



MASTER'S
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Digital Marketing in Luso-Nihon: A Comparative Study from Portugal to Japan

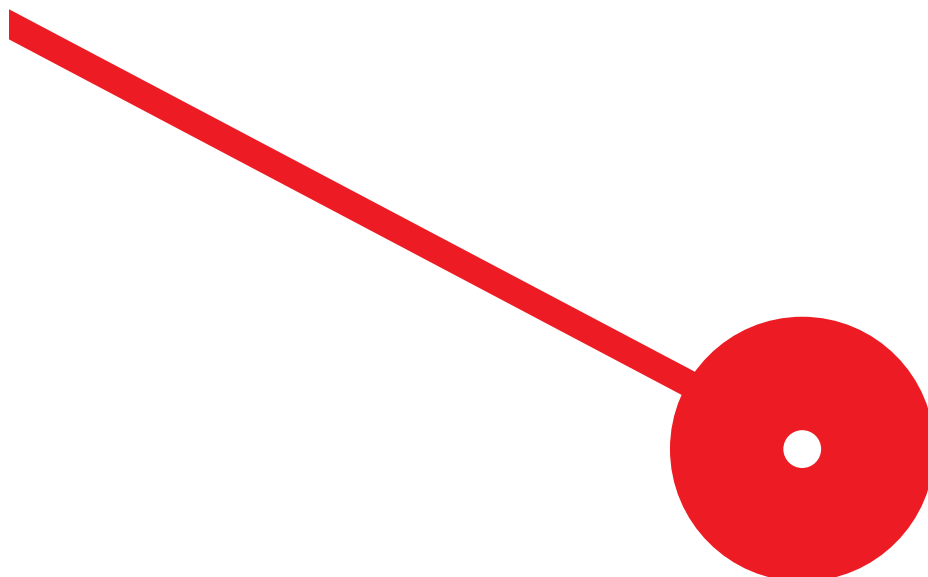
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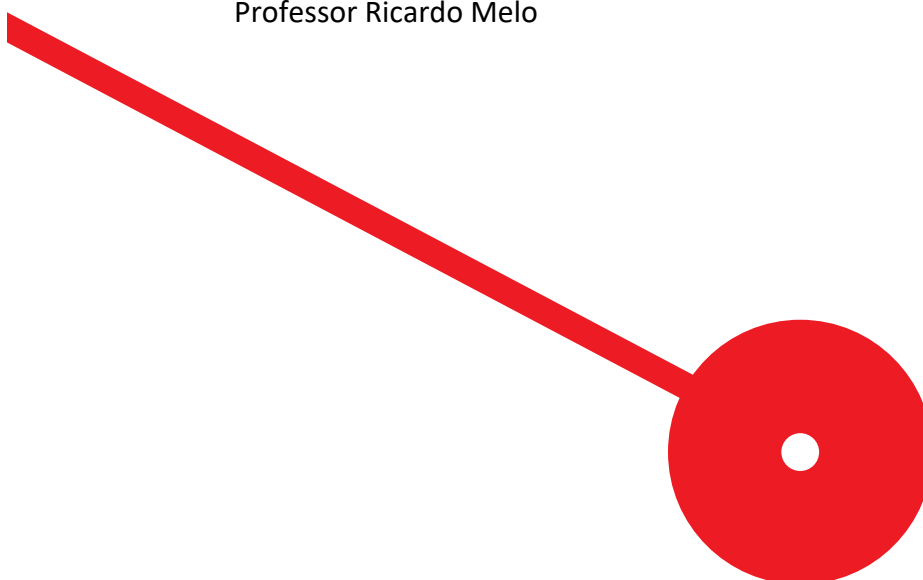
Digital Marketing in Luso-Nihon: A Comparative Study from Portugal to Japan

Rui Pedro Carneiro Bessa

Master's Thesis

presented to the Porto Accounting and Business School for obtaining a master's degree in Digital Marketing, under the supervision of Professor Ricardo Melo

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Abstract:

Portugal and Japan have a long history of cultural and commercial exchange. However, digital marketing approaches and strategies are influenced by several factors, including cultural factors specific to each country. This is evident in the differences in digital marketing approaches between Japan and Portugal, which has a direct impact on Portuguese or Japanese companies seeking to reach audiences in the other country. There is a need to understand whether companies in one country can learn from the other.

Through literature review and qualitative research, based on unstructured interviews conducted with five Japanese and Portuguese professionals in the field, the results suggest that companies in Japan respond more slowly to digitisation, customers prioritise online privacy, digital communication has higher formality requirements, and advertising materials tend to have a greater amount of text and colour clash. The empirical experience reported by the interviewees following the analysis of the interviews was contrasted and compared with the literature review. On this basis, it is concluded that Japanese companies can learn from Portuguese digital marketing strategies, as the way digital marketing has been approached in Japan to date cannot be considered the most effective. The opposite cannot be said of Portuguese companies since they have shown to execute digital marketing strategies more congruently with market demand and current reality.

Keywords: digital marketing strategies, comparative study, Japan, Portugal

Resumo:

Portugal e o Japão têm uma longa história de intercâmbio cultural e comercial. No entanto, as abordagens e estratégias de marketing digital são influenciadas por vários fatores, incluindo factores culturais específicos de cada país. Isto é evidente nas diferenças de abordagem do marketing digital entre o Japão e Portugal, o que tem um impacto direto nas empresas portuguesas ou japonesas que procuram alcançar audiências no outro país. Há necessidade de compreender se as empresas de um país podem aprender com o outro.

Através de revisão de literatura e investigação qualitativa, baseada em entrevistas não estruturadas realizadas com cinco profissionais japoneses e portugueses na área, os resultados sugerem que as empresas no Japão respondem mais lentamente à digitalização, os clientes dão prioridade à privacidade online, a comunicação digital tem maiores exigências de formalidade, e os materiais publicitários tendem a ter uma maior quantidade de texto e choque de cores. A experiência empírica relatada pelos entrevistados após a análise das entrevistas foi contrastada e comparada com a revisão da literatura. Nesta base, conclui-se que as empresas japonesas podem aprender com as estratégias de marketing digital portuguesas, uma vez que a forma como o marketing digital tem sido abordado no Japão até à data não pode ser considerada a mais eficaz. O oposto não pode ser dito das empresas portuguesas, uma vez que demonstraram executar estratégias de marketing digital de forma mais congruente com a procura do mercado e a realidade atual.

Palavras-chave: estratégias de marketing digital, estudo comparativo, Japão, Portugal

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Due to the strong cultural differences between East and West, business practices are subject to differences, but also similarities, which are worth studying. This applies to marketing and more specifically to digital marketing, which was introduced to the world very recently if we consider the technological evolution over the centuries.

Japan is characterised by advertising and communication content that is quite particular, but very widespread throughout the world, often associated to animated characters, video games, the automobile industry and technology. Advertising and communication in Portugal follow a Western creative line, often associated to themes like cultural tradition, family, cuisine, and adaptation to different age groups. Portugal is the author's country of origin, in which he resides and pursued his studies. While Japanese culture has always been a topic of interest for the author, Portuguese culture and the reality of digital marketing in the Portuguese industry integrate his field of expertise. In this sense, it was decided that the comparative research between eastern and western digital marketing strategies would focus on Japan and Portugal as objects of study.

Research Problem

With the first contact between Japan and Portugal occurring in 1543, the two countries celebrated the 150th anniversary of the Treaty of Peace, Friendship and Commerce in 2020 (*Bilateral Relations*, 2021). In fact, exports from Japan to Portugal totalled 59.9 billion euros, and imports from Portugal to Japan totalled 80.3 billion euros (*Japan-Portugal Relations*, 2021).

In a globalised world, and thanks to social media, it is now possible to reach audiences and customers in both countries. That is the case for several brands, such as *1756 – The Portuguese Wine Company*, *A Poveira*, *Canon*, *Fujitsu*, *Henricarnes*, *Honda*, *KPMG*, *Mitsubishi*, *NTT Data*, *Ramirez*, *Sumol + Compal* and *Yamaha* (*Associates - CCILJ*, 2021).

Looking at the differences in business and culture between Japan and Portugal, there is a need to understand if Japanese companies could benefit and learn from Portuguese digital marketing strategies, or if relying on their own strategies is what is best for the Japanese market and why. Portuguese companies and marketeers should also be able to learn from

Japanese strategies and adapt their own. With that in mind, shared strategies may also validate their success in both markets.

Comparing digital marketing strategies from different countries, especially ones that are very distinct in their cultures, may be valuable for business and research development. Even though there is potential for a mutual exchange of ideas, approaches, and best practices, there are also major cultural differences that translate into different approaches to marketing, and in particular digital marketing. As such, this thesis sets out to analyse, compare and contrast the different approaches to digital marketing in Japan and Portugal.

Research Goals

Some **general goals** can be exposed in order to guide this study, such as:

- Understand the advantages and disadvantages of current digital marketing strategies, in Japan and Portugal.
- Find out what gaps in digital marketing must be corrected in both markets.
- Understand if digital marketing strategies used in one country could work if used in the other country.
- Contribute to the growth of Japanese and Portuguese companies.
- Improve the training of students, researchers, and professionals in the field of marketing.

The research is thus intended to measure the following **specific goals** as well:

- Determine how cultural differences between both countries weight in defining companies' digital marketing strategies.
- Understand the needs and consumption habits of Japanese and Portuguese customers, considering their use of digital media.
- Understand the options of Japanese and Portuguese companies in the creation of advertising content used in digital media.

Research Questions

When we consider the research problem and the theoretical framework which will be explored in the following chapter, a set of questions can be developed. Their formulation results from the presentation of the research goals and the inherent theoretical framework that will be presented in the following chapter. These questions will be answered in the results analysis. As such, the **main question** that arises is:

- What are the differences and similarities in Japanese and Portuguese digital marketing strategies?

From this question, more **specific questions** can be branched and answered throughout this research:

- How do Japan and Portugal respond to digitization in marketing?
- How do Japanese and Portuguese customers behave online?
- How do Japanese and Portuguese companies communicate online with customers?
- How do Japanese and Portuguese companies create advertising materials for online dissemination, and how do they differ for different audiences?

Methodology

Comparative research on digital marketing strategies from Japan and Portugal is a pioneering study in the research field. As such, we developed research under a qualitative method and analysis procedure.

We started by doing an extensive literature review, prioritizing academic sources such as articles in scientific journals, books from relevant authors in their respective fields, dissertations, and theses. We used themes and keywords such as: *marketing, marketing function, marketing definition, marketing mix, marketing strategy, digital marketing, digital marketing strategy, marketing technologies, digital marketing techniques, cultural differences, culture definition, importance of culture, cultural dimensions, Japan and Portugal, digital marketing in Japan, digital marketing in Portugal, Japanese social media, Japanese customer behaviour, Portuguese social media, Portuguese customer behaviour*. To find literature, we relied primarily on Google Scholar and B-on.

Five non-structured online interviews were also conducted, providing personalised points of view and primary data from relevant professionals to the theme. Our motivation for each conducted interview was guided by a main question, which relates to the research questions we previously defined. Respondents were selected using a snowball method, on the recommendation of previous respondents and other professionals.

Igor Voroshilov moved from Russia to Japan to pursue graduate studies while on a Japanese government scholarship. He founded his own company, an app which allows users to get automatic discounts in different establishments by posting pictures of their products on Instagram.

Nuno Santos is responsible for a marketing agency which targets university students. Between brand activation actions and social media management, it allows students to obtain discounts in different services through a chatbot.

Estêvão Gomes has travelled to Japan in 2014, where he had the opportunity to visit his company's branch in Tokyo. He got to know different strategies determined by Ecco, regarding business management, marketing, and ecommerce, for both the Japanese and the Portuguese markets.

Donny Kimball moved to Japan when he was a student. Since he graduated, he has worked in marketing agencies and found his way up as a digital marketer. In 2020, he built his own agency.

Inês Carvalho Matos has conducted research about Japanese culture in Japan. She works as a consultant for Portuguese citizens who want to visit Japan and vice-versa. She has collaborated with many different entities from both countries throughout her career.

Table 1 contains descriptive information about the five interviewees, who consented to participate in our study. Table 2 contains the motivational questions by which each interview was guided.

We conducted all the interviews through *Zoom* remote meeting software. With the interviewees' due authorization, they were recorded. Igor Voroshilov and Donny Kimball's interviews were conducted in English, while Nuno Santos, Estêvão Gomes, and Inês Carvalho Matos' interviews were conducted in Portuguese.

Name	Igor Voroshilov	Nuno Santos	Estêvão Gomes	Donny Kimball	Inês Carvalho Matos
Nationality	Russian	Portuguese	Portuguese	American	Portuguese
Role	CEO & Founder	Managing Partner	Production Planner	Head of Digital Marketing	Project Owner, Consultant, Researcher
Company	LikePay	Rede	Ecco Shoes	AdVertize	Japan & Portugal Cultural and Pedagogical Project
Website	likepay.dev	rede.com.pt	group.ecco.com	advertize.jp	umlongoveraonojapao.com
Type of company	Startup	Agency	Multinational	Agency (Startup)	Independent project
Foundation	2019	2004	1963 (Denmark)	2020	2012
Field	Web and mobile development	Marketing	Shoe brand	Digital marketing	Japanese studies and tourism
Location	Tokyo, Japan	Lisbon, Portugal	Aveiro, Portugal	Tokyo, Japan	Portugal and Japan
Interview date	15 th March 2021	10 th May 2021	12 th May 2021	17 th May 2021	28 th May 2021
Interview duration	1 hour and 29 minutes	1 hour and 6 minutes	1 hour and 45 minutes	1 hour and 22 minutes	1 hour and 10 minutes

Table 1 – Descriptive information of the interviewees.

Igor Voroshilov	How does social media impact the Japanese culture?
Nuno Santos	How does the digital marketing experience work and how does a professional in the field behave in Portugal?
Estêvão Gomes	Which differences and similarities between the Japanese and the Portuguese markets can be observed by the same industry?
Donny Kimball	How does the digital marketing experience work and how does a professional in the field behave in Japan?
Inês Carvalho Matos	What cultural differences and similarities characterize Japanese and Portuguese customers?

Table 2 – Questions which worked as motivation for the conducted interviews.

Later on, we drew on Laurence Bardin's *Content Analysis* book (Laurence Bardin, 2011) to code and categorise the content of the interviews. We transcribed the interviews and used *Taguette* software to encode them and find common keywords. Through the analysis and identification of themes, based on the literature review and the common keywords from the interviews, we structured the results in three categories. These categories contain different associated themes, respectively:

- digitization of marketing strategies (traditional marketing vs. digital marketing and e-commerce)
- culture and customer behaviour towards digital marketing strategies (cultural influences, online privacy, and online customer preferences)
- communication as a digital marketing strategy...
 - a. media (social networks and other media)
 - b. content (language and design).

We then analysed the results of the research by comparing the literature, the information provided by the interviewees and the Japanese and the Portuguese versions of a website. By pursuing this analysis, we finally drew conclusions and answered the research questions by which the study was guided.

CHAPTER I – THEORETICAL FRAMEWORK

1 Marketing

The thesis addresses the different marketing approaches, in particular digital marketing between Portugal and Japan. As such, it starts with an approach to the main concepts of marketing and digital marketing.

Marketing is the science by which companies engage customers, build strong customer relationships, and create customer value in order to capture value from customers in return (Kotler et al., 2020). The globally considered marketing-mix tools (Kotler & Keller, 2016) are:

- the Product that is sold (physical goods or services),
- the Price that is charged and how it impacts the brands,
- the Place where the product is sold or promoted,
- the Promotion actions or strategies that are used to attain customers.

The marketing function is a process by which companies align themselves with the market they have decided to serve (Fifield, 2007). It plays a valuable role in connecting the customer to the product, service delivery and financial accountability. Moreover, a company's perception of financial, customer relationship and new product performance is heavily influenced by the marketing function (Moorman & Rust, 1999).

Each business strategizes marketing considering its sector of activity, goals and target audience (Baker, 1992). A strategy maintains a balance between ends, ways, and means it identifies objectives and ensures the management of resources and methods available for meeting such objectives (Freedman, 2013). Thus, marketing strategy is a company's integrated pattern of decisions that specify its crucial choices concerning products, markets, marketing activities and marketing resources in the creation, communication and/or delivery of products that offer value to customers in exchanges with the company and thereby enables the latter to achieve specific objectives (Varadarajan, 2010). Because selecting a marketing strategy will affect and influence everything that a company does, a marketing strategy is always inevitably interlinked with the corporate strategy (Baker, 1992). To fully integrate their marketing strategies, companies must also develop digital marketing strategies, which are built accordingly to a brand's segmentation, target audience and positioning (Kotler & Keller, 2016).

Digital marketing, which can also be called ‘internet marketing’, ‘e-marketing’, ‘web marketing’ or ‘online marketing’, is an adaptive, technology-enabled function by which companies collaborate with customers and partners to jointly create, communicate, deliver, and sustain value for all stakeholders (Kannan & Li, 2017; Todor, 2016). It brings together customisation and mass distribution to accomplish marketing goals (Piñeiro-Otero & Martínez-Rolán, 2016), applying digital technologies encompassing desktop, cellular phone, tablet, and other digital platforms (Christina et al., 2019).

Digital marketing manages different forms of online company presence, such as websites and social media pages, in conjunction with online communication techniques (Chaffey & Ellis-Chadwick, 2016).

Digital marketing strategies provide companies with tools to improve several aspects of marketing, such as branding, user experience (usability and functionality), interactivity and community connections, communication, segmented and customised advertising, virality (word of mouth), and measuring output (Piñeiro-Otero & Martínez-Rolán, 2016).

The marketing-mix of 4 Ps, which was introduced earlier in this chapter, serves digital marketing through the following considerations by companies (Kingsnorth, 2016):

- Product: how the product will sell online.
- Price: benefits from online discounts and offers, by promoting the product through a third-party website in exchange for paying a commission or fee to the website when an action is taken (affiliate marketing).
- Place: fast and easy-to-find locations for online shops and related information, making use of search engine optimization, paid search, and other digital acquisition channels.
- Promotion: online communication and advertising, including search engine marketing tools, social media posting and targeted advertising, etc.

Digital marketing technologies provide customers with an updated company information by accessing the internet from any place, at any time (Yasmin et al., 2015). Technological convergence and the multiplication of devices have turned digital marketing into a user-centred, more measurable, ubiquitous, and interactive concept (Piñeiro-Otero & Martínez-Rolán, 2016). In fact, digital tools can be very useful to the marketing function. Marketing automation tools, for instance, are used to automatize marketing activities (Mayer-Schönberger & Cukier, 2014; Todor, 2016). By producing big data from

websites, social media or direct calls, companies get to know their customers, analyse them and predict their behaviour (Mayer-Schönberger & Cukier, 2014). In this way, web analytics help to collect, measure, understand, analyse, plan, report and predict the web activities of a business. It is important for analysing the market, and evaluate how the different components of the digital marketing strategy is helping to achieve the business goals (Bala & Verma, 2018; Ryan, 2014).

Digital marketing is not limited to the content of the message, because it also includes links with customers; also, it represents a powerful tool for building, consolidating, and maintaining brand awareness (Tiago & Veríssimo, 2014). Blending digital and traditional marketing campaigns helps to retain customers and increase their brand awareness (Todor, 2016). By doing that, the impact of the brand can be developed in customers' minds, allowing them to separate the brand from similar ones, perceive its social position and the content that it represents (Cizmeci, 2015).

Communication is a key component of any digital marketing strategy. Communication techniques, which are used to acquire new customers and to provide services to existing customers, include search engine marketing, social media marketing, online advertising, and email marketing (Chaffey & Ellis-Chadwick, 2016). These techniques are described in more detail below.

1. Search engine marketing activities are conducted through search engine advertising and optimization. In the first case, companies pay to have links to their web sites displayed in the sponsored section of a search engine results page, such as Google, Bing, or Yahoo. In the latter, companies strive to push the rankings of their web sites higher in the organic search results. Sometimes, search engine optimization can be achieved with no payments made to search engines through different techniques, or by hiring external consultants who will develop specific techniques (Dou et al., 2010).
2. Social media marketing activities aim to engage customers in the online social locations where they usually spend time. This can be done by publishing digital content such as videos, images, podcasts, or written reviews. The goal is to reach the target audience on what they are interested in and connect this back into the business, where data can be processed and used to create the next round of customer experiences and hence the next round of conversations. When content is shared and analytic results are considered, a company can encourage other

customers to make similar purchases, help a marketer discover the most adequate online advertising technique, and create a socially accepted mean to dialog with customers (Evans & McKee, 2010).

3. Online advertising can take the form of search, classified and display advertising. Search advertising appears along with the organic results on search engines. Classified advertising appears on websites that do not provide other media content or algorithmic search. Finally, display advertising includes ads in the form of banners, plain text, videos or advertised posts on social media websites. Among its main benefits, online advertising allows follows for a substantial reduction in the cost of targeting when compared to offline advertising (Goldfarb, 2014).
4. Email marketing plays a big role in digital marketing techniques, since email messages can develop brand awareness, consideration for a product, conversion (from interest to purchase behaviour), product usage, and detention and loyalty of the customer (Mullen & Daniels, 2009).

2 Cultural differences

This section contributes to the main objective of the thesis, presenting cultural differences that may manifest themselves in the analysed case studies. Some of the themes raised here will be retrieved throughout the document, allowing us to revisit this review in the research results.

Culture is a complex whole which includes knowledge, belief, art, law, morals, custom, and any other capabilities and habits acquired by man as a member of society (Tylor, 1871).

Culture conditions humans' worldview interferes on their biological plan and in the different ways they participate in life events. Culture is dynamic and has its own logic (Laraia, 2007; Triandis et al., 1986). It influences people's values and affects their attitudes, and then behaviour (Adler, 1986).

Hofstede established six independent cultural dimensions to characterize different national cultures (Hofstede, 2011; Kwok & Tadesse, 2006):

1. Power Distance, related to the different solutions to the basic problem of human inequality. It is defined as the extent to which the less powerful members of institutions and companies within a country expect and accept that power is distributed unequally.
2. Uncertainty Avoidance, related to the level of stress in a society in the face of an unknown future. The extent to which the members of a culture feel threatened by ambiguous or unknown situations and have created beliefs and institutions that try to avoid these is reflected in the score on this dimension.
3. Individualism versus Collectivism, related to the integration of individuals into primary groups. The fundamental issue addressed by this dimension is the degree of interdependence a society maintains among its members.
4. Masculinity versus Femininity, related to the division of emotional roles between women and men. The fundamental issue here is what motivates people, wanting to be the best (masculine) or liking what you do (feminine).
5. Long Term versus Short Term Orientation, related to the choice of focus for people's efforts: the future or the present and past. This dimension describes how every society must maintain some links with its own past while dealing with the challenges of the present and future, and societies prioritise these two existential goals differently.
6. Indulgence versus Restraint, related to the gratification versus control of basic human desires related to enjoying life. This dimension is defined as the extent to which people try to control their desires and impulses, based on the way they were raised.

Following Hofstede's comparative model (Hofstede, 2011), we can position Japan relatively to Portugal through a score on each dimension. This country comparison is a personal adaptation from Hofstede Insights ('Country Comparison', 2021), a global cultural advisory which builds on the work of Prof. Geert Hofstede. It is represented in attachment I and explained in table 3.

	Japan	Portugal
<p>Power Distance</p> <p>Japan – 54 Portugal – 63</p>	<ul style="list-style-type: none"> • Japanese society is very hierarchical, but not to an extreme. • The Japanese education system is meritocratic. • In business, decisions must be approved by each hierarchal layer. It is a slow process, but a higher-position worker does not hold too much power in decision making. 	<ul style="list-style-type: none"> • There is hierarchical distance in Portuguese society and powerful people tend to be privileged or in control. • Unmotivated employees, who feel they do not add value, will struggle to provide their bosses with negative feedback. Bosses will need to pay attention and find out about eventual problems by themselves.
<p>Uncertainty Avoidance</p> <p>Japan – 92 Portugal – 99</p>	<ul style="list-style-type: none"> • Japan is one of the most uncertainty avoiding countries on earth, due to natural disasters. • There are a lot of rituals and ceremonies. Dress codes and uniforms are very common. • Changes are difficult to realize. • In business, risk is avoided at all costs. 	<ul style="list-style-type: none"> • Portuguese oppose to non-traditional ideas or uncommon behaviours. • There is a resistance to innovation and an emotional dependence on rules, working hard and being busy, punctuality, precision, and security.
<p>Individualism vs Collectivism</p> <p>Japan – 46 Portugal – 27</p>	<ul style="list-style-type: none"> • Japanese people put harmony of group above the expression of individual opinions. • Japan has been a paternalistic society. 	<ul style="list-style-type: none"> • Portuguese are loyal and collectivist, whether in relation to family or other relationships. • Relationships between employers and employees carry a moral connection and

	<ul style="list-style-type: none"> • Although Japanese are loyal to their companies, such loyalty is something which they choose for themselves. • They are usually private and reserved. • Japanese are experienced as collectivistic by Western standards and experienced as Individualist by Asian standards. 	<p>people management usually take employees' in-groups into account.</p>
<p>Masculinity vs Femininity</p> <p>Japan – 95 Portugal – 31</p>	<ul style="list-style-type: none"> • Japan is one of the most masculine societies in the world. The competition is commonly between groups and not individuals. • There is a drive for perfection in products, services, and presentation. • Workaholism is notorious. • When compared to men, women face hardship in advancing with their careers. 	<ul style="list-style-type: none"> • Portugal relies on consensus and avoids excessive competitiveness. • Equality, solidarity, and quality of working life is valued. • Decision making is supported by involvement and conflicts are supposed to be solved by negotiation.
<p>Long Term vs Short Term Orientation</p> <p>Japan – 88 Portugal – 28</p>	<ul style="list-style-type: none"> • Japanese rely on traditions and norms, virtues, and good examples. They are at peace with doing their best in life. • Aiming at the durability of the companies, while serving society and stakeholders for many years, there is a high rate of investment in 	<ul style="list-style-type: none"> • Portuguese respect traditions and are eager to establish the absolute truth. • There is little concern about saving for the future and quick results are prioritized.

	<p>Research & Development.</p> <p>The own capital rate is also high, and the steady growth of market share is prioritized over a quarterly profit.</p>	
<p>Indulgence</p> <p>vs</p> <p>Restraint</p> <p>Japan – 42</p> <p>Portugal – 33</p>	<ul style="list-style-type: none"> • Japanese believe in restraint by social norms. They tend to be pessimist and suppress the gratification of their desires. 	<ul style="list-style-type: none"> • In general, Portuguese are similar to Japanese in terms of restraint.

Table 3 – Comparison on cultural dimensions from Japan and Portugal accordingly to the Hofstede’s comparative model. Retrieved from ‘Hofstede Insights’.

3 Digital marketing in Japan and Portugal

3.1 Digital marketing in Japan

Social and cultural factors have substantial impact on Japanese customer behaviour, leading people to want to be a part of a group or a community and keep a strong consciousness of Japanese identity (Takahashi, 2019). Product selection criteria are very strict among Japanese customers in general. They are willing to pay high prices for quality products, such as luxurious and exclusive brands which they consider beneficial for their lives (Miura, 2014, as cited in Rönkkö, 2014). Moreover, Japanese customers are found of new products and pay close attention to small defects on them. There are strict quality control standards in Japan and the Japanese tend to be oriented to new trends, changing their preferences from time to time (ibid). They prefer product variation to similarity, and their satisfaction comes from having a wide variety of goods at their disposal (ibid). Japanese are also strongly influenced by others’ behaviour, following a same pattern of purchasing. Their propensity to collectivism causes a characteristic lack of self-reliance,

so Japanese customers might easily depend on the decision-making process of someone else in buying behaviour (ibid). Primary characteristics of Japanese customer behaviour are listed in table 4.

Process	Condition	Example	Influential factor
Before making a purchase decision	Varied alternatives	Anything can act as purchase goals; product variation is preferred.	Larger scale of awareness
When making a purchase decision	Strict selection criteria	Several factors are considered; quality is extremely important.	Aesthetic sense
After marking a purchase decision	Varied selection results	Product selection floats from time to time.	Feelings and collectivism

Table 4 – Primary characteristics of Japanese consumer behaviour. Adapted from ‘The Development of a Digital Marketing Strategy to Gain Active Mobile Game Users in Japan’.

Something important to consider is that Japanese customers tend to be more private in their online presence than in other countries. Users avoid sharing photos of their faces and entering personal information on online platforms, since they worry about safety and having companies using their data for marketing purposes (Taskila, 2019). Also, loyalty to cultural customs is very strong in Japan and its business culture is no different. Japan is a hierarchical society and most positions with decision-making power in companies are held by senior workers, who are more reluctant to adapt to digital transformation (Usui, 2014).

Business digitization has been a slow process in Japan, and because of that, the adoption of digital marketing strategies and skills has been slower in the Japanese corporate world than in the West. Although digital marketing strategies have been present in Japanese business, they tended to be used as support to the marketing function, while traditional marketing practices were usually the first choice for companies (Neely, 2017). After the emergence of COVID-19, digital marketing continues to grow in importance within the

Japanese market and digital strategies have been becoming even more crucial to business success (Kyle, 2021).

In Japan, a digital marketing strategy should be specifically targeted to Japanese customers. Marketing localization is the key factor to the competition. By conducting a local competitor analysis, marketers can trace the current trends in digital marketing and online advertising models in similar industries (Rönkkö, 2014). Japanese being the world's higher spenders on mobile apps, Japan has become the world biggest ads spender along with a high smartphone penetration rate. Therefore, it is crucial to consider smartphone optimization (ibid). In any digital marketing strategy in Japan, another important factor to consider is content and product translation to the Japanese language, since customers do not consume goods that are not available in Japanese (ibid). Besides de language, website design should also be congruent with the characteristic aesthetics of the Japanese audience (ibid). When brands want to communicate effectively with customers through social media, marketing content needs to be managed accordingly to the Japanese culture and linguistic features. Japanese customers expect a similarity to themselves, a 'Japanese-ness' from the agents and the content with which they interact (Ito & Gehrt, 2020).

When marketing their products, Japanese companies tend to bet on distinctive strategies that would be difficult to apply in any other countries, like using storytelling in the shape of "anime" for video advertising (Darusalam & Tawami, 2019). It is very common having products, services, events, and policies represented by a 'kyara' (diminutive of 'kyarakutaa', which comes from the English word 'character'). These cartoon characters or imaginary creatures, designed through the process of anthropomorphism, are extremely common when marketing goods (Occhi, 2010). In Japan, anthropomorphism is a powerful communicative tool that is frequently used in advertising, creating comfort and affinity to goods and brands. Cute characters provide cues to Japanese customers, resulting in generated sales and a positive brand reputation. They are also used to guide customers towards specific behaviours (Occhi, 2010), namely through social media.

In 2020, 36.2% of Japan's advertising expenditures were made on the internet (*Advertising Expenditures in Japan*, 2020). From the 126.3 million people in Japan, 93% actively uses internet and 83.1% do it solely through mobile devices (*Digital 2021: Japan*, 2021). Almost 77% (96.95 million users) use social media (*Japan: Number of Social Media Users 2026*, 2021). Illustrative graphics of this data can be seen in attachments II

to IV. The most used social media platform in Japan is YouTube, closely followed by the Japanese platform LINE. Twitter, Instagram, and Facebook are also highly used, respectively. A ranking of the most popular social networks in Japan can be seen in attachment V (*Digital 2021: Japan*, 2021). The demographics of some of these platforms (LINE, Facebook, Twitter, YouTube, and Instagram), reported by the Japanese Ministry of Internal Affairs and Communications in 2016, can be seen in attachment VI. Although LINE is a promising platform for marketers in Japan, it is still not fully developed, and it has many restrictions regarding advertising. It is important to note that LinkedIn in Japan is primarily used by job hunters, and even the amount of Japanese job hunters in the platform is not huge, due to other more established platforms existing in Japan (Taskila, 2019).

3.2 Digital marketing in Portugal

Portuguese customers especially value the informative and disseminating component of trends that can have the publications of brands on social networks (Magano & Cunha, 2020). Because they want to be able to consult the information they want, when they want and where they want, by simply accessing their smartphones, mobile optimization is very important for Portuguese customers (Borges, 2019). The internet use of the Portuguese has increased in the last decade, which has highly influenced e-commerce and internet sales. In fact, digital brand activity it is often the first way for customers to engage with a brand or product (Uttrup, 2017) and digital communication plays an important role in shifting behaviour of the population in specific contexts of marketing (Soares & Sousa, 2021). Portugal's usage of social media marketing tends to be highly focused on Facebook, with less attention on Instagram, and with barely any thought given to Twitter (Passerini, 2019). Customer behaviour over the Internet depends on age, and access to promotions, fun, convenience, speed, and downloads are the main drivers for the Portuguese to buy online. Online buyers have a greater sense of confidence and security with digital payment systems (Figueiredo et al., 2019).

There is still a way to go for national companies when it comes to digital transformation (Ferreira, 2018). Even though information and communication technologies and social networking are highly embraced in the Portuguese market (Tiago & Veríssimo, 2014), 59% of Portuguese companies do not have an adequate online presence, having no

website, social media page or being absent from Google Maps (Bandeira, 2019). Therefore, the study of marketing and communication education in Portugal proves to be extremely important, not only for the academic context, but also for the companies themselves (Cardoso et al., 2019).

In fact, new and small companies such as start-ups commonly face a limited knowledge on the adoption of digital marketing. Even if digital marketing is critical for them, they highlight difficulties in recruiting and training skilled professionals to enhance results (Teixeira et al., 2018). Digital marketing tools provide Portuguese companies with the means to communicate and differentiate themselves, raising their competitiveness in an extremely competitive market. Since they tend to be free and easy to manage, and allow great interactivity with the target audience, they are usually the preferred tools for small and medium enterprises (M. Oliveira, 2021).

For instance, websites are important informative tools and a central point of any digital marketing strategy, namely when worked optimally in conjunction with other traffic channels such as social networks, search engines, blogs, email and mobile (Borges, 2019). Visually attractive websites generate few results if the online presence of the brand and its interactivity are not properly worked on (Sebastião et al., 2012). However, it is important to point out that increasing sales in Portuguese companies does not only depend on the digital marketing communication tools that are used, but also on their usage in conjunction with traditional tools (T. C. de Oliveira, 2015).

A forecast from 2017 expected internet advertising expenditure in Portugal to increase up to 185 million euros in 2019 (*Digital Advertising Expenditure in Portugal from 2007 to 2019*, 2021). An illustrative graphic of this data can be seen in attachment VII. From the approximately 10.2 million people in Portugal (*Portugal Population*, 2021), 75.35% actively uses internet (*Share of Households with Internet Access in Portugal from 2007 to 2020*, 2020) and 70.42% do it solely through mobile devices (*Mobile Internet User Penetration in Portugal from 2016 to 2026*, 2021). Illustrative graphics of this data can be seen in attachments VIII to X. Like in Japan, almost 77% of the Portuguese population use social media. The most used social media platform in Portugal is also YouTube, closely followed by Facebook. WhatsApp, Facebook Messenger, and Instagram are also highly used, respectively (*Digital 2021: Portugal*, 2021). Illustrative graphics of this data, including a ranking of the most popular social networks in Portugal, can be seen in attachments XI and XII. The share of the audience that marketers can reach with adverts

on social media in Portugal, by age group and gender (*Digital 2021: Portugal, 2021*), can be seen in attachment XIII.

Based on the information retrieved from the literature review and provided by the five interviewees, we structured the results in the following categories: 1) digitization of marketing strategies, 2) culture and customer behaviour towards digital marketing strategies, and 3) communication as a digital marketing strategy. Each one analyses several different themes which were commonly addressed in the interviews.

Digitization of marketing strategies focuses on how Japanese and Portuguese companies adapted their marketing strategies to the online context, considering the evolution of Internet and the global use of digital means in business, and consequently in marketing. This category addresses how relevant traditional strategies still are in both countries, when compared to digital strategies. It also compares the presence of e-commerce and how it commonly works in the Japanese and the Portuguese markets.

Culture and customer behaviour towards digital marketing strategies analyses how Japanese and Portuguese customers behave when confronted with marketing, especially regarding digital strategies, due to their culture. It explains how culture influences purchasing decisions, reactions to advertising or brands. Online privacy is also compared by studying in which ways customers value the protection of their own data. Considering customer habits in Japan and Portugal, an analysis of their preferred digital devices and search engines is also included this second category.

Communication as a digital marketing strategy addresses media and content. By analysing media, we can understand how networks are used in both countries, and what preferences companies and customers have regarding social media. Other means of media, which can influence how social networks are used as well, are also considered. Finally, we focus on language and design by analysing content. Language is a vital part of any communication material anywhere in the world, thus requiring different approaches in Japanese and Portuguese languages. The ways that communication materials are designed and presented to the public are also heavily influenced by culture and behaviour, making an analysis of design in content from both countries an important theme of our results.

By analysing the available data from our five interviews and comparing it to the data we gathered from literature, we intended to create a valuable discussion that could generate further conclusions which may answer our research questions and meet our goals for this study.

To facilitate the identification of the interviewees, in sections 4 to 6 they are referred to according to the abbreviations in table 5.

Abbreviation	Name
K	Donny Kimball
G	Estêvão Gomes
V	Igor Voroshilov
M	Inês Carvalho Matos
S	Nuno Santos

Table 5 – Abbreviations of the interviewees' names.

4 Digitization of marketing strategies

When something is converted into a digital format, digitization happens. With the evolution of technology in the world, business in both Japan and Portugal has been adapting to digital throughout the years. Marketing is an evident field where digitization plays a crucial role, so much that we can currently say that there are no marketing strategies without digital.

As stated by K, Japan faces poor digitization. There is an abbreviation for it in Japan, which is “DX” and comes from the words “digital transformation”. By working directly in the field, K wants to help Japan digitize and be able to untap all the related demand of digital marketing that exists in the country. The Japanese are aware of the value of online. According to K’s words, “everyone understands that attention is shifting away, but the question is more about how to do it”. So, in Japan there’s a general lack of understanding of digital marketing. There is no word for marketing in Japanese and the concept falls between the words ‘public relations’ (*koho*) and ‘advertising’ (*kokoku*). As an example, K mentions that there's not an understanding of the democratization of distribution tools when it comes to any sort of online ads, and that there's not as many people who are subject to trying new things and making mistakes on their own. The reasons for digital being far behind relate to culture and even language, which will be discussed in the

following sections. K acknowledges that Japanese do not recognize social media as “a two-way street for communication” which requires engagement from both the brand and the customer, but instead they see these publishing platforms as “places to just run ads”.

While it is undeniable that Japan is technologically advanced to a certain extent, as in robotics for instance, it is also a fact that the Japanese industry still relies highly on outdated practices and resources. K regrets that advanced knowledge in robotics and artificial intelligence in Japan are not leveraged for digital marketing, such as in automated copywriting tools. K and M both highlight the extensive use of fax machines on companies, as well as written letters and the repetitive filling in of paper forms as bureaucracies. V mentions that a factor that slows down the process of digitization in business is that “it is not the way how they do things”, meaning that there is a rooted reluctance to change in the culture of Japanese society. The hierarchical norms in which the country relies on also limit digitization, as will be explained in the following section. In fact, K mentions that is common that top-level managers or buyers do not even understand the basics about digital marketing, and he exemplifies by referring that he once had someone from a Japanese company asking him what was “that sharp thing” when he was faced with a hashtag. K believes that not everyone in the Japanese industry is ready for the sheer volume of sales that are available online, and that’s why there still is a high inefficient advertising spend with traditional outdoor advertising.

M states that the idea of progress did not include increasing mechanisation and technologization for Japan in the past. That justifies why even nowadays ATM cards are for secondary use, why withdrawing cash from ATMs is expensive and only possible during restricted hours, and why many establishments do not accept payments with cash. In fact, V also refers that it is not easy for his company to stablish partnerships with other small businesses, because their owners do not know a lot about technology and social media trends. He mentions, however, that they are found of giving paper coupons for discounts.

To market a product or service in Japan, companies must have salesmen, according to V. Big companies, instead of searching for information themselves, always wait for people who have the solutions they need to come to them, which would be salesmen. This contact must be face-to-face, as is usually expected. V also notes that printed business cards as a formal means of presentation are still very important in Japanese culture, therefore they cannot be replaced by websites, social media accounts or online curriculums.

Portugal being a Western country, digitization happens in a faster pace. As referred by S, even smaller companies worked hard to migrate their marketing to digital channels and strengthen their digital presence. Whereas digital worked as an aid to offline tools at first, eventually digital marketing strategies became as important as traditional ones. S believes that “offline projects, despite having a lower gross margin, are those with a very high sales value. Online projects, however, are low value but have a high margin”. An example would be discount systems. For S’s marketing agency, it no longer makes sense to create physical discount cards for its audience. Instead, the agency started to provide discounts through a chatbot. They considered to create an app from scratch, but ended up using Facebook Messenger instead, because of its popularity among the target and because it allows interaction with other brands. When it comes to doing sales, S defends that they can benefit more from face-to-face relationships created between salesmen and clients, but he believes that commercial relationships created online can also work, even if they are not so easily established.


Overall, S is certain that traditional marketing will never go extinct, but that there is indeed a constant need to adapt its strategies like in digital marketing. However, he believes that the pace of adaptation of digital marketing itself is too fast, while the pace of adaptation of traditional marketing is much more consistent in the industry. Comparatively, K recommends that Portuguese companies do not look up to Japanese companies as a valuable example of what do in digital marketing.

K ensures that Japanese customers are buying online, even if Japanese companies do not yet take as much advantage from it as they should. In fact, G mentions that Ecco decided that it would be important to invest in e-commerce when they entered Japan, considering that other brands in the country were doing it as well. However, K characterizes the Japanese online customer journey as quite fragmented, describing it as “information chaos”. They tend not to make a purchase directly through a social network’s feed, but instead they go directly to the website. Customer behaviour will be explored in the following section.

M mentions that Japanese customers, in general, have a more conservative attitude towards e-commerce than Portuguese customers. Large websites and shopping platforms find it difficult to succeed in Japan. She mentions that the case of Amazon is an exception, as it is such a large platform, that has won so much market share, that the Japanese trust it. The payment method itself on Amazon in Japan is different from the rest of the world,

providing customers with more security. Figure 1 shows that a “Convenience store / ATM / Internet banking / e-Money payment” payment option is available for Japanese customers.

Select a payment method

 Enter how you'd like to pay below, and we'll save it as an option.

Other Payment Options

COD Not available. [Why?](#)


Convenience store / ATM / Internet banking / e-Money payment This payment method is only available in Japan. You will be asked to pay before we ship your items. The Pay ID will be issued after we start shipping preparation. After issued, you can check your Pay ID in Your Order page. Please read our [click here](#) page before you choose this payment method.

More Payment Options

Credit Cards

Amazon accepts all major credit cards:

[Add a new card](#)



Mobile Carrier Billing

Pay with a mobile carrier billing account. For details please see [here](#).

[Add a new account](#)




Figure 1 – Amazon Japan’s payment method. Retrieved from ‘amazon.co.jp’.

M believes that there is a greater preponderance or a more pronounced level of the need for direct contact between buyer and seller in Japan, compared to Europe. Therefore, companies that want to conquer the digital market must have different strategies from those they have in the western market. M also reminds that Japanese e-commerce companies often must appeal to a younger age group, because it is very difficult to appeal digital commerce to customers aged 45-50+ in Japan.

5 Culture and customer behaviour towards digital marketing strategies

Because culture explains why some products sell well in certain regions or among specific groups, but not as well elsewhere, it is an important factor to analyse when it comes to online customer behaviour. After all, a marketing strategy in one country might be effective or ineffective to members of another culture.

As supported by K and V, Japan is far behind in digital development compared to the West due to cultural factors, including its inherent hierarchical system. Japanese society is culturally ruled by hierarchical norms, and business is no different. Because of that, common top-level management in companies are usually older people and it is hard for younger employees to change how things are done, play an active role in corporate decisions, or say anything in opposition to their superiors or even colleagues. As stated in the previous section, reluctance to change is also rooted in the culture of Japanese society, which prejudices development in business and adaptation to digital marketing strategies. K highlights that there is a general risk diversion on the part of Japanese people when it comes to new things, as making mistakes is not forgivable in Japanese society, especially for a client.

M contributes to this statement, explaining that by being a pyramidally structured society regarding hierarchy, Japan's level of communication is top-down. She adds that this social pressure of following the norm and being included in a social circle has made advertising ubiquitous in Japan, almost as a way of making sure that one is a participative and efficient human being in society. Someone who refuses to consume a certain product when he is expected to or refuses to join others in an act of consumption, is seen as "not perfectly civilised".

In Japan, on-site work and face-to-face meetings are usually considered a necessity. K informs that traditionally most Japanese business happens offline. He emphasises the importance of *nomikai* – the Japanese drinking culture in business. Drinking with colleagues in Japan helps to unwind the formal behaviour which results from the culture. Engaging in these informal gatherings is socially essential for career progression and relationships at work. And so, the efficacy of an agency or the ability to deliver results matters far less than the interpersonal relationships of the people who are doing the buying and selling decisions. K states that therefore permanent remote work is not well accepted

in Japan. V has the same opinion, claiming that he could only get the funds that he needed from investors in order to create his company because he attended several start-up events in Tokyo. Meeting other entrepreneurs face-to-face and getting information about investments from them, with whom he had to market his business idea consistently, was crucial for its creation. V also states that if he was not physically in Japan, he would not be able to start his business.

In Portugal, the perception of value of face-to-face meetings differs considerably. S states that a face-to-face meeting builds a relationship between the participants that may be valuable over time, due to the existence of physical contact. He believes that body language allows people to establish trust and break down barriers, which is hardly possible in an online meeting. However, S also considers that building that trust in an online meeting may be possible if there is interest from both sides.

K believes that “there is a disconnection in Japan between how people are planning and doing their marketing, and how customers are behaving”. Japanese marketers invest a lot in traditional media, but their target spends a lot of time on their phones. As stated in the previous section, K also mentions that if marketers in Japan do not do attribution analysis, they will not understand how customers behave and how they bounce around a lot to different platforms. He believes that online customer journey in Japan is quite hard to map, compared to western online customer journeys, because Japanese customers will hardly buy a product only because they are retargeted from an advertisement they had seen. It is not easy to draw a causal relationship between them seeing an advertisement and making a purchase, because they take other actions in the middle of that process.

M ensures that because of cultural differences, Japanese and Portuguese customers are deeply different. Trends influence Japanese customers tremendously and as a society, they have had well-established consumer trends over the last few decades. She adds that seasons influence them even more, since specific products and behaviours in Japan are associated to the time of the year that they are currently going through. In fact, the more the edition of the product is limited and the more it is associated with a season, the greater the success of that product will tend to be. However, M believes that this customer behaviour associated to seasons does not exist as much in Portugal, and that while it has become a marketing strategy in Japan, the western consumer has become detached from the idea of seasonality of products.

Also, M states that anything that Japanese people use in their daily lives has got the potential to be marketed and merchandised, making it an adverse trend to that of Portugal. An example are the characters from Line (a Japanese social network that will be explored in the following section), which spawned the creation of a huge shop that sells all the merchandising of these characters. Japan is a market that favours creating something like what already exists. M gives the example of *obento* boxes, which are boxes that Japanese people use to carry their homemade meals, saying that “a company that creates *obento* boxes will always be successful in Japan, because everyone uses them and as they break, they will always have to be replaced”. In a nutshell, M defends that while in Portugal what reaches certain levels of popularity is what is considered exceptional, in Japan what reaches certain levels of popularity is what it is part of daily life. She believes that the collectivist mentality of the Japanese opposes to the individualistic mentality of the Portuguese, and that is the main difference between customer behaviour in Japan and in Portugal. Also, M mentions that while the Japanese customer is used to being very respected and “almost divinised” (which requires a “white-glove service”, according to K), in Portugal it is very common for customers to be treated “almost like a hindrance”.

When it comes to purchase choices regarding digital, V and M agree that Apple is the most popular brand for digital devices and telecommunications in Japan. Most Japanese customers own iPhones, which according to V can be evidenced when online traffic on websites is analysed. M attributes this fact to the “first-come, first-served” phenomenon immanent to Apple, since being the first brand to penetrate the market and release a new type of product has got an enormous impact in Japan, providing the brand with a certain seniority. As stated by M and K, smartphones (mostly iPhones) are the most used digital devices in Japan, followed by laptops (mostly MacBooks). Tablets and desktop computers are not as popular, but most people who own them usually have iPads and iMacs respectively. The table shown in figure 2, translated to English by Patently Apple (*Apple Is Listed as Top Brand in Japan for the Third Consecutive Year Beating Out Google, Sony, Microsoft & Others*, 2021), shows the results of Nikkei Research’s 2021 “Brand Strategy Survey” on how customers and business professionals in Japan evaluate brands (*Apple Has Become the Most Acclaimed Brand in Japan for 3 Consecutive Years*, 2021), proving that Apple Japan has topped the list for three consecutive years and surpassed brands such as Google and Microsoft. The original table, published in Chinese by Nikkei Chinese Net, can be found in attachment XIV.

2021: Top 10 Brands in Japan

企业品牌综合排行榜			
综合排名 (上年)	企业名或品牌名	评价排名	
		消费者	商务人士
1(1)	苹果日本	9	1
2(5)	谷歌	1	5
3(1)	索尼集团	7	3
4(3)	雅玛多运输	3	4
5(4)	微软日本	24	2
6(6)	松下	15	7
7(13)	东陶	11	16
8(7)	丘比	2	52
9(14)	丰田汽车	50	9
9(20)	佳能	70	5

- Apple Japan
- Google
- Sony Group
- Yamato Transport
- Microsoft Japan
- Matsushita
- Toto
- Chubby
- Toyota Automotive
- Canon

Figure 2 – Translated table showing the results of 2021’s “Brand Strategy Survey” in Japan. Retrieved from ‘Patently Apple’.

Whereas a lot of Japanese people do not even own a personal computer, the same cannot be said about the Portuguese, according to S’s stats from Rede. However, people in Portugal use smartphones more than laptops. Like the Japanese, S believes that only a small portion of Portuguese users own tablets. Attachments III and X, mentioned in chapter I, corroborate this data.

As explained by V and S, since smartphones are the most used digital devices in Japan and Portugal, website builders from both countries usually make sure that websites are optimised to mobile, even though desktop is always considered as well. S himself assumes that he always checks if Rede’s contents work well in mobile. As for search engines, K highlights that both Google and Yahoo! are the most used ones in Japan, therefore he warns that marketers should know what they rank on both platforms.

K states that Japanese society tends to distrust anything that does not have a physical component to it, making online privacy highly valued in Japan. Users believe that anyone can write anything online and that therefore there is nobody responsible for vetting the information, hence it is very hard to trust anything online. People pay attention to digital guaranteed, but there's distrust of it. According to M and supported by V, Japanese users tend not to create online profiles that identify them in Japan, not least because there can even be negative consequences from an employer's point of view - finding out their personal profile, their likes, the forums where they express their opinions, among other information. People also avoid posting pictures of their faces on the internet, as they prefer to share their work, their hobbies, food or places they visit instead.

M explains that the Japanese are more protective of their private lives because there is much more of a perception that expressing an opinion, or even showing that they are a consumer of a certain product, might not be well regarded. So, there is a concern to preserve privacy, in a perspective of making social interactions easier and not creating areas of friction. This is seen across Japanese culture, and it also manifests in customer attitudes and online behaviour. M adds that one thing that happens a lot in Portugal is people showing on social media what they buy, where they buy it and how much they paid for it. That does not happen so much in Japan, as there it is not considered elegant or in good taste, or it might hurt sensibilities. M stresses that, in this sense, customer behaviour is also very different. In fact, social media usage in Japan is something that people ponder a lot, like in any other social interaction. In Portugal, however, situations such as dependence on social networks, or oversharing of social networks, are much more of a reality. M considers that social networks, as they are used in the West, rely heavily on the egocentric algorithm. And the egocentric algorithm doesn't work in Japan because drawing attention to oneself is frowned upon in society. G proves this by giving the example of Ecco, which has already invited social media influencers and bloggers to promote the brand in Portugal but has never done so in Japan.

6 Communication as a digital marketing strategy

Business communication is necessary for marketing strategies. When it comes to digital, communication has a distinct role in diverse tasks, such as finding growth prospects, launching online campaigns, increasing sales, branding, and engaging in social media.

6.1 Media

While the Japanese society will not openly trust in digital media and online content, K states that their trust is focused on legacy media, even though it has been dwindling. Television and newspapers “occupy the top echelon of trust, because they act as a quasi-arbitrator of fact”, denoting the power similar to those of a judge. While the West engaged in clickbait journalism and lowered editorial standards, K guarantees that the same never happened in Japan. Because of that, the Japanese are careful in their approach to what they write.

K mentions that as a Japanese marketer’s value, television, print magazines and newspapers are a “gold standard” in advertising. There is a lot of media coverage and advertorials on those media, and there are stringent standards even in advertorials. V adds that Japanese commercials on television are “very unique” and suggests that they would be successful if they were distributed in the West, due to their creativity. An American advertising campaign from 2011 for Toyota Corolla, featuring the Japanese virtual idol Hatsune Miku, corroborates V’s suggestion as it won a Multicultural Excellence Award at the Association of National Advertisers’ annual Multicultural Marketing & Diversity Conference in the Digital Media category (*Scott’s, Target, Ford Score ANA Multicultural Excellence Awards*, 2011). The screenshot in figure 3 illustrates one of the ads of said campaign. K also highlights the massive distribution of flyers, as well as the massive presence of billboards in the streets of big cities like Tokyo. G agrees with this statement, mentioning that recently Ecco used billboards in Japanese metro stations as a branding strategy, while in Portugal the company rarely invests in that that means of communication. M goes further and while she also emphasizes the power of billboards in Japanese public transports, she also mentions that “anything that you can see, hear, smell, taste, or remember as you make your way home from school or work every day, is going to impact Japanese people a lot, and therefore public transportation is a big advertising

hub in Japan”. The screenshot in figure 4 illustrates some billboards from Akihabara’s metro station in Tokyo.



Figure 3 – Toyota’s U.S. Hatsune Miku ad. Retrieved from ‘Yami Sweet’'s YouTube channel.

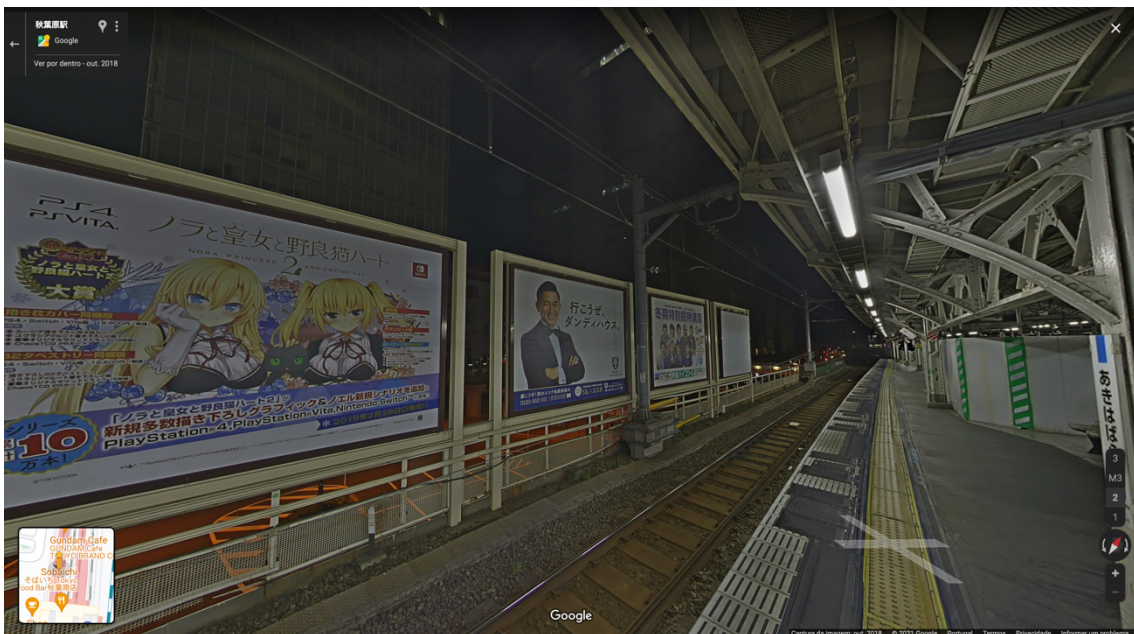


Figure 4 – Billboards in Akihabara’s metro station. Retrieved from Google Street View.

Regarding social media, V declares that while Instagram, TikTok and Twitter are very popular social networks among young Japanese, Facebook works more as a business tool for older people. M confirms this statement by saying that Facebook is the preferred social network for the older generation in both Japan and Portugal, which is corroborated by S who confirms that Facebook is very important to the Portuguese senior target, to the point where most of senior users consider it as a synonym of internet.

K complements the information provided by V about the relationship between Japanese young people and social media. He declares that Twitter is the only place in the whole world where their active user population is bigger than Facebook or Instagram, and yet “its ad platform is lacking”. He adds that TikTok is “growing incredibly fast”, but he only sees game companies using it for digital marketing.

V, K and M explain that Line, a Japanese social network, works similarly to Messenger and WhatsApp, even though it has its own feed. Japanese people tend to use Line for most of their text messages and voice calls, but Line is also used for other things that are usually used in other social networks in Portugal, according to M. She mentions “governmental functions” as an example, which in Portugal are typically applied through Facebook and Instagram, but in Japan are applied through Line.

According to M, because being a consumer and an influencer in Japan is always very much linked to the position one has already acquired in society, brands try to captivate people who already have a certain relevance in other artistic media, such as television, cinema, or music, to work as their social media influencers. Therefore, the concept of social media influencers in Japan is quite distinctive from the Portuguese one, which relies on egocentrism like it was stated in the previous section.

When it comes to chatbots, K mentions that they are not very common in Japan. Since Japanese people expect a very high degree of customer service, as it was also mentioned in the previous section, K believes that it might be counterproductive for brands to have a chatbot, negatively affecting their customer experience. According to a study by Naomi Aoki from the University of Tokyo, public trust in chatbot responses from Japanese users depends on the field in which they are used (Aoki, 2020). Contrarily, S believes that chatbots are “the next step” in Portugal, as older people usually do not yet comprehend how an automatic response system work, but younger people are already familiarized with it.

6.2 Content

According to K, language is one of the main reasons why the Japanese are far behind in digital marketing when compared to the West. V confirms this statement by mentioning that if Japanese people used services which are available in English, like Western countries do, companies would save a considerable amount of money. They would not need to pay for the costs of adapting them the Japanese language, or they could even use services that exist for free in English. However, most of the Japanese population does not know English and is restricted to their own language even in business. V believes that this is not sustainable for the economy in the long term, and that if Japan continues to work that way, it will be left behind comparatively to other countries.

Moreover, V adds that the lack of English proficiency in Japan also makes good opportunities in business. By translating existing goods from English to Japanese, new products or services localized for Japan can be created. Teaching new knowledge in Japanese that was only available in English before also represents a business opportunity. K notes that the demand for English and Japanese bilinguals in Japan, namely for marketing-related tasks, is huge. Because of globalization, Japanese companies lack workers who can communicate and do business on an international scale. K also mentions that the language barrier highly jeopardizes the speed with which new knowledge is learned in Japan, resulting in missed opportunities in digital marketing, since that “by the time that all trickles down, the first movers’ opportunity is long gone, and the market thing becomes saturated”. He regrets that because the know-how takes a long time to come into the market, a lot of people are still working with outdated models.

M highlights that for them to be successful or effective, all content in Japan must not only be in Japanese, but in an adequate Japanese to the brand’s target. The Japanese language possesses multiple levels of formality, as well as very large differences in genders and age groups. Since the Japanese customer is used to being very respected, the same norms apply to language and how online content is communicated. Because of that, M recalls that while marketing in Portugal, which is guided by a western advertising logic, favours reaching the largest number of audiences at the same time, Japan favours marketing that works for a niche audience.

In addition to language, design also distinguishes content in Japan and Portugal. While V praises the quality of design in Japanese printed materials, he points out the bad quality

of design in Japanese websites. K agrees with this opinion and justifies it by pointing out that there are a lot of poorly designed websites, and the reason relates to a lack of respect for things online by older management, or a lack of willing to invest money into something that is very hard to quantify from a business perspective.

K declares that what works for a Japanese audience and what works for a non-Japanese audience is very different, including design. He gives the example of Ebay, which failed in Japan probably because its interface was “too clean”, leaving Japanese users with the impression that what they were looking for could not be found there. A screenshot from the Japanese Ebay website as illustrated in figure 5. Rakuten, in contrast, is akin to what Japanese people are used to when it comes to flyer designs. Its interface causes an overwhelming sensory stimulation, giving people the idea that there is so much information that they can find what they want there. The screenshot in figure 6 illustrates Rakuten Ichiba’s Japanese website, which contains some visual features such as small low-quality images, a dense and tightly packed text, flashing banners and colours, a high number of columns, and the old technology Flash.



Figure 5 – Japanese Ebay interface. Retrieved from 'ebay.co.jp'.



Figure 6 – Rakuten Ichiba’s Japanese interface. Retrieved from ‘rakuten.co.jp’.

V supports this statement, mentioning that Japanese media, both online and offline, usually contains a lot of colours and “screaming information”. K also exemplifies with the Japanese and the English versions of Audi’s website in the past, in which the Japanese one had a completely different visual, with a much bigger amount of text (more specific information about the products) that took up a lot more room than the information on the English side. The English version had a very large, “impressive” visual, whereas the Japanese was around half the size of that visual and accompanied of text for infill. K believes that while that would be considered a bad, “crappy” design for western customers, it works for Japanese customers because they want to see more information. The screenshots illustrated on figures 7 and 8 show the Japanese and the English versions of Audi’s website in 2011.



Figure 7 – Japanese version of Audi’s website on 18.10.2011. Retrieved from ‘Internet Archive’.

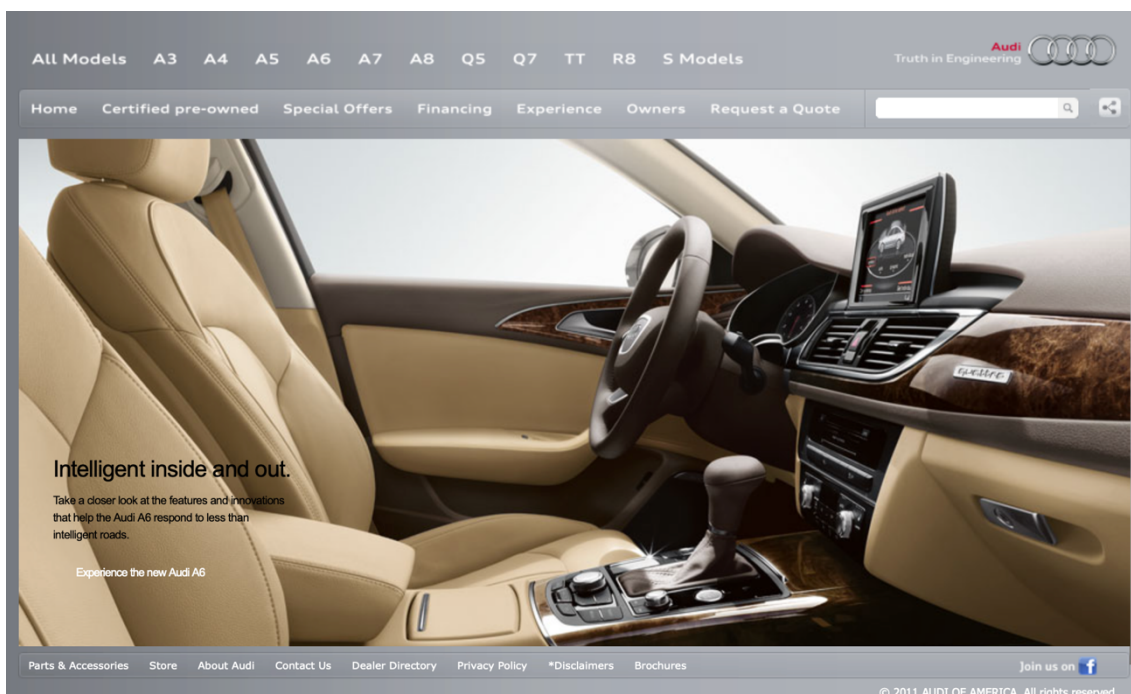


Figure 8 – English version of Audi’s website on 11.10.2011. Retrieved from ‘Internet Archive’.

G, who took some time to personally compare Ecco's Japanese and Portuguese versions of the website, draws attention to the fact that the Japanese version has "a lot more of text with small print and product-specific information" and "different colour palettes in product highlights". Differences in the management of page space in terms of the amount of text and image, as well as in colour palettes, can be seen in screenshots from the homepages of Ecco's Japanese and Portuguese website, shown in figures 9 and 10. Differences in the amounts of product-specific information can be seen in screenshots of the web page of a product from each country, shown in figures 11 and 12. Differences in the amounts of text can be seen in screenshots from the bottom of the Japanese and the Portuguese versions of Ecco's website, shown in figures 13 and 14. Figures 15 to 18 compare the Instagram feeds and publications from Ecco Japan (@eccojapan) and Ecco's global account (@eccoshoes, also directed towards the Portuguese audience), respectively. Differences in the levels of formality of communication are visible in different aspects, such as:

- The global profile has a biography with shorter sentences, more paragraphs, and the presence of an emoji. The Japanese profile has only text.
- The Japanese profile does not use highlights from Stories, unlike the global profile.
- The global profile's post descriptions use paragraph spaces, emojis and hashtags, unlike the Japanese profile's posts.

K warns that these nuances make it very hard for any professionals with a western-only mindset to make any sort of real design decisions, unless they see how a Japanese user interacts with it. He adds that user interface (UI) and user experience (UX) are not very valued in Japan, as Japanese professionals do not think deeply about how changes in web design could lead to efficiency and therefore profit, thus there is not an urge of "fixing" design choices.

From his Portuguese perspective, S declares that Rede's website interface is well designed – "a website designed from scratch, which still needs some improvement, but can generally provide good navigation for the user". Since Rede does not specialize on user interface and experience, they have outsourced a programming agency for the creation of their website. S believes that the right design can be a determining factor in a company's success.



Figure 9 – Homepage of Ecco’s Japanese website.

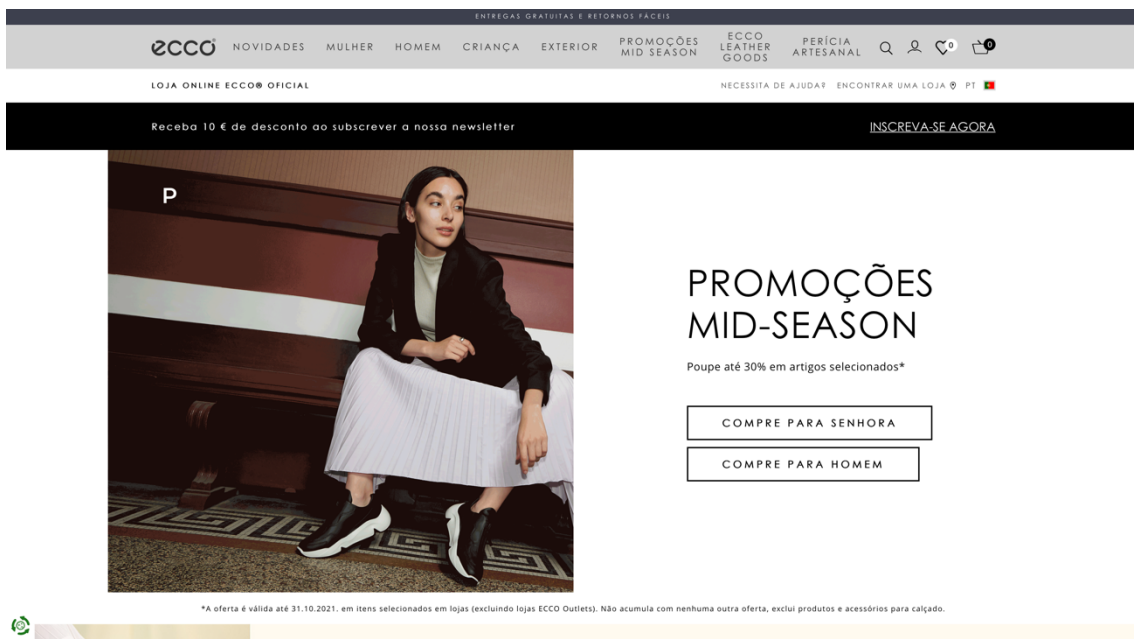


Figure 10 – Homepage of Ecco’s Portuguese website.



Figure 11 – Web page of a product on Ecco’s Japanese website.

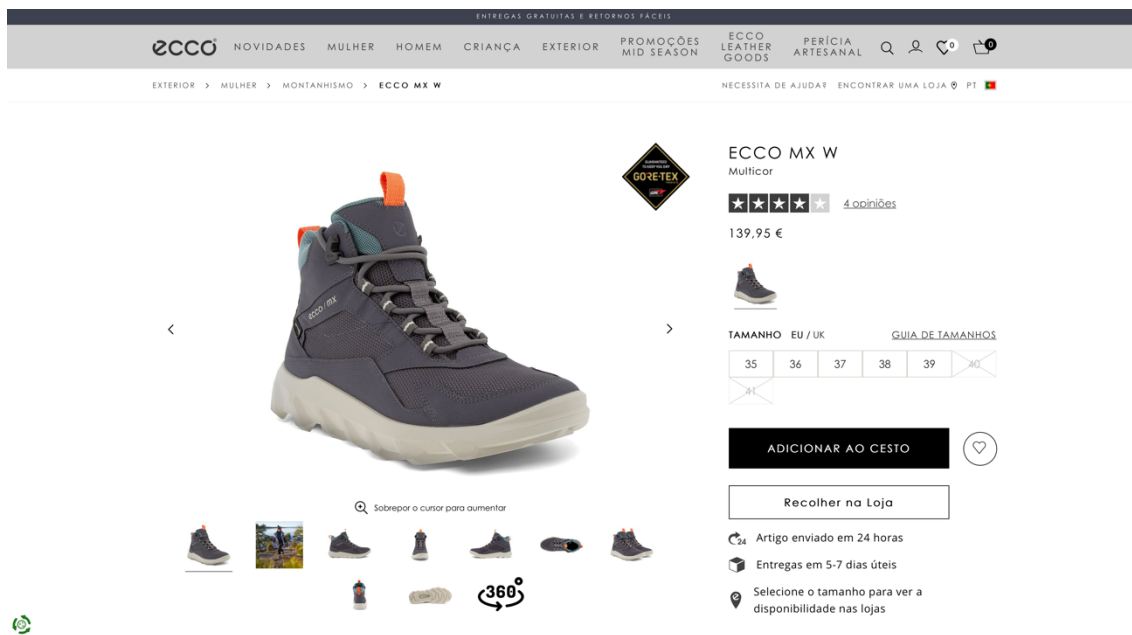


Figure 12 – Web page of a product on Ecco’s Portuguese website.



Figure 13 – Bottom of the Japanese version of Ecco’s website.

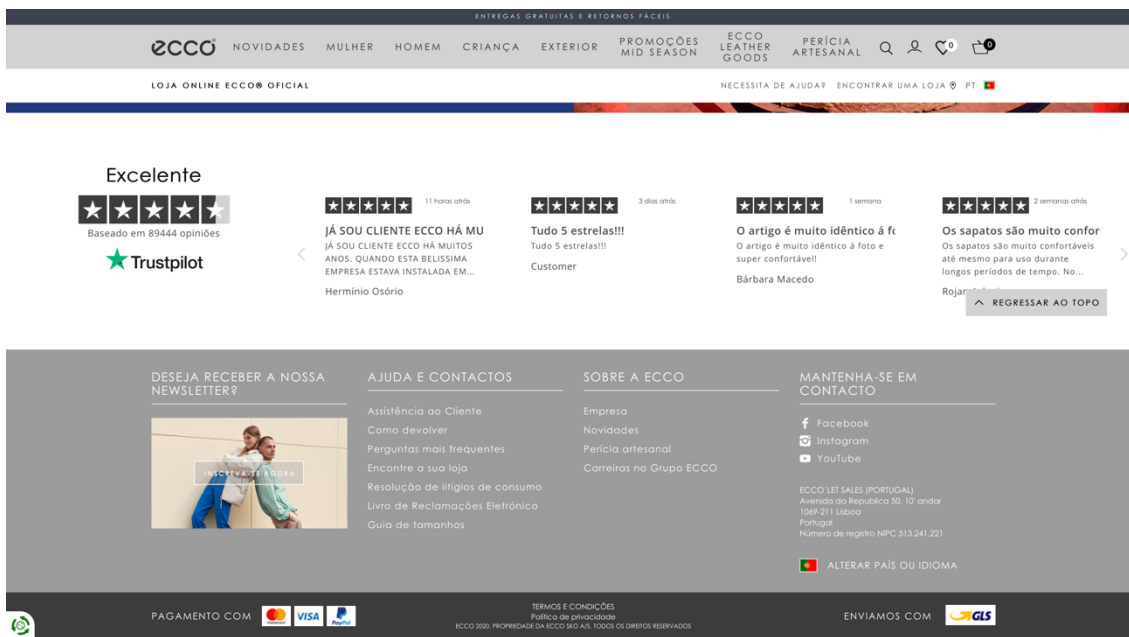


Figure 14 – Bottom of the Portuguese version of Ecco’s website.

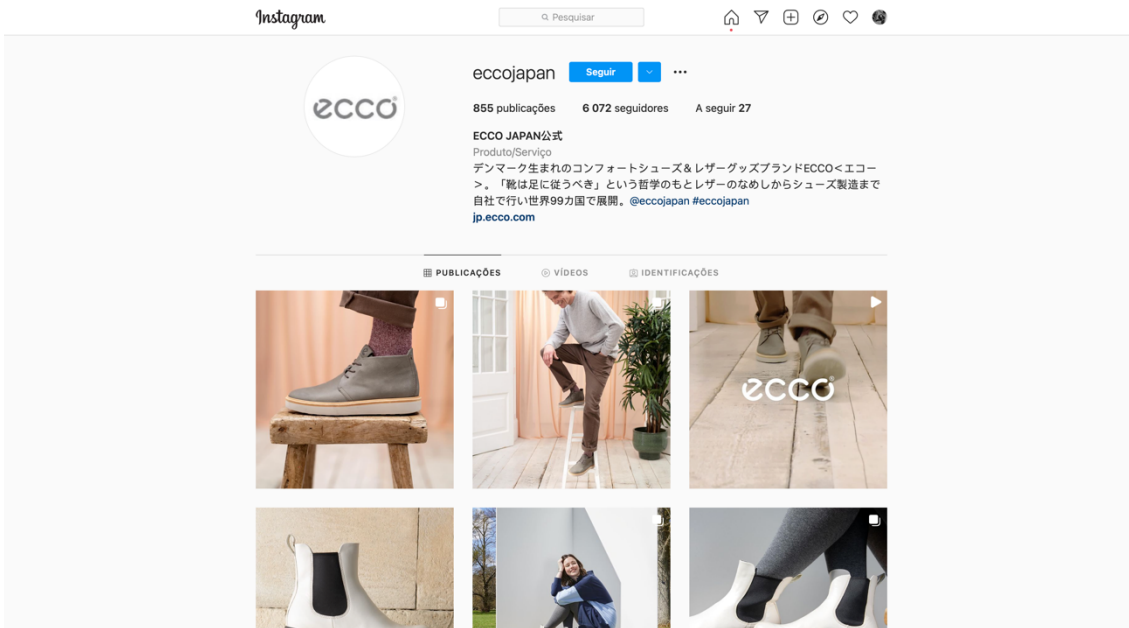


Figure 15 – Ecco Japan’s Instagram feed.

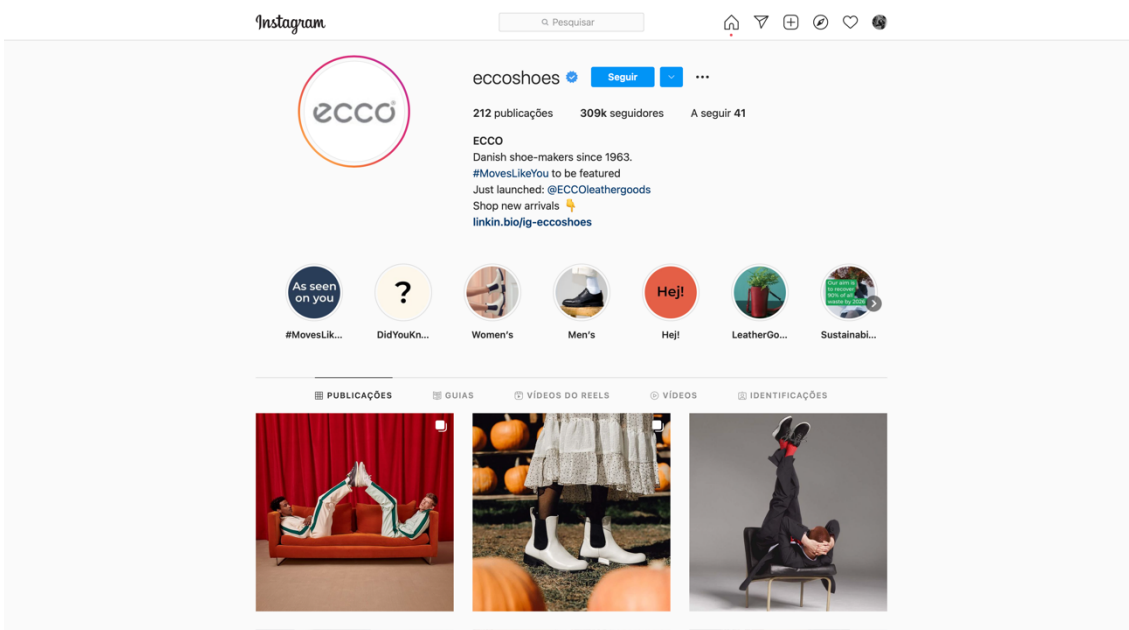


Figure 16 – Ecco Global’s Instagram feed.

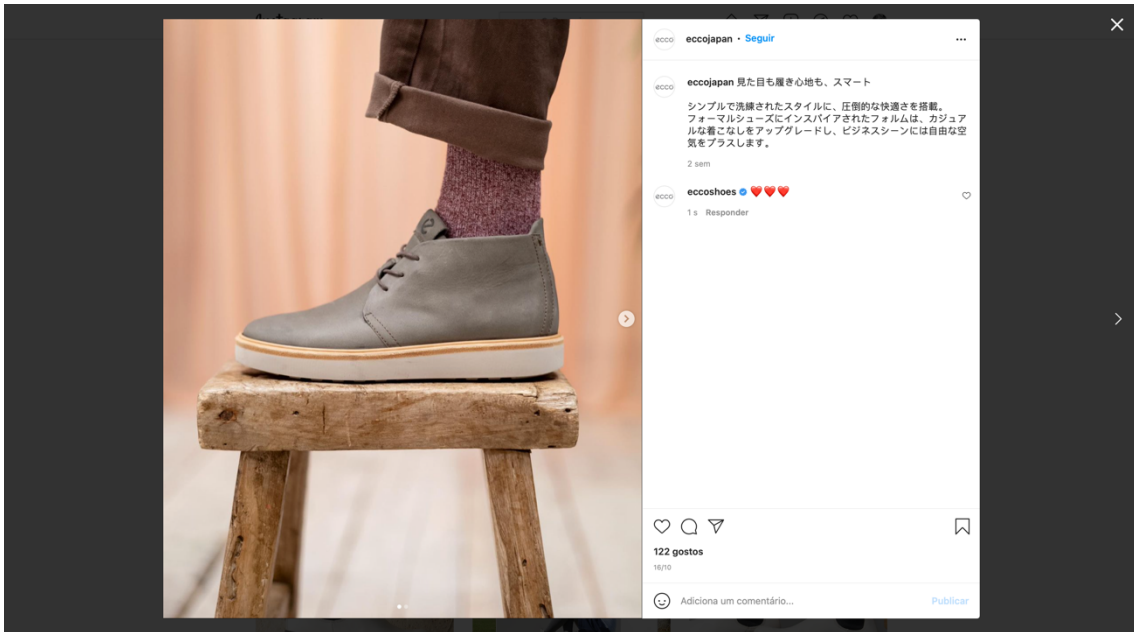


Figure 17 – Ecco Japan's Instagram post.

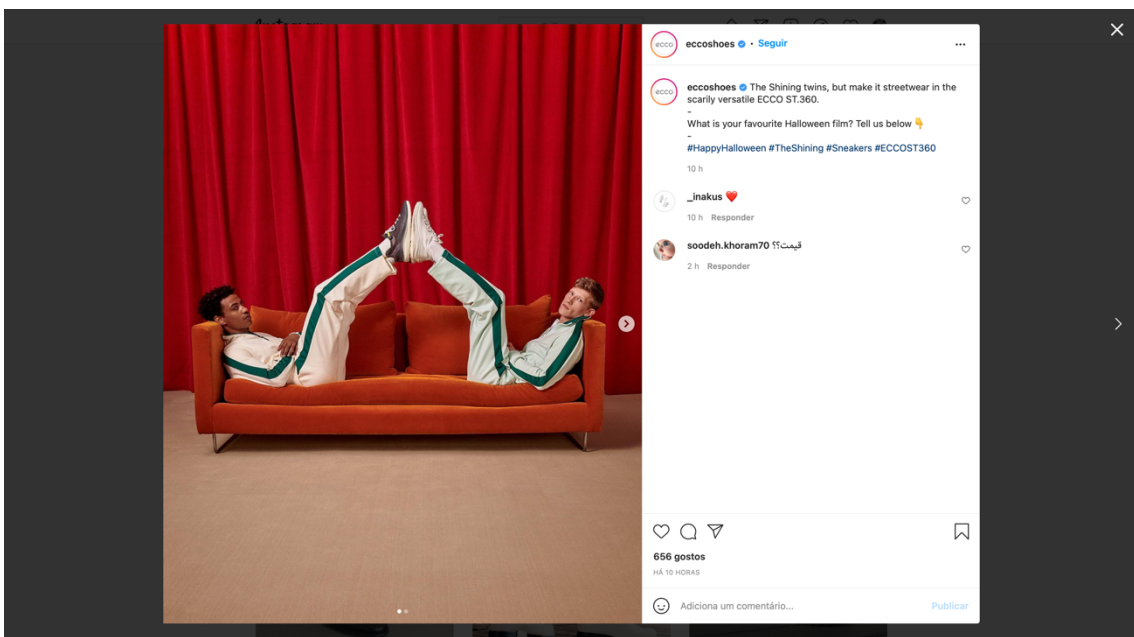


Figure 18 – Ecco Global's Instagram post.

CHAPTER III – FINAL CONSIDERATIONS

7 Discussion of results

By comparing the results analysis from the conducted interviews on chapter II with the literature review from chapter I, we can find corroborative or contrary evidence to the literature initially analysed.

Kyle (2021) and Kotler & Keller (2016) state that to fully integrate their marketing strategies, companies must also develop digital marketing strategies, which meets with the demand of digital marketing that exists in Japan and Portugal, as mentioned by G, K, S and M respectively. However, Neely (2017) admits that business digitization and thus the adoption of digital marketing strategies and skills have been a slow process for the Japanese industry, corroborating K, M and V's points of view about digital and digital marketing in Japan. While S is worried that digitization in Portugal has been happening too fast, Ferreira (2018) is aware that "there is still a way to go for national companies when it comes to digital transformation". Bandeira (2019) adds to Ferreira (2018)'s opinion by informing that more than half of Portuguese companies do not have an adequate online presence.

When it comes to online habits, the search for privacy from Japanese users, which is also discussed by K, M and V, is confirmed by Taskila (2019). Their demand for an excellent customer service, mentioned by K and M, meets Usui (2014)'s statements. He also talks about the hierarchical structure by which Japanese culture and business are governed, resulting in an increased difficulty for Japanese companies to adapt to digital as K, M and V confirmed, proving K's belief that "there is a disconnection in Japan between how people are planning and doing their marketing, and how customers are behaving".

Takahashi (2019) agrees with K, M and V when he says that cultural factors have a major impact on Japanese customer behaviour. In fact, Miura (2014) highlights that the Japanese tend to be oriented to new trends and are strongly influenced by other's behaviour when it comes to purchasing decisions, corroborating the information provided by M.

In fact, marketing strategies in Japan might be peculiar. For instance, both Occhi (2020) and M are aware that cartoon characters are a powerful marketing tool for advertising in Japan, namely in social media, agreeing that they are very common and contribute to brand popularity. That does not necessarily mean that they would work in Portugal. For instance, while V believes that creative video commercials like the ones made in Japan

could work of applied in western countries, Darusalam & Tawami (2019) does not share his opinion.

Rönkkö (2014) defends that digital marketing strategies in Japan should be specifically targeted to Japanese customers, considering their specific requirements and preferences in language and design, thus supplementing M's opinion about language and K's perspective on design for online communication. Ito & Gehrt (2020) also mention that "marketing content needs to be managed accordingly to the Japanese culture and linguistic features". From a Portuguese perspective, Sebastião et al. (2012) agree with S when it comes to the value of visually attractive websites, but he also understands that results are only generated if the online presence of the brand is good.

Regarding social media, M and S believe that while Facebook is the most used social network by older Portuguese users, Instagram is also very popular, especially among younger people. However, even though Passerini (2019) agrees with the power of Facebook in Portugal, he believes that social media marketing in Portugal does not focus a lot on Instagram. Even so, Figueiredo et al. (2019) agree with M and S when they mention that social media usage depends heavily on the age of the user.

Rönkkö (2014) declares that Japanese are the world's higher spenders on mobile apps, with Japan having a high smartphone penetration rate, and that it is necessary for companies and brands to consider smartphone optimization. Once again, this meets with K, M and V statements about smartphone use in Japan, as well as the states previously mentioned in chapter II. The high smartphone usage and the importance of mobile optimization in Portugal, referred by S, are also corroborated by Borges (2019). Both Borges (2019) and S, supported by G and M, also note the growth of e-commerce in Portugal in recent years.

Just as T. C. de Oliveira (2015), who is confident that increasing sales in Portuguese companies does not only depend on the digital marketing communication tools that are used, but also on their usage in conjunction with traditional tools, S believes that traditional marketing "will never go extinct".

Table 6 highlights the most relevant topics from our discussion of results.

Authors		Summary statement	Interviewees			
Kotler & Keller (2016)	Kyle (2021)	There is a demand of digital marketing in the market.	G	K	S	M
Neely (2017)		The adoption of digital marketing strategies and skills has been a slow process for the Japanese industry.	K	M	V	
Bandeira (2019)	Ferreira (2018)	Digitization in Portugal has been happening too fast.	S			
Taskila (2019)		Japanese users look for online privacy.	K	M	V	
Usui (2014)		Japanese customers demand for an excellent customer service.	K		M	
Usui (2014)		The hierarchical structure which governs Japanese culture and business results in an increased difficulty for Japanese companies to adapt to digital.	K	M	V	
Usui		There is a disconnection in Japan between how people are planning and doing their marketing, and how customers are behaving.	K			
Miura (2014)	Takahashi (2019)	Cultural factors have a major impact on Japanese customer behaviour.	K	M	V	
Occhi (2020)		Cartoon characters are a powerful marketing tool for advertising in Japan.	M			

Darusalam & Tawami (2019)		Creative video commercials like the ones made in Japan could work of applied in western countries.	V			
Ito & Gehrt (2020)	Rönkkö (2014)	Digital marketing strategies in Japan should be specifically targeted to Japanese customers, considering their specific requirements in language.	G		M	
Rönkkö (2014)		Digital marketing strategies in Japan should specifically consider Japanese customer's specific preferences in design.	G		K	
Sebastião et al. (2015)		Visually attractive websites are valuable for the Portuguese market.	S			
Passerini (2019)		Facebook is the most used social network by older Portuguese users.	M		S	
Passerini (2019)		Instagram is very popular in Portugal among younger people.	M		S	
Figueiredo et al. (2019)		Social media usage in Portugal depends heavily on the age of the user.	M		S	
Borges (2019)	Rönkkö (2014)	It is necessary for companies and brands to consider smartphone optimization.	K	M	S	V
Borges (2019)		E-commerce has grown in Portugal in recent years.	G	M		S
T. C. de Oliveira (2015)		Increasing sales in Portuguese companies depends on both digital and traditional marketing.	S			

Table 6 – Relevant topics from the discussion of results.

The meanings of each colour on table 6 are as follows:

- green: “agrees with the statement”
- orange: “does not agree with the statement”
- purple: “related to both Japan and Portugal”
- yellow: “only related to Japan”
- blue: “only related to Portugal”

8 Conclusions

By connecting all the data, we can answer our specific research questions from the beginning of our study.

- **“How do Japan and Portugal respond to digitization in marketing?”**

Japan has a slow digitization process in marketing, due to cultural factors that constrain the overall digital development of the industry. The value of tradition and customs is very strong in Japanese culture, and older people who are less open to change tend to be in positions with greater decision-making power. Therefore, it is more difficult to achieve modernisation in the industry, particularly when it comes to digital marketing. Japanese marketing professionals lack skills and understanding of digital, and new knowledge acquired in other parts of the world arrives late to Japan due to the language barrier that the Japanese have with the English language. Portuguese companies and marketing professionals are quicker to learn and internalize digitization. Change, modernization, and adaptation are often encouraged in Portuguese business culture. However, there is yet a high number of companies in Portugal which do not have a good online presence. It is also common for smaller companies to face a lack of qualified workers in digital marketing.

- **“How do Japanese and Portuguese customers behave online?”**

Overall, both Japanese and Portuguese spend a lot of time on the Internet, preferably through their smartphones. Social media is very powerful in both countries and users are buying online. However, Japanese users tend to prioritize their online privacy a lot more than Portuguese users, due to the cultural tendency of not to stand out from the crowd and share their personal lives, as well as fear of affecting their public image or professional lives. Portuguese social media users and digital influencers are governed by a principle of egocentrism, while the Japanese are governed by group harmony and a preference for what is part of everyday life. Also, online customer behaviour differs from one country to another. While it is easier to retarget Portuguese online customers from an advertisement to a purchase, Japanese online customers tend to search for more information and take a more thoughtful decision between seeing an advertisement and making a purchase.

- **“How do Japanese and Portuguese companies communicate online with customers?”**

While Portuguese companies are allowed to be more flexible in their customer service or in the language they use with customers, alternating between different levels of formality depending on their type of audience, Japanese companies should prime for maximum respect to their customers at all costs as it is always expected an excellent customer service. The Japanese language varies deeply depending on factors like the age and the gender of the person who is being talked to, therefore Japanese companies must take that into consideration as well. For these reasons, automatic responses from chatbots are expected to be more successful in Portugal than in Japan.

- **“How do Japanese and Portuguese companies create advertising materials for online dissemination, and how do they differ for different audiences?”**

Besides the different levels of caution in the language, there are significant visual differences in what Japanese and Portuguese customers are expecting from online advertising. Japanese materials tend to have a greater clash of colours and a greater amount of text and technical information. Cartoon characters are also

common in many types of publicity in Japan, namely online. Good usability of web pages and intuitive interfaces is a greater concern in Portugal than in Japan.

Finally, we can formulate a broad answer to our main research question.

- **“What are the differences and similarities in Japanese and Portuguese digital marketing strategies?”**

Overall, digital marketing strategies in Japan and Portugal differ due to differences in culture. Japanese companies are not as aware of the potential of digital marketing in sales as the Portuguese. They lack knowledge and skills in digital, and are reluctant to change, which puts them lagging other countries in marketing. The lack of proficiency in English undermines Japan’s globalisation options. Social media usage benefits from egocentrism in Portugal, while in Japan it benefits from a collectivist mindset. Japanese users require more privacy online and expect a more respectful customer service than the Portuguese. Web design and design in advertising also differ significantly, according to each country’s cultural preferences and customs. Nevertheless, both countries understand the power of digital and demand digital marketing. Social networks are used similarly by Japanese and Portuguese users, and their usage is strongly influenced by age group.

Having completed this research, it is possible to state that Japanese companies can benefit and learn from Portuguese digital marketing strategies, albeit respecting the cultural differences between the two countries, as the way digital marketing has been approached in Japan to date cannot be considered the most effective. However, the opposite cannot be said for Portuguese companies, as they have shown to execute digital marketing strategies more congruently with market demand and current reality.

We can thus conclude that we have met the specific goals of this research, providing potential to the results of this study to carry out the general research goals that we initially defined.

8.1 Personal results

Carrying out this study as a master's thesis allowed us to learn, develop and implement research skills applied to a topic of great personal interest. Japan is a country whose culture has fascinated us for many years, and knowing more about how Japanese companies work, was not only an academic goal, but also a life goal. As a marketing professional and perhaps future academic researcher, it is important that we understand the reality of digital marketing in the country with which we intend to collaborate throughout our career, comparing it with the reality of our country of origin, which we already know intrinsically. Interestingly, this research allowed us not only to know the reality of digital marketing in Japan, but also to know in depth the reality in our own country. We are therefore better prepared to face the difficulties and to contribute to the improvement of companies in Portugal, as well as to adapt to the cultural differences in Japan and to contribute through our foreign perspective as Portuguese. Developing qualitative research, basing it on interviews conducted with professionals from both countries relevant to the study and confronting said interviews with the state of art, provided reliable insights that led to the scientifically proven knowledge.

8.2 Limitations to the study

The literature review was somewhat hampered by the difficulty in finding scientific articles specifically on digital marketing in each of the countries. Ideally, we would have analysed a larger sample of literature. We believe that there is a lot of literature on digital marketing in Japan in Japanese language, but unfortunately, we were only able to analyse articles in English and Portuguese. Regarding Portugal, it was easier to find literature on other Western countries, European or otherwise, than on Portugal alone, perhaps due to the small size of the country.

There were some limitations on access to interviewees. Further attempts at contact were made, namely for companies associated to the Luso-Japanese Chamber of Commerce and Industry, without response. Looking back, we would have liked to have interviewed a Portuguese digital marketing agency as a direct comparison to AdVertize, since Rede is a marketing agency with a specific target audience and does not focus on digital.

Comparing digital marketing in these two countries may depend on a difficult contrast, given the dimensions of each one, considering that the reality of the Portuguese market is based very much on the reality of the European market, and the reality of the Japanese market has a more individual entity.

8.3 Recommendations to the field and future research

All things considered, we recommend that Japanese companies detach a little from limitations imposed by cultural customs, that prevent them from modernising, digitizing, pursuing innovation, and responding appropriately to the digital marketing demand of the Japanese market. They should make use of Japan's technological strength and form an exemplary digital marketing industry for the rest of the world. We also recommend the Japanese workforce to invest their time on learning the English language, as it would as it would empower the industry through diverse possibilities of globalisation.

Portuguese companies should continue to work on their digital marketing development, in order not to be left behind and to increasingly improve their online presence. After all, it is not easy to keep up with the fast pace of digitization in the market.

Regarding future research, it would enrich the study to analyse and test if advertisements produced according to the typical creativity of Japanese advertising would lead to positive results if applied in the Portuguese market.

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Attachment I – Hofstede’s dimensions on Japan and Portugal

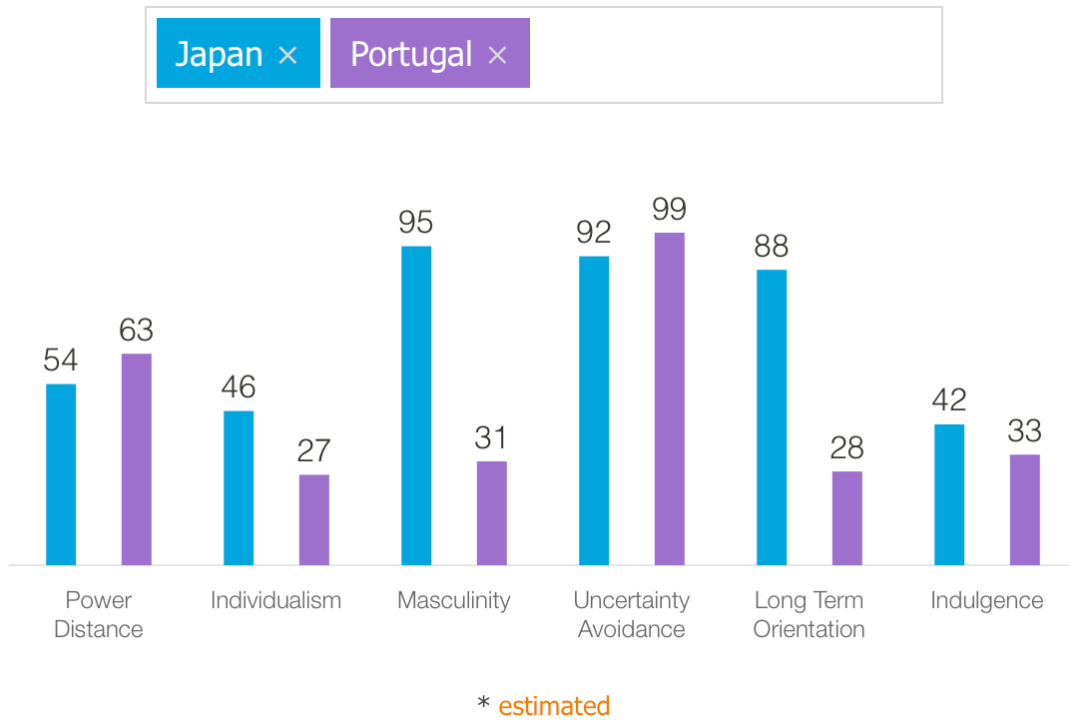


Figure 19 – Chart of comparison between Japan and Portugal accordingly to the Hofstede’s comparative model. Retrieved from ‘Hofstede Insights’.

Attachment II – Advertising expenditures in Japan

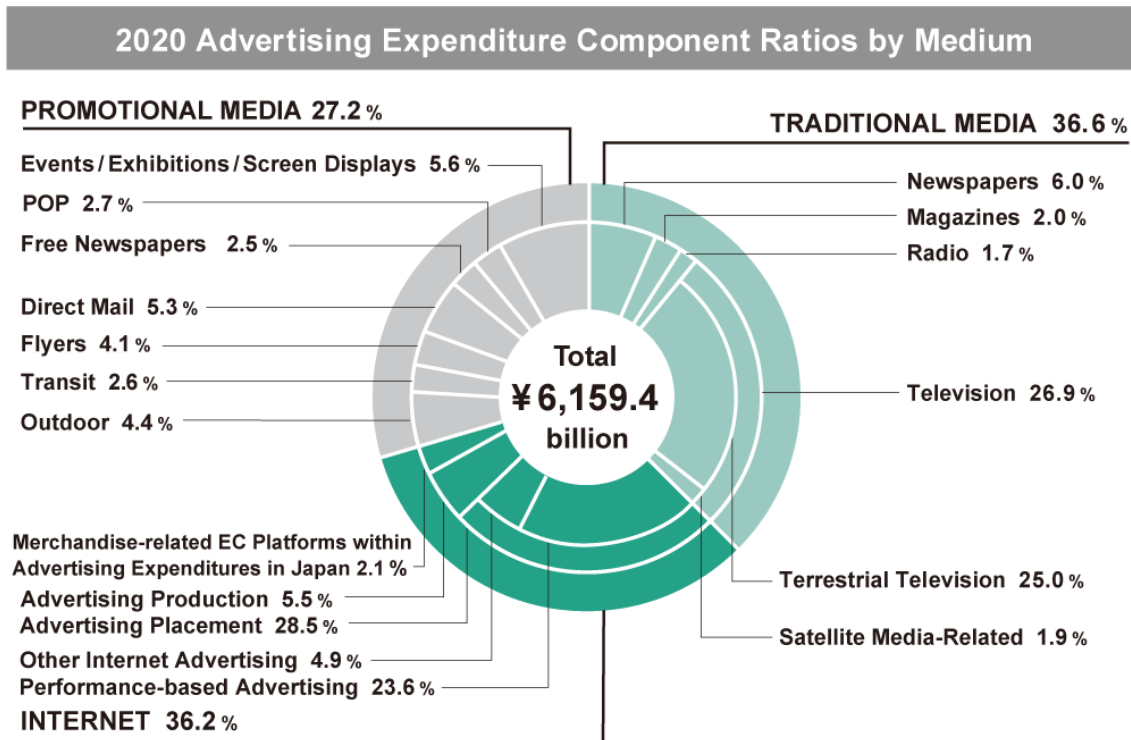


Figure 20 – Statistics on advertising expenditures in Japan as of 2020. Retrieved from 'Dentsu Inc.'.

Attachment III – Internet use in Japan

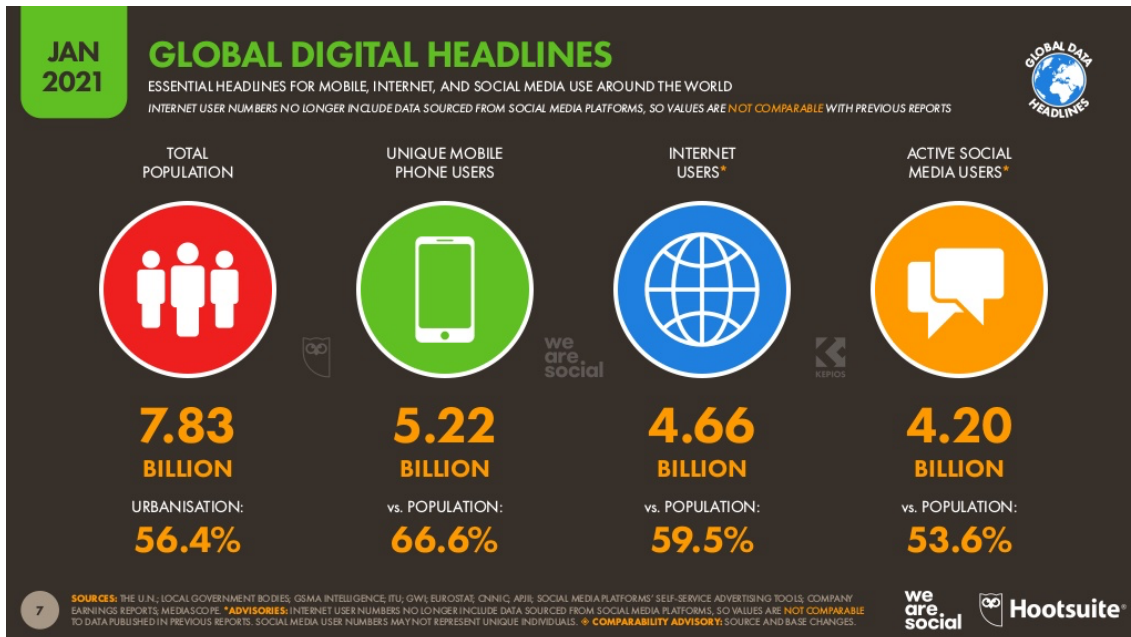


Figure 21 – Statistics on internet use in Japan as of January 2021. Retrieved from 'DataReportal'.

Attachment IV – Social media users in Japan

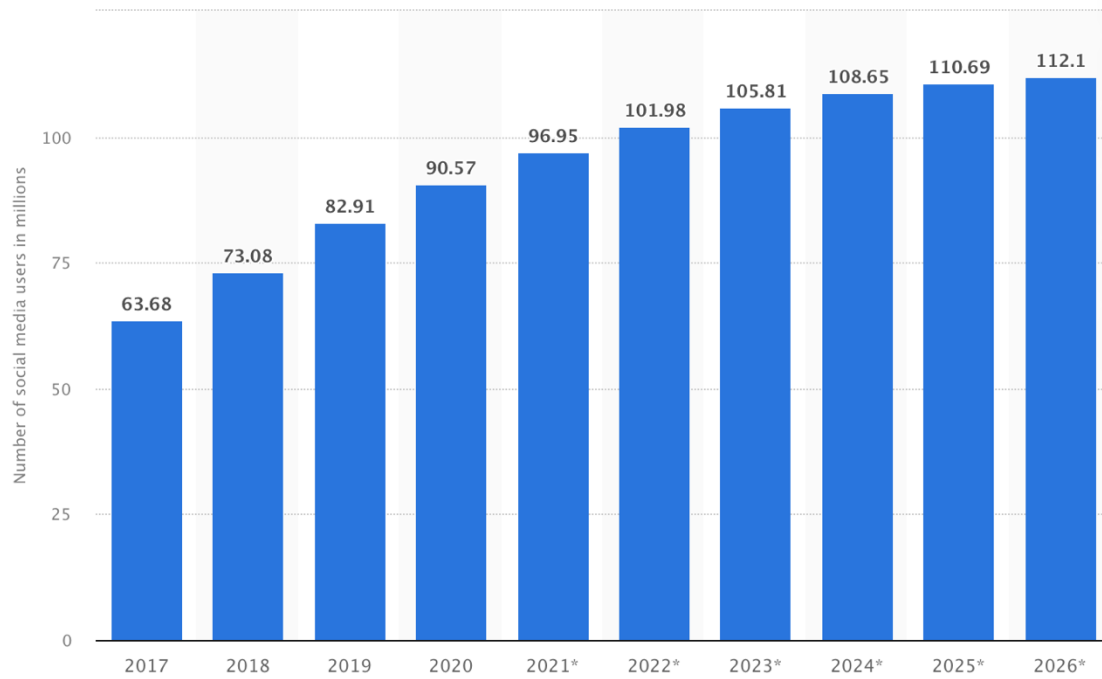


Figure 22 – Number of social media users in Japan, from 2017 to 2020 with a forecast until 2026, as of July 2021. Retrieved from 'Statista'.

Attachment V – Social media platforms in Japan

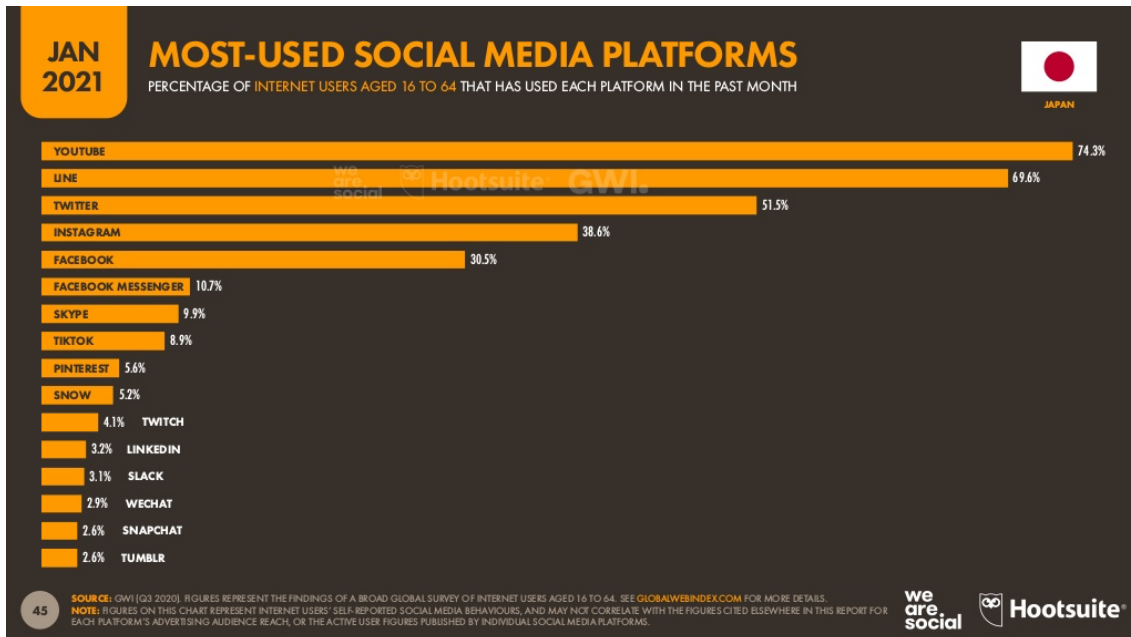


Figure 23 – Ranking of social media platforms in Japan, as of January 2021. Retrieved from 'DataReportal'.

Attachment VI – Social media demographics in Japan

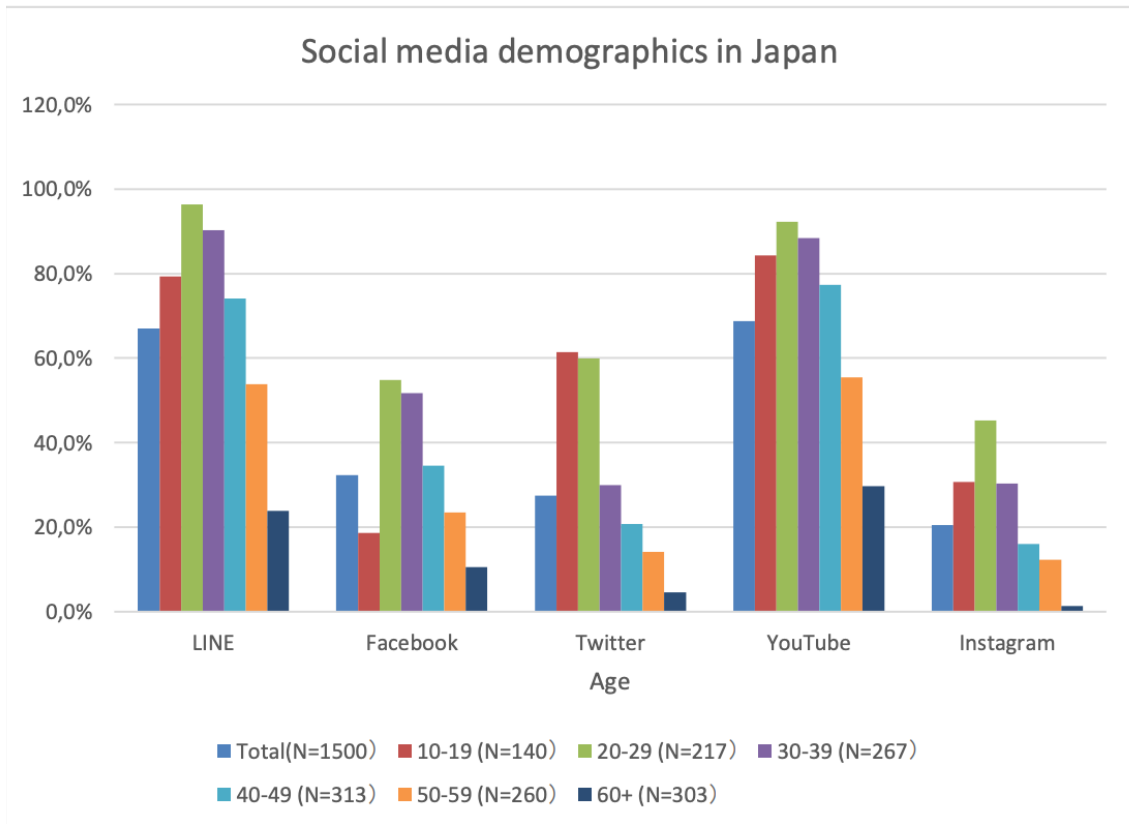


Figure 24 – Social media demographics in Japan, as of 2016. Reported by the Japanese Ministry of Internal Affairs and Communications.

Attachment VII – Digital advertising expenditure in Portugal

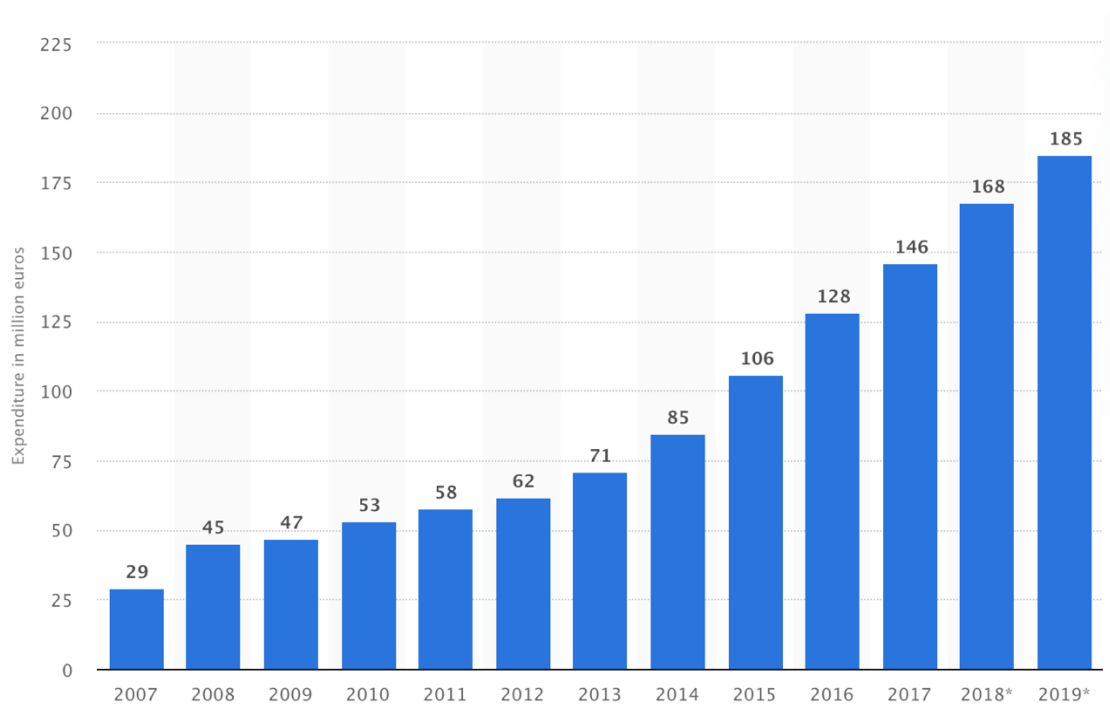


Figure 25 – Statistics on digital advertising expenditure in Portugal from 2007 to 2019. Retrieved from 'Statista'.

Attachment VIII – Portugal population

Portugal Population (LIVE)

10,161,035

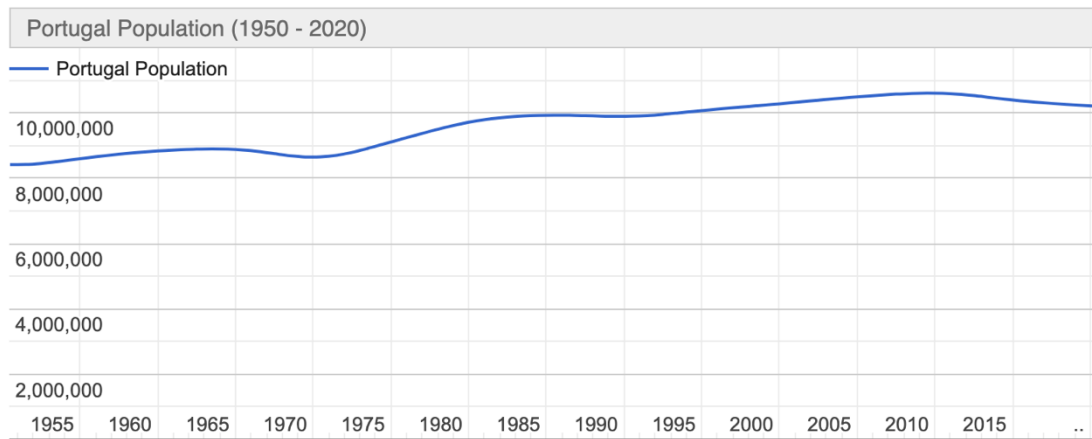


Figure 26 – Size of the population in Portugal from 1950 to 2020. Retrieved from 'Worldometer'.

Attachment IX – Share of households with internet access in Portugal

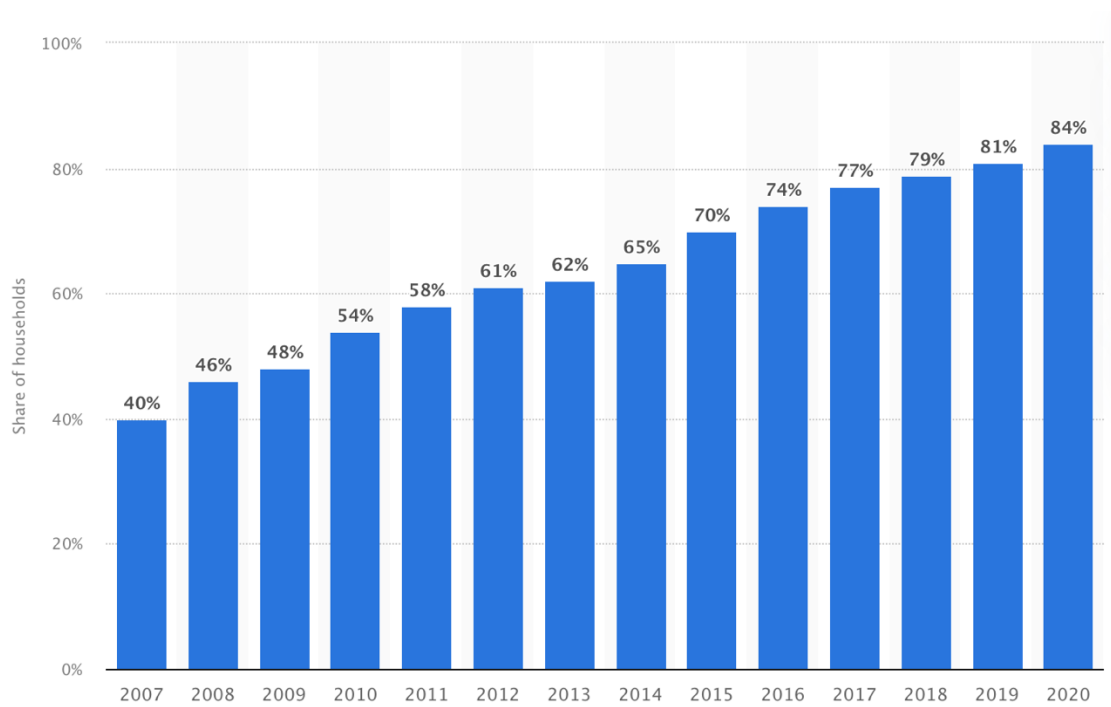


Figure 27 – Statistics on the share of households with internet access in Portugal from 2007 to 2020. Retrieved from 'Statista'.

Attachment X – Mobile internet user penetration in Portugal

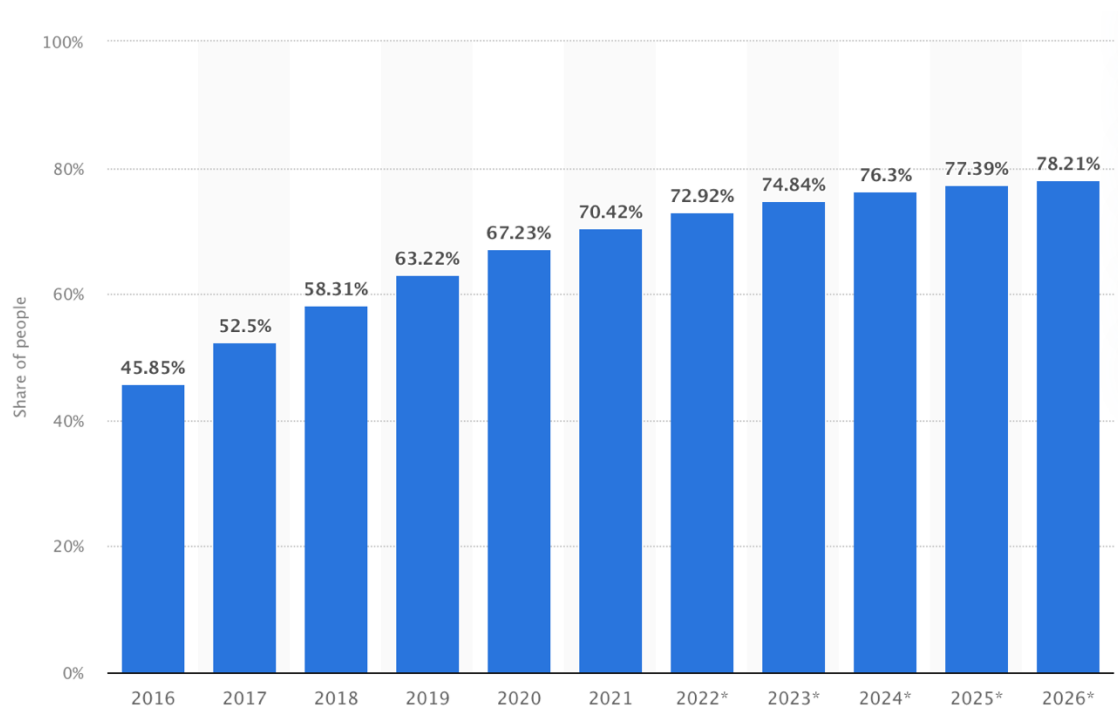


Figure 28 – Statistics on mobile internet user penetration in Portugal from 2016 to 2026. Retrieved from 'Statista'.

Attachment XI – Social media users in Japan

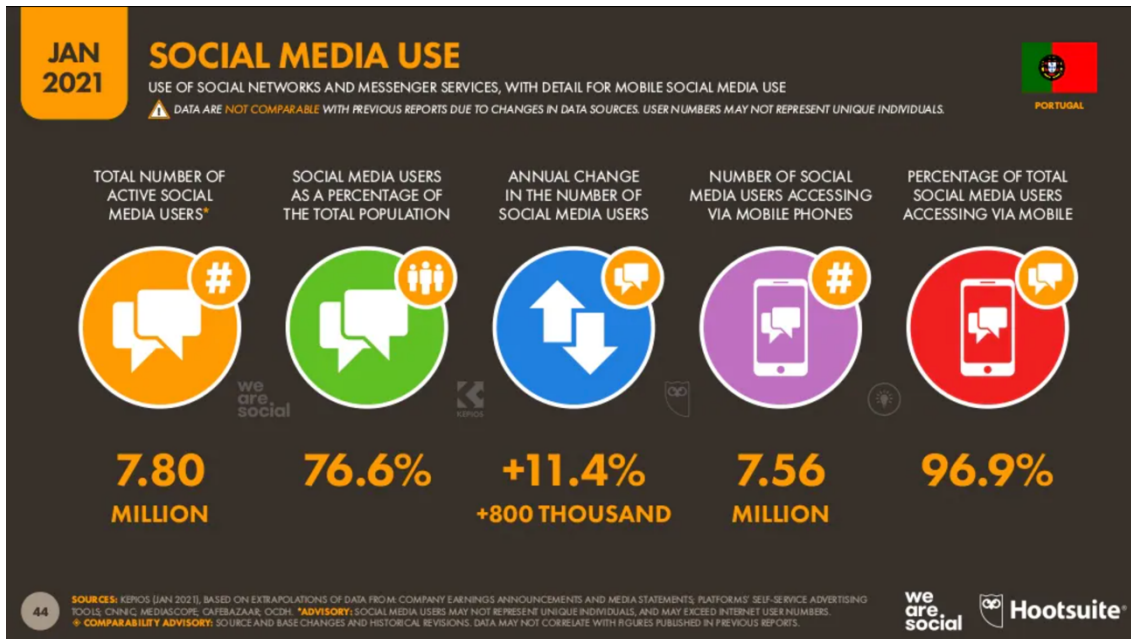


Figure 29 – Statistics on social media use in Portugal as of January 2021. Retrieved from 'DataReportal'.

Attachment XII – Social media platforms in Portugal

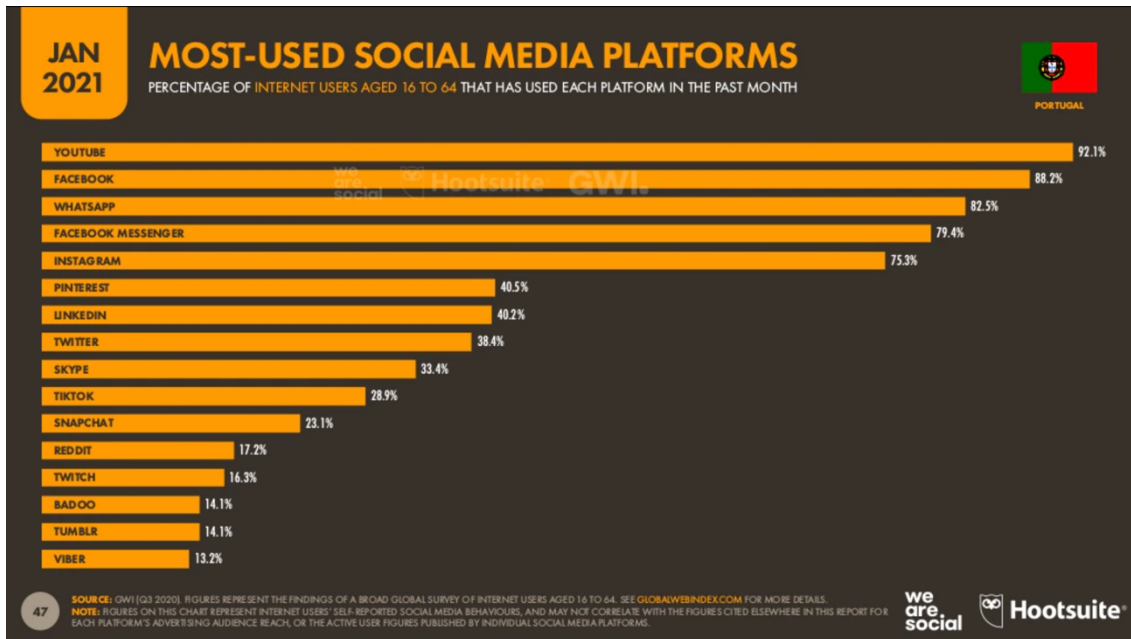


Figure 30 – Ranking of social media platforms in Portugal, as of January 2021. Retrieved from 'DataReportal'.

Attachment XIII – Advertising audience profile of social media in Portugal

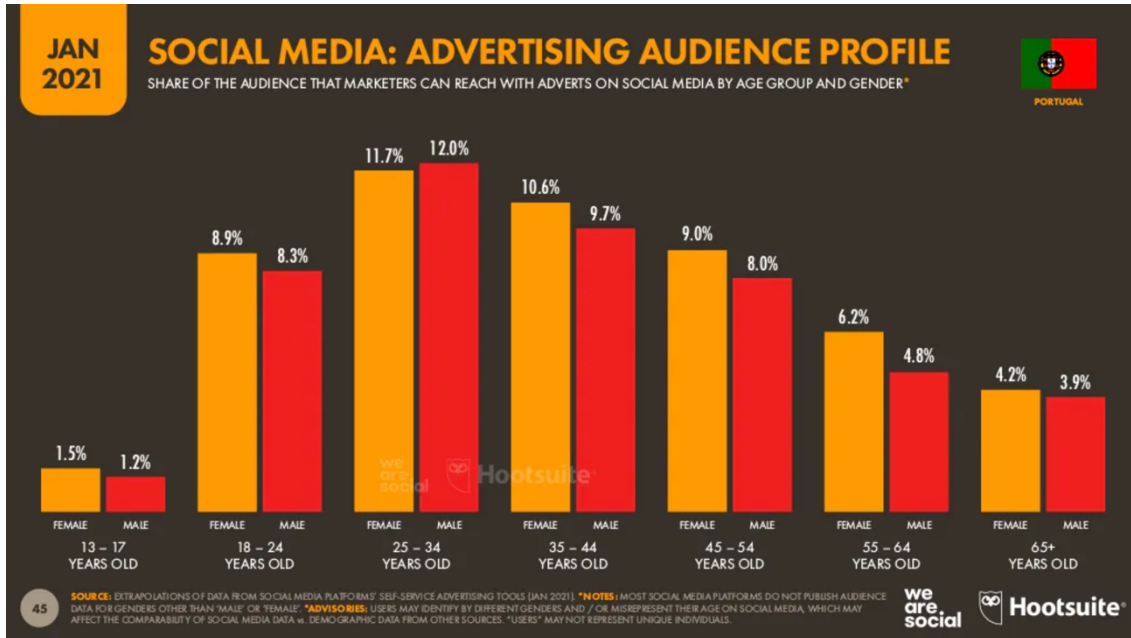


Figure 31 – Statistics on the share of the audience that marketers can reach with adverts on social media in Portugal, by age group and gender, as of January 2021. Retrieved from 'DataReportal'.

Attachment XIV – Results of 2021’s “Brand Strategy Survey” in Japan

企业品牌综合排行榜			
综合排名 (上年)	企业名或品牌名	评价排名	
		消费者	商务人士
1(1)	苹果日本	9	1
2(5)	谷歌	1	5
3(1)	索尼集团	7	3
4(3)	雅玛多运输	3	4
5(4)	微软日本	24	2
6(6)	松下	15	7
7(13)	东陶	11	16
8(7)	丘比	2	52
9(14)	丰田汽车	50	9
9(20)	佳能	70	5

Figure 32 – Original table showing the results of 2021’s “Brand Strategy Survey” in Japan in Chinese. Retrieved from ‘Nikkei Chinese Net’ (cn.nikkei.com).