat pumps to boil water. They achieve superior energy efficiency and use electricity only during late-night hours, when power rates are reduced, in order to minimize operating costs. The natural coolant is environmentally friendly, moreover, and does not damage the ozone layer. More and more electric water heaters are coming into use as the number of all-electric homes increases nationwide.

### **House dust countermeasures**

Brisk sales were recorded by new products designed to help consumers cope with house dust. These include sprays that adhere to house dust, making it easier to vacuum, and room deodorant sprays with functions added to prevent house dust from becoming airborne. The proliferation of airtight homes with limited air circulation has increased concern about house dust as a major cause of allergies, especially among children.

### **Radio-controlled watches**

Radio-controlled watches receive radio waves from one of two transmitters located in Japan and adjust the time automatically to Japan Standard Time to ensure that the correct time is always displayed. Since some models are solar-powered, moreover, the wearer never needs to adjust the time or change the battery.

### **Body composition analyzers**

These devices resemble bathroom scales, but they measure body fat, muscle mass, visceral fat, basic metabolism and other health indices as well as weight. Because they not only enable users to monitor changes in their weight, but also contribute to a better understanding of their body's internal health status, these analyzers have attracted purchasers among health-conscious consumers.

### **Low-carbohydrate diets**

Low-carbohydrate diets have acquired topicality since it was reported that many Hollywood actresses were using them to lose weight. Commonly referred to as "low-carb diets," they restrict the intake of carbohydrates and encourage the consumption of protein from meat or other sources along with vegetables. Originating in the United States, these diets have now caught on in Japan as well.

### **Designer home electrical appliances**

These home electrical appliances are specially designed down to the last detail. Examples include an LCD TV built to look like a conventional TV picture tube and a humidifier shaped like a drop of water. Not only did these simple yet distinctive products cause a stir, but the unusual approaches adopted to market them also attracted interest. Sales outlets stocking them often added a café corner, for example, and they were also sold through interior goods and owner selection shops.

### **Plasters promoting natural healing**

More than simply covering and protecting cuts, these plasters actually accelerate healing by stimulating people's natural healing powers. Made from a hydrocolloid material often employed in hospitals and other medical circumstances, they are effective in helping to maintain a proper body fluid balance. Not only have sales exceeded expectations steadily since their introduction in March 2004, but sales of large plasters had to be suspended

temporarily due to supply shortages.

### **Mystical cosmetics**

This term refers to a line of makeup and cosmetics that adopted a brand name resembling a magic spell and package designs depicting crowns, heraldic emblems and similar images. The line is targeted primarily to women in their late teens to early 20s. It has won the hearts of many with both its product quality and its association with a mystical worldview.

### ***Maka* products**

Dietary supplements made from *maka*, an edible root native to Peru, acquired popularity among consumers in 2004. Besides containing essential amino acids, *maka* is rich in vitamins and minerals. Best-known for its ability to restore virility, it is also said to be effective in alleviating sensitivity to cold and in treating menopausal disorders. It has found new users among women as a result, and a *maka*-based liqueur targeting women has recently been introduced.

### **Nutritional education**

This trend refers to educational programs and activities covering a variety of food and diet-related subjects essential to physical and mental health. Issues such as food safety, obesity and undernourishment stimulated interest in this field initially, and since fiscal 2003, promotion of nutritional education has been positioned as an important governmental policy. Food producers and major supermarket chains are implementing programs based on this theme.

### **Home renovation**

Home remodeling or renovation involves renewing the interiors and room layouts of older homes and condominium units while incorporating some of the antique charm of the original. Unlike renovations conducted to repair damage, this type of remodeling aims simply to refresh and renew the dwelling. Home renovation is proving particularly attractive to young people in their 20s and 30s, who have discovered they can acquire a home suited to their personal tastes cheaply by purchasing a pre-owned house or condominium and having it renovated.

### **Boom in spiritualism**

A new trend finds people seeking healing and increased vitality through spiritualism. Many visit fortunetellers, invoke the help of “power stones” or have their dreams interpreted in their search for spiritual anchorage. Others have taken to making pilgrimages to so-called “power spots” or Shinto shrines. A book by the spiritual counselor Hiroyuki Ehara became a bestseller in connection with this trend. It might also be noted that one reason for the popularity of yoga among young women lies in its promise of mental stability.

### **Food-related professional qualifications**

Professional qualifications in the food field are attracting increasing interest. People with these qualifications include food coordinators, who are responsible for the overall coordination of people and things involved in anything connected with food, and who work as professionals in the field of food business planning and management. In their capacity as experts in food cultivation and preparation, meanwhile, vegetable and fruit “meisters” play the role of vegetable and fruit “sommeliers,” who are prepared to advise people concerning their eating habits. Many housewives and female office workers are among those seeking these qualifications.

### **Wary emergence**

—Less reclusive “*otaku*”—

The year saw a proliferation of products designed to enable users to create their own unique “personal space,” whether at home or away. The people normally referred to as “*otaku*” tend to be social misfits with an addiction for some aspect of pop culture who rarely emerge from their shells. But these new-style products equip users to create a comfortable personal space virtually anywhere. We may be witnessing the appearance of a new type of *otaku* who is beginning to interact, although somewhat warily, with the outside world.

### **Portable digital audio players**

Designed to record and play back music digitally, these pocket-sized portable players with large-capacity internal hard disks capable of storing from 1,000 to as many as

10,000 songs were a huge hit. Their superlative design and ease of use added to their popularity.

### **Ringtone songs**

This service targeting users of third-generation mobile phones allows users to select the voice of a popular recording artist as their telephone ringtone. All the mobile phone companies now offer the service, and in November 2004, a new type providing full chorus downloads was added to their number.

### **Blogs**

Internet blogs enable people to create or update their own homepages simply by filling in pre-prepared forms. They are commonly used to comment on current events or other websites, or as personal online diaries. And since visitors can type in comments easily or indicate that they have quoted something on their own blog, the blogs have a communication function as well. The fact that some well-known people have begun publishing online blog diaries has also elicited considerable interest among consumers.

### **Spacious mini and small cars**

A number of new mini and small car models feature interiors with a much more open feel than earlier models in these categories. Besides this expanded interior space, they boast extremely cute exterior and interior designs and come fully equipped with the latest interior amenities. All of these factors have made them popular with women in their 20s and 30s. Some models sold twice or three times as well as expected during their first month in the showrooms.

### **Products for bath-time fulfillment**

A variety of new products have been introduced to add greater luxury to the bathing experience through their effect on beauty, health or relaxation. These extend beyond warm-bath powders that help to beautify the skin to the likes of waterproof TVs, floating candles, plastic books that can be read while half submerged and various other items designed to transform bathing into a bona fide leisure activity. Other products introduced for the bathroom area itself include bath heater/dryers with a sauna function and bathtubs that maintain a set bath-water temperature for extended periods.

### **Mini-minivans**

These further down-sized minivans feature three rows of seats in a compact frame. Recognition of these minivans rose during the year as Japanese carmakers brought out a succession of new models. The overall design and interior functions of some of these models have been upgraded to appeal to younger drivers as well as to the young families who make up the traditional minivan customer base.

### ***Mama gals***

These girls in their late teens or early twenties are already mothers, but they still cling to the so-called “gal-style” look. They continue to sport gaudy “gal-style” fashions and makeup while struggling to raise their young children. These young women often form mothers’ circles (known as “mamasa—”) to exchange information.

### **Digital pet-fostering — renewed versions**

The introduction of updated versions of the digital pet-fostering game that engendered a huge boom in the late 1990s has revived interest in this type of activity. The new models are capable of participating in matchmaking activities and interaction with other users’ pets through infrared communication. Three million of the pets were sold in the six months following their introduction in March 2004, of which two million were sold overseas.

### **Email code characters**

Junior high and high school girls have started using email code characters to communicate. Also known as “gal characters,” these codes combine Japanese *katakana* characters with other symbols for certain words or parts of words in mobile phone email messages. One reason for their popularity is that the cryptic messages written with them are difficult for outsiders to decipher, which promotes a sense of group camaraderie.

### **NEETs**

An acronym for “Not in Employment, Education or Training,” NEET refers to unemployed young people and others who are neither working, studying nor enrolled in job-training programs. Unlike “freeters,” or free-lance part-time workers, NEETs have no desire to find work, making it difficult for public employment offices to obtain accurate information about them. A study by the Ministry of Health, Labour and Welfare

revealed that the number of NEETs aged 15 to 34 swelled to 520,000 in 2003, an increase of 40,000 compared with the previous year.

### ***Moe*-responsive contents and products**

*Moe* (“sprout” or “burst out”) is a term Japanese use to describe an obsession with cute young female animated characters or pop “idols.” Character goods associated with the animated objects of fascination are not limited to animated films. They also include such items as English vocabulary wordbooks and multi-volume encyclopedias on various subjects targeting an audience mainly comprising young men. These English wordbooks are so popular that one of them has sold about 170,000 copies.

## **Adult self-expression**

Since the bursting of the economic bubble, and influenced by the difficulties encountered by job seekers, young people have tended to view both consumption and culture with little enthusiasm. The market for products targeting adult consumers, on the other hand, has recently seen a recovery in demand. These products center on goods and services designed to help them enjoy their lives more boldly as independent adults. Consider fashions, for example. Growing numbers of people of all ages are taking pleasure in controlling the way they appear to others. This year’s hit product trends sense a strength in today’s adults to abandon the old concept of a “retirement age for fashion-consciousness.”

### **Free magazines/newspapers**

Many new magazines and newspapers are suddenly being distributed free of charge on street corners and in railway and subway stations. Many local information and coupon magazines were seen in the past, but more generalized information magazines have recently gained prominence. These increasingly diversified magazines target readers ranging from women to young businessmen.

### **Brain stimulation boom**

New attention is focusing on ways of preventing senility by stimulating the brain. Simple brainteaser books for adults have established a solid market among members of the 50-to-80-year age group, and one series, in particular, *Drills to Strengthen the Adult Brain*, has sold over 1.7 million copies since its publication in November 2003. This subject has also been taken up by television, where several quiz shows with an IQ theme are currently on the air.

### ***Hello Work for 13 Year Olds***

This popular book by best-selling novelist Ryu Murakami achieved sales in excess of a million copies. An illustrated guide to the realities of the job market, it covers a total of 514 occupations, from medical doctor to chef and from stag beetle farmer to horse race handicapper. The book excited comment by encouraging readers to “choose an occupation they love.”

### **Better and stronger hair growth tonics**

New and improved hair growth tonics poured onto the market during the year. Some of these products included natural medicines in their formulas and promised to promote hair growth while simultaneously preventing hair loss. Others doubled the concentrations of their active ingredients as compared with products already on the market to enable women to use them as well. The strong market for these products is a clear indication that today’s adult consumers want to look young as long as possible.

### **Mini-skirt fashions**

The mini-skirts rising 10 cm above the knee donned by many teen-aged girls caught on among female office workers, who aspire to greater elegance. Refined, more mature tweed designs that were sexy without excess sold well in this market. Mini-skirts with boots were requisite items in every wardrobe.

### **Fountain pens**

Certain signs suggest that fountain pens might be making a comeback. Manufacturers report strong sales, and makers are moving to introduce new models. The customer base seems to be expanding beyond the traditional segment of males in their 40s and 50s to encompass an increasing number of younger people. These developments have been

accompanied by a rise in orders for custom-made fountain pens designed to accommodate users' individual writing pressure and habits.

### **Directly attachable hairpieces**

These artificial hairpieces are attached directly to the scalp using a new type of ultra-thin film technology. They resist removal by pulling and permit trimming with hair clippers and shampooing like normal hair. Some companies have increased their customer base by 50% in just one year since launching the products.

### **Order-made men's clothing**

Order-made suits and jackets tailored to the body's contours and reflecting the customer's tastes are seen with increasing frequency. Some shops have begun offering "pattern order" suits made by assembling ready-made patterns at prices in the 30,000-yen range. "Easy order" services that handle alterations of lapel patterns and other basic design elements of existing suits are also proliferating.

### ***The Howl of the Loser Dog***

An essay published under this title by well-known author Junko Sakai explored the attitude that, no matter how beautiful or accomplished at her job she may be, any unmarried woman aged over 30 with no children is a "loser." Sakai's unique approach to her subject and the high-impact title she gave it captured widespread attention, catapulting the essay to best-seller status. Total sales exceeded 300,000 copies, an extraordinary achievement for an essay.

### **Men's cosmetics**

New markets are beginning to form in response to men's growing awareness of their own beauty. The main targets of these markets are "metrosexuals" — urban males in their 20s to 40s with large disposable incomes. Department stores have added special sales corners for male cosmetics, and one newly introduced men's skin-care brand is racking up sales amounting to nearly twice the original projections. Aesthetic salons and nail salons that men can use without hesitation are also attracting growing numbers of businessmen who are concerned about grooming and appearance.

## **Social networking websites**

### **(Social networking services)**

These online community services enable members to network with others who share their hobbies or business interests. Since new members must be introduced by a current member, users of a service can expand their circle of acquaintances without the discomfort of dealing with complete strangers. The popularity of these services in the United States prompted a venture company to introduce a similar service in Japan. Launched in February 2004, it had already attracted some 180,000 users by November.

## **Leg-enhancing suits**

The slacks of these suits are designed to make men's legs look longer, and the jackets are cut to create a slimmer silhouette. The material, pattern and even the positioning of the pants pockets are carefully designed to create a shapely appearance. Pants that beautify women's legs have long been part and parcel of women's apparel, but this type of product made a hit with men for the first time in 2004.

## **Vibrant nostalgia**

—Reaching back to recapture Showa vitality—

“Vibrant nostalgia” describes the mentality of the many consumers today who enjoy looking back fondly on the “good old days.” Various revival goods have become hit products in the past, but this trend soared to new heights in 2004 with the appearance of retro products designed to revive memories of the vibrancy and vitality of Japan's high-growth years during the Showa era. Now that the nation seems to be recovering from a slump that lasted over a decade, especially, this trend toward a “vibrant nostalgia” eagerly embracing the vitality and the wisdom of the Showa era will bear watching in coming years.

## **Authentic green tea beverages**

New authentic green tea beverages appeared on the shelves one after another in 2004. One product developed jointly with a traditional green tea merchandiser in Kyoto received a warm reception from young, middle-aged and older consumers alike because

of its refreshing authentic taste and its presentation in a PET bottle designed to resemble a bamboo cylinder. Twenty six million cases had been sold within seven-and-a-half months of its introduction.

### **Classic revivals for TV**

Famous literary works appearing in new form as TV drama series during the year included Toyoko Yamasaki's *Ivory Tower* and Seicho Matsumoto's *Vessel of Sand*. Both proved extremely popular. Viewer ratings in the Kanto district for the final episode of Fuji TV's *Ivory Tower* reached 32.1%, while *Vessel of Sand* achieved ratings as high as 21.5% for Tokyo Broadcasting System (TBS). A resurgence of interest in the original novels boosted sales of the books as well.

### ***Doraemon* boom**

The year saw a revival of interest in *Doraemon*, a long-popular cartoon series, primarily among adults in their 20s and 30s. A 25-volume encyclopedia explaining *Doraemon*'s world was published in installments over a one-year period. After the first print run of 300,000 copies sold out in just three days, a second printing of 300,000 copies was made. And an all-night *Doraemon* movie screening targeting adults attracted a full house.

### ***Hachi-ji Dayo! Zen-in Shugo (It's 8 O'clock! Everybody Gather)***

A set of DVDs released to mark the 40th anniversary of the formation of The Drifters comedy group contained famous scenes from the Japanese TV comedy series *Hachi-ji Dayo! Zen-in Shugo*, which was aired on TBS from 1969 to 1985. The DVDs sold well, not only among former fans wishing to reminisce about the past but also among younger people who had never seen the original program. Together they have snapped up a total of 270,000 of the DVD sets.

### ***Kido Senshi Gandamu SEED (GUNDAM SEED)***

In this ninth sequel to the popular *GUNDAM* TV cartoon series, the boyishly handsome hero attracts a new generation of teen-aged female fans who were not in the original *GUNDAM* fan age bracket. The 13 DVDs in the series have sold a combined 1.3 million copies, with accompanying sales of eight million plastic *GUNDAM* models. The *GUNDAM* sound track featuring a theme song performed by a popular singer has sold 450,000 copies.

## **Queen**

After some three decades, the British rock band Queen enjoyed a boom in popularity after one of their songs was selected as the theme song for a TV drama series starring popular actor Takuya Kimura. A Japan-exclusive release of Queen's *Jewels* album recorded sales of more than 1.2 million copies.

## **Retro game machines and software**

Several companies commemorated the 20th anniversary of the introduction of home video games by manufacturing reproductions of the early game consoles and software and bringing them back to market. Websites marketing the revival game software were flooded with advance orders, and several titles sold out almost overnight. Portable game machines modeled on the nostalgic consoles were introduced simultaneously.

## **Minato Mirai Line**

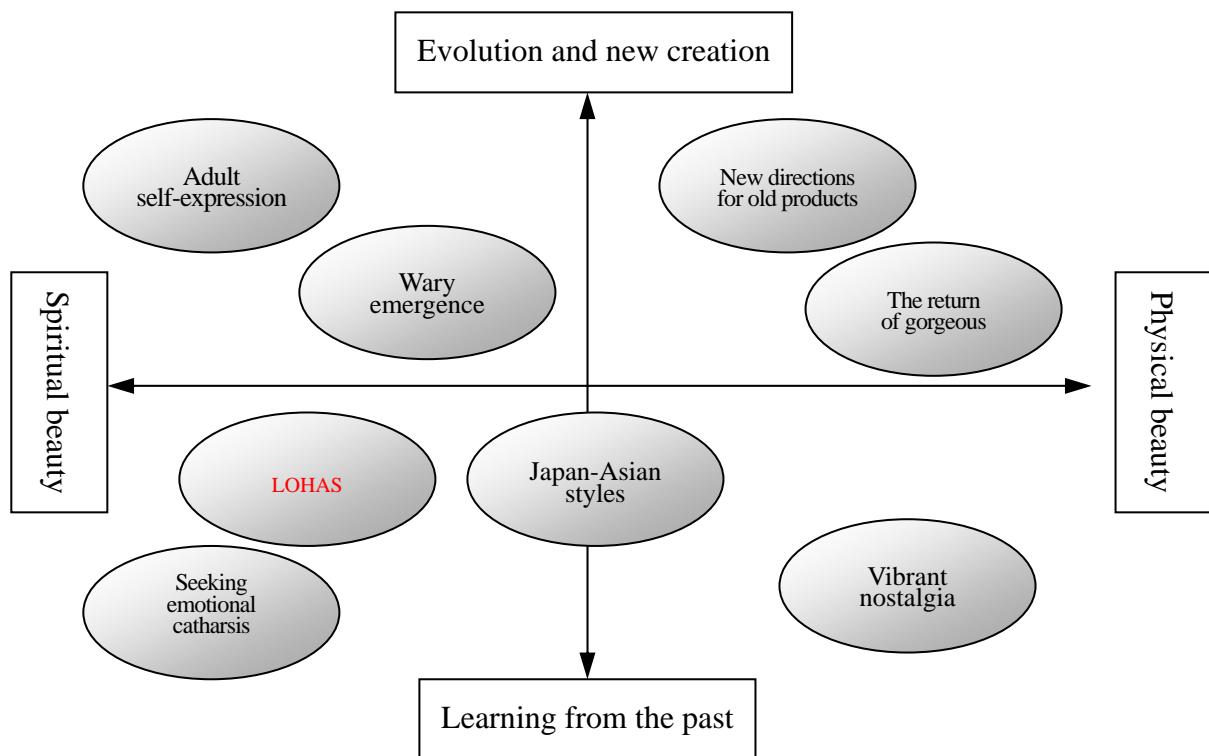
In February 2004, the Minato Mirai subway line began carrying passengers from Yokohama Station, through the bayside Minato Mirai 21 district, to Yamashita Park, Chinatown and Motomachi. Since the new subway line is connected with the Tokyu railway line with its terminal in Shibuya, it is now much easier for Tokyoites to visit Yokohama's many popular sightseeing spots. As of May 2004, the new line was averaging 120,000 passengers a day.

## **Hello Kitty's 30th birthday**

2004 marked the 30th year since the introduction of Sanrio's popular Hello Kitty character. Various commemorative goods, including limited-edition platinum Kitties and commemorative coin sets were issued to mark the occasion, and some sold out completely.

## **'70s and '80s TV series on DVD**

DVD versions of popular TV drama series from the 1970s and '80s were released in rapid succession during the year, creating a stir among TV viewers. The releases included a number of series, such as *Ikenaka Genta*, *80 Kilos*, *Stewardess Story*, and *Sukeban Deka (Gangster Girl Detective)*, that still have a fan following, mainly comprising viewers in their 30s and 40s, which contributed to their topicality.



### 2004 Hit Products and Hot Topics Top 10 List

- No. 1: Widescreen flat panel televisions
- No. 2: Japanese Major Leaguers
- No. 3: *Sekai no Chushin de, Ai wo Sakebu* (*Crying Out for Love, from the Center of the World*)
- No. 4: HDD-equipped DVD recorders
- No. 5: Black vinegar
- No. 6: Bittern (brine) products
- No. 7: The *tonyu* (soymilk) boom
- No. 8: Bae Yong-joon (Yon sama)
- No. 9: *The Last Samurai*
- No. 10: Packet fixed-rate communications fees for mobile phones

Note 1: The above products were chosen from approximately 140 popular products included in an Internet survey. Total scores in the categories of “recognition,” “attraction and interest,” “topicality” and “nationwide popularity” were calculated and indexed to determine the top 10 products of 2004.

### “Hit Product Recognition Survey” Overview

- 1. Survey area: Nationwide
- 2. Survey subjects: Individuals (men and women) aged over 15
- 3. Sample size: 1,000 (responses received)
- 4. Subject selection: Subjects were randomly selected from a list of registered monitors
- 5. Survey type: Closed Internet study
- 6. Survey period: November 2 to 8, 2004

## Part II Forecast of 2005 Consumer Trends Based on 2004 Results

### Magazine Editors' Predictions of the Hit Products and Hot Topics of 2005

2004 Theme  
**New directions  
for old  
products**

#### Forecast for 2005

##### **Breakthroughs into new territory**

Product development aimed at transforming mature products or technologies into new hit products and creating new consumption patterns in domains entirely different from those of the original products will continue to advance as methods of creating new breakthroughs become firmly established.

- Protest motifs · *La petite philosophie*/Light philosophy
- New mobile phone-related services · Casual golf
- Station interiors · Affinity of fashion and modern art
- Lamb · Sneakers · European casual

2004 Theme  
**Seeking emotional  
catharsis**

#### Forecast for 2005

##### **Thrill seeking**

Rather than seeking emotional fulfillment through passive interaction with software or other content, people will begin searching for new types of more proactive recreational consumption.

- Fortune-telling · Motorcycles
- Japanese pro baseball (Pacific League) · Basketball
- Individualized rock festivals
- Replacement of “rest days” with “recreation days”
- *The Pink Panther* (film sequel) · Regional characters
- Pingu's 25th birthday

2004 Theme  
**The return of  
gorgeous**

#### Forecast for 2005

##### **Selective luxury**

Growing numbers of intelligent consumers will begin to apply their own taste standards to select and enjoy individualized luxury, a trend that might be referred to as “selective luxury.”

- Money games/Internet stock trading
- Foreign brand flagship stores in Ginza · Ginza Renaissance
- Renewal of Japanese hot springs inns
- Pricey tours to hidden paradises and exotic out-of-the-way

- places · Large-displacement motor scooters
- Nagoya-style discount stores · Japanese luxury automobiles
- Chef dispatching and catering
- Competition among Tokyo hotels · Sweeter sweets
- Luxurious men's shoes · Luxury watches

2004 Theme  
**Japan-Asian  
styles**

Forecast for 2005

**Culture surfing**

Consumers will embark on a kind of culture surfing, a consumption style resembling TV channel zapping that embraces or adapts cultural elements and products, not only from Japan and its Asian neighbors, but also from Europe, North America, Africa, the Middle East and other regions.

- Renewed appreciation for Japanese seasonal events
- The Dalai Lama
- Chubu (Central Japan) International Airport opening

2004 Theme  
**LOHAS**

Forecast for 2005

**MELOS (Meiji- and Edo-conscious Lifestyles of Sustainability)**

The recycling-oriented lifestyles of the Edo and Meiji eras will attract renewed interest among increasing numbers of people. New products and lifestyles drawing on the wisdom of these earlier periods are expected to appear on the scene.

- Medical science-based health-consciousness
- Yoga-style breathing · Commuting to gyms
- The 2005 World Exposition, Aichi, Japan · Vinegar drinks
- Black-toned health foods · Hybrid cars · Old clothing

2004 Theme  
**Wary  
emergence**

Forecast for 2005

**Emerging from the shell**

Many new products reflecting the trend toward “wary emergence” will be developed to satisfy a diversifying range of personal preferences and life stages. As individuals pick and choose among these products, the pop culture geeks Japanese refer to as *otaku* will take on more variegated images.

- Information dissemination by blog
- Internet literature publishing · Portable video games
- Portable digital audio players

- New York bars and restaurants that serve customers in bed
- Personalization

2004 Theme  
**Adult  
 self-expression**

Forecast for 2005

**Adult personal development**

Products, services and experiences that cultivate the “inner adult” as well as external appearance will gain in popularity.

- Favorable views of late marriage
- Advances in aging prevention · People in their 50s
- Skin-care products for men
- Digital SLRs under 100,000 yen · Rosé champagne

2004 Theme  
**Vibrant nostalgia**

Forecast for 2005

**Synergy of the old and the new**

Instead of simply trading on nostalgia associated with “the good old days,” 2005 can be expected to bring products that create a synergy of the old and the new by presenting nostalgia for “genuine articles” in new, more contemporary packaging.

- Renewed appreciation of “the genuine article”

Cooperating magazines: *ChouChou*, *DIME*, *BRIO*, *Hanako*, *smart*, and others.

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