

〈研究ノート〉

# The First Step of “Japanese Marketing Strategy”

Shoko Okamoto

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## INTRODUCTION

Since her post war reconstruction, Japan has equalled and overtaken many of her Western competitors. This has been largely as a result of meticulous planning, rigorous and ongoing marketing research and a cooperation between government/industry and academia that we are just beginning to comprehend in the West.

Two further points are of note.....

1. This is not a “fad” or a short term trend.
2. Following this strategic approach has led to success in Banking and Insurance Markets as well as Consumer and Industrial Markets.

The fruits of this dedication are plain for all to see and envy.

Viz a progression of GNP (Gross National Product) that has matched and threatens to overtake that of the USA and lowest unemployment figures for any Westernized nation.

The attention of many researchers in recent years has been focussed upon Japan and Japanese practices. Many have sought to attribute Japanese success to a variety of factors, chiefly her labour relations practices. However, whilst these are important in themselves, it is also worth nothing that their approaches to marketing and to finding an outlet for well researched and produced products is a necessary counterpart to this success.

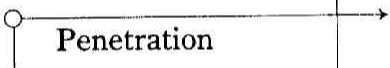


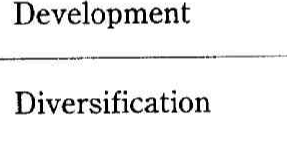
There are conflicting schools of thought as to the origin of Japanese marketing. Some assert that marketing (though not called as such) originated in the Tokugawa period (1650) when Japanese merchants evolved a complex commercial system. Later the Mitsui family established a merchant house in Edo and behaved like a buyer for their customers. This is the first recorded situation whereby someone put himself in the place of another to buy products—the essence of marketing.

The second school of thought asserts that following the devastation of World War II, special committees were established to seek out and report upon the best practices in all fields world-wide.

This accounted for the adoption of German labour relations practices in Japan and similarly the adoption of marketing practices from America. However, of great significance is the fact that Japan, to her credit, further improved upon this. Hence in order to form a valid conclusion, whilst it is true that the origin of marketing to some extent predates and precedes by

300 years that in the West, it must also be stated that in its original form Japanese marketing could not have grown to the all embracing philosophy of its American counterpart today, due to cultural stigmatizations regarding merchants and also the origin of new product ideas. Nevertheless, there exist today large trading houses of which Mitsui is one! To summarize therefore, it is fair to say that in its present form, whilst Japanese marketing borrowed heavily from America, Japanese Marketing Strategy on the other hand is heavily influenced by ancient samurai and military traditions.

Figure 1 Alternative Growth Paths(After I.Ansoff)

		Products	
		Existing	New
M A R K E T S	Existing	 Penetration	 Product Development
	New	 Market Development	 Diversification

### Japanese Marketing Strategy

Whatever its origins, Japanese marketing today represents not only a digest of the best business practices but an enhanced or improved approach to marketing. Kotler and Fahey (1) refer to the Japanese as World Champion Marketers. To their credit, the Japanese have fought to improve further existing approaches to marketing.

A useful starting point is to define marketing strategy. Ansoff (2) refers to this as a product – market posture. Specifically referring to the varying combinations of product offering to markets. A more useful approach is

that offered by Kotler and Jatusripitak (3) who explains Japanese strategic marketing as following two dimensions.

1. Product Strategies based upon Marketing Research and experience in a given market with their initial offering followed by product line extension, and
2. Following market entry, strategies, to add new segments a market penetration/cultivation sometimes referred to as 'rollout' strategy.

We notice that Ansoff's combination of product and market states produces four combinations leading to strategies of penetration (ie, selling more of existing products to existing markets) Product Development, selling an improved product to existing markets or Market development (ie selling existing products to new markets). The riskiest strategy of all is that of diversification selling new versions of products to new markets. Whilst the above is well documented in marketing literature, it is important to notice that in terms of Japanese companies, following market entry, strategies of product and market development can occur simultaneously. This can create a perplexing and unnerving reaction in competitor. Typically they feel out manoeuvred by every possible strategic alternative.

Consider for example a Japanese entrant to the semi conductor industry. The case of Texas Instruments (4) is well documented. Following market entry in West Coast USA, counter strategies were not effected since it could not be perceived that Japanese semi conductors could compete on cost. Perception here was defined from an American perspective of production constraints and high failure rates. However "pivotal factors" or key factors for success (5) ie, for reducing cost became the obsession of

Japanese production and marketing planners, huge resources were put behind "cracking this boulder" (my expression but see quote from "book of five rings" (6). Solution to high failure rate came from "overprinting" or "back up" chip circuitry essentially producing more than one "Vulnerable" circuit per chip thus minimising failure rates. Result : Costs per chip fell dramatically.

From market entry, the next stage was penetration. The objective here was to add segments of buyers of the chip. In this context, buyers referred to OEM (original equipment manufacturers of products). Chips became readily assimilated into calculators and other appliances. During this time costs were falling further due to experience curve effect (7). In summary therefore as a competitor in the chip industry, how would you have reacted to product and market development strategies? Many companies were driven out of business in West Coast USA. To add insult to injury, both the chip and the transistor before it, were developed in the USA.

### **Research Approach Taken**

From the above, it is logical therefore to enquire into how new products are researched including marketing research methods/techniques and secondly how these new products are brought to the market place in the case of Japanese companies.

Inputs for this paper came from a search of Journal articles, personal interviews and a postal questionnaire. As more articles were obtained, the questionnaires became more sharply focussed. There remained the problem of triangulation, that of obtaining a contrasting view over key issues. For this I selected a matched sample of UK/US companies in the same product fields. This produced two questionnaires for Japanese and

British/US companies for markets handling consumer and industrial products. There remained that section of the economy dealing in services eg Banking, Insurance etc. The approach taken here was to create two further questionnaires specifically aimed at Japanese and UK Banking and Insurance companies. In all, four questionnaires were devised and administered. (No attached details of questionnaires here)

### SAMPLE PLAN

a) A sample size of 263 was created. Constraints such as cost, time and variability in the population under survey (8) all operate to affect sample size. (For further discussions of this point, the reader is directed to one of the many texts on marketing research).

Sample composition was follows:

TABLE 1

Table of Firms/Institutions to which 4 Questionnaires were sent

	Japanese Companies Q1	UK/US Companies Q2
Heavy Engineering	11	-
Shipbuilding	4	3
Textiles	-	2
Engineering	11	12
Vehicle Manufacturing	9	1
Spare Part Manufacturing	2	1
Computing	4	5
Film Manufacturing	1	1
Camera Manufacturing	5	-
Chemicals	-	5
Pharmaceutical	-	5
Stationery Manufacturing	3	-
Electronics	57	12
Semiconductors	2	4
Sports equipment manuf	2	-
Sewing machine manuf	2	-
Watch manufacturer	2	1
Sub total	115	52
	Japanese Companies Q3	UK/US Companies Q4
Consultrancy Service	-	14
Banks	30	14
Insurance Companies	10	12
Securities	6	-
Miscellaneous	7	3
Sub total	53	43
Totals	Japanese Companies = 168	US/UK Companies = 95

Where Q1 enquires into Consumer & Industrial product development and market strategy applied to Japanese Companies.

Q2 Ditto above but not applied to contrasting UK/US companies.

Q3 enquires into product development and market strategy applied to Japanese service Institutions eg Banks.

Q4 Ditto above but applied to contrasting UK/US Institutions eg Banks.

b) Sampling method used was to match as far as possible Japanese Companies by sector with their UK/US Counterparts. Towards this end probability sampling could not be used, instead the author made a judgemental sample and matched this with UK companies in the same industrial sector and product fields as shown in Table 1. In addition the views of academics and professional bodies were sought. These are entered under miscellaneous at the foot of the table. Additionally selection was influenced by the research hypotheses outlined in the next section.

### Research Hypotheses

H1 To test if Japanese companies sought to improve on existing (competitors products) or to research future product requirements.

H2 To test for evidence of relationships of Design Engineer, Market Researcher and production planner in effecting new product development.

H3 To test whether Japanese Companies were reactive in their approach to marketing or proactive in their approach.

H4 To test for evidence of a 'roll out' strategy and ensuing sales incentives given a proactive approach to the market place.



### Discussion of Research Hypotheses

H1. To test whether new product development in Japanese companies is the result of improvements upon existing competitor products or is the result of marketing research into future product requirements.

There are contrasting views regarding the source of Japanese new product ideas. One view is that they seek to emulate the best ideas of competitor products. Alternatively they actively seek out future trends in the market place and evolve these into new products.

Yoshiro Hoshino (9) makes the point that initially a developing country begins by adopting the technology of an advanced country, in essence a straight copy. Typically the machine is manufactured to the same specifications as before. However as the machine is operated, technicians learn what the engineers had been aiming for in their design ie the design philosophy. Additionally the machine is put to difference applications. This leads to remodelling of the machine involving

- a. The components themselves, or
- b. The entire machine or system.

Dr Wenlee Ting (10) has summarized this process as following a staged development from market follower to market leader via the roles of imitator –> modifier –> improver –> innovator –> as shown in the diagram below.

Figure 2 The product Innovation Continuum for NIC Firms

(after Dr Wenlee Ting)

Market Follower	Existing Products (Immitator)	>	Modified Products (Modifier)	>	Market Leader	Improved Products (Im-prover)	>	New Products (Innovator)
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The result of this process is that superior product is developed that can match or outperform the original across key dimensions as well as cost (11). Before discussing cost reduction, it is worth dwelling upon product attributes (in this context we define a product attribute as a feature). Culturally Japan has always sought ideas from the West. This is due to the fact that in Educational circles to evolve new ideas domestically has been frowned upon.

Given the aforementioned approach, it is reasonable to assume that product attributes are those of the market in the indigenous (host) country, This raises two further points, therefore

- a) Are products being evolved that have a unilateral appeal (global products) eg watches, computers (PC) (See later)
- b) Is a proactive marketing strategy effecting a change in those markets in which the product is given (unchanged) and the market is cultivated around it. (See discussion of Hypothesis H3)

### Concept of "Keihakutanshoka" (12) and Cost Reduction

Discussion as to the origin of product attributes is realistically conditioned by cost. Only purists of the marketing philosophy would consider developing a product without consideration for cost. Kenichi Ohmae not only explains the important techniques of value Engineering and Value Analy-

sis in cost reduction but also deals with what he describes as KFS or Key factors for success. These could be described as those pivotal factors that create winners. Seen in context therefore, Japanese companies each attribute versus cost so as to engineer value in a product as perceived by the customer. In addition cost reduction can be further improved via developing smaller, slimmer, shorter or lighter versions of products or "Keihakutanshoka concept". The origins of this concept are again cultural. Japanese houses are smaller than those in the West, space is at a premium. Similarly Japanese prefer quieter operating products than the West can offer. British Washing machines produce more noise than Japanese counterparts. Japanese houses have thinner "partitions" than British houses.

Within the prioritization of attributes, close attention is given to "pivotal factors" that enable strong leverage to be exerted in focussed segments in a product field. For instance photographers crave for film with fast speeds. Technologically there has always been a "trade off" between fast speed and size of grain in prints produced, ie faster than film speed and consequent grainier prints. Hence the way to succeed in the market place is "to tackle the bolder" (13) ie focus R and D into producing fast film speeds and smaller grain size.

A further insight is provided in the work of Professor Clark (14), who examined work in Japanese electrical product companies. He made the point that in such companies research/new product development is focussed upon achieving "eg a 10% improvement in performance" or a "7% reduction in electricity consumed" per appliance. The inference is that in the market place such products eg TV sets or washing machines

would have a strong differential advantage against competition. To return to the influences of culture; Japan has historically sought to develop products to make the most efficient use of electricity. This accounts for the plethora of companies in the field of electronics and electrical components. Some agree that this is a result of a lack of natural resources (all oil is imported), there are few coal reserves.

Returning to our original proposition regarding the source of new product ideas, the alternative view expressed was that in reality Japanese companies seek out future trends in the market place and process these into new products, it is increasingly true that in Japan today, new products are developed from marketing research conducted in the markets in which Japan competes. Perhaps both views are correct being merely separated by history!

Lorenz (15) points to the marketing research of Japanese companies. He makes the point that unlike Marketing research of Western companies being concerned to report consumer preferences in current products, emphasis instead is given to future aspirations of customers. Typically research teams are sent to the homes of respondents and in their places of work. Researchers enquire into the contextual usage of the product. A point worth bearing in mind here is that quality in a product, according to Japanese perception, is generated by the contextual usage of the product. Western perceptions of quality emanate from choice of materials or engineering tolerances. Consequently lifestyle market techniques are given much more emphasis in Japan. Most of the large electrical corporations have lifestyle research centres. Sharp have one in the USA to research into their main export markets! An example to illustrate the point is given by

Lorenz regarding the approach taken by Sony (16) in USA, Conventional techniques failed to report that there was market in the USA for small black and white TV sets. However Sony studied the contextual usage of TV sets and found that in addition to the main family TV sets (colour TV), Americans also wanted a small portable to take around with them eg in the garden or workshop or on holiday.

Japanese marketing research differs also in a further additional important regard in that it seeks to ask respondents what they would like to see in a product in terms of attributes.

Lorenz quotes the example of Japanese researchers 'tapping into' the market for refridgerators. Here they found a preference for refridgerators with special compartments for fish bones! This is worthy of note also since it illustrates the point that mature markets can be penetrated using this approach.

H2 To test for the relationship of Design Engineer, Market Research and Production Planner in effecting new product development.

Continuing the discussion of the first hypothesis, questionnaire sought to survey the extent of this relationship in Japanese companies. By implication, given the Japanese approach to marketing research, it is logical to assume that their findings are 'followed through' and become manifest in a new product. perhaps an illustration will serve to advance the point. In recent years, divers watches have become fashionable. The watch in its present form, is water resistant to 200 metres yet it has an alarm to awake one in the mornings. Alternatively there may be those who sleep under

water but it is probably a small market!

In developing the quartz watch in the first place, Susumu Aizawa of Seiko organised a team of 800 Research Engineers reports R. Golding(17). When Honda developed their range of export motorcycles they had 700 Design Engineers on the project. When Hitachi devised a range of robots, 500 engineers set work on the project. In summary, all of this points to the fact that decisions regarding new product development no matter where taken in the company, are taken against the market place. None other than the one business man has referred to a company as going forward almost autonomously, he has drawn parallels between a company and ship, all persons being interdependent, all having a common goal and motivation.

The third leg of the trial that of production planner is significant. The fusion of the research and design engineer must be tempered by cost and also production feasibility. Stone has forwarded the view that in the selection of new product ideas, those that are selected are those that are in keeping with new or future production plans. In essence Japanese companies design both the product and the production process simultaneously. This would support the view that marketing would tend to be proactive to find an outlet for these volume products. This is significant when one realizes that corporate objectives of Japanese companies are market-share orientated rather than financial. The trial also has inputs from the shop floor, operatives are given the chance to contribute to the new product. Culturally in the West, "bright sparks" were ostracised by their workmates until recently. In Matsushita Electric, 30,000 line workers submit an average of 2 million suggestions per year.

This begs the question as to how all of this has relevance to us in the west.

Consider firstly personnel selection policies, these look at an ability to work in a team. Professor Clark expresses it thus; policies are effected which discriminates against "a Faraday or an Enstein". Culturally in the west, the perception of a scientist is of a loner making a breakthrough in his field. Within Japanese Companies, personnel training policies are devised such that the Design Engineer will have had experience in marketing and production management. Culturally in the West, we think of succinct functional specialisms within a company. Against the backcloth of modern product development costing millions of pounds, an inter-disciplinary approach is needed, whereas in Victorian times, when British inventions were at their zenith, a single-minded individual approach achieved the best results. Today we are in a different ball game.

H3 To test whether Japanese Companies were reactive or proactive in their approach to marketing.

As defined here, reactive refers to the traditional view of marketing. In essence working backwards from the market place in identifying needs and wants and in creating a product or service that matches the precise requirements of the market place. In post war years, this philosophy has permeated much management thinking. Companies have switched from being sales orientated to becoming marketing orientated. Sales managers have become subservient to marketing managers.

Proactive, as defined here, refers to creating the product first based on the best possible marketing research and then building a market around it using best sales management approach. Witness the success of the Sony Walkman and of personal computers. Both of these products have had a



market built around them, rather than the traditional marketing approach of starting with a market and then creating a product for it.

No doubt the above will be viewed as a contentious issue by the marketing purists on the one hand and current observers of Japanese products on the other. Consider for a moment the inherent limitations of reactive marketing, it implies passive acceptance and accurate reportage of the consumer status quo. Volumes have been written extolling this virtuous approach. However, with a proactive approach, having devised the best possible product, vigor is placed behind the product. (The position is not unlike a Sales orientated approach which preceded marketing and which was castigated by marketing purists). This has important impacts on the market place.

1. The product itself can change the whole mood of the market place ie, the presence of the new product changes the perceptions of the consumer and if aggregated, that of the market place. This can have immense effects on competitor products after causing them to redesign their products as a result.

2. New advertising platforms have to be created, to communicate the redesigned product attributes. Differential attribute advantages over competitor products have to be devised and emphasized (unique selling propositions). Remember that Japanese advertising spend rates are approximately 3 times competitors in some product fields.

The evidence for this view is given by the development of Seiko quartz



watch. Here the trial of market researcher, design engineer and market planner devised the best possible watch first then systematically built markets around it.

There is also something uniquely Japanese in the "proactive" approach. in that whilst creating a product to change perceptions of the market place, it simultaneously gives them an unassailable lead. For insetance, the Swiss watch industry, essentially craft based, could not hope to compete let alone find the capital investment for quartz technology at that time. Recent developments is the Swatch—the result of a conglomerate of watch producers has counteracted this to some extent. The point however is that competition is not just in terms of the product we make but can be the structure of the industry that we are in.

Reinosuke Hara (18) provides a useful insight into Japanese new product development. His research indicates the origin of new product ideas as follows;

## TABLE 2

### Sources of New Product Ideas

44.8% from other private companies in the same field

34.5% from other private companies in a different but related field

17.2% from foreign companies

3.4% from universities and research institutes

Source; Management of R & D in Japan by Reinosuke Hara, Sophia University.

He further illustrates new product development as being a prioritization rather than a sequential development that we are used to in the West. In the Japanese approach, referred to as Sashimi (19), different members of the trial (Hypothesis 2) work to achieve strong new differential advantages. He prioritizes these as follows.

Top priority: To improve the characteristics of the product and its operation (refer back to Japanese definition of quality in this context).

Second priority; To expand the applications of the product. (refer back to the diver's watch example).

Third priority; To reduce cost.

Fourth priority: To simplify design and miniaturize—remember philosophy of Keihakutanshoka?

Fifth priority: To design the system (around the product) my parenthesis. I would suggest that new product idea selection in the first place is conditional upon priority five.

He also points out that any fundamental research project is of low priority except in such industries as semi-conductor and genetic engineering.

H4. To test for evidence of a “roll out” strategy and ensuing sales incentives given a proactive approach (Hypothesis 3) in the first place.

“Rollout” strategy refers to the methods by which a competitor grows

beyond initial market entry. It encompasses the twin stages of firstly penetration ie, growing market share through achieving higher sales to existing customers and secondly gaining new segments (or groups) of customers with redesigned products.

These are usually range extensions upwards (larger versions) or downwards (smaller versions).

Interest in this area was initiated by the Doyle (20) survey of 1982. When researching into corporate objectives, Professor Doyle found a sharp contrast between those of Japanese and Western Companies. Typically those of Western Companies were couched in terms of market shares to achieve. Others notably Dr Abegglen and Dr Ballon have explained reasons for this as emanating from financial structure of companies ie return to shareholders priority thus creating short term return on capital focus as opposed to long term views of Japanese companies.

Of interest to us is the latter, Shiro Takeda (21) has developed a linear penetration model in which the manufacturer sets up his own local office to handle importation and sales of its products but relies upon local indigenous distributors for sales to wholesale and retail outlets. This stage assumes a successful market entry by a large trading house in the first instance. He distinguishes between marketers of Japanese cameras and sewing machines, going no further than local offices with those of household electrical appliances and cars who though exporting later, progressed to a stage beyond local offices to sell directly to retailers and support them via producer mounted promotional schemes. Essentially strategic marketing in this context is manufacturer led rather than the local agency or sales office led.

Takeda cites as advantages for this the need by manufacturers to develop information gathering so as to enable it to “sensitize itself” to its markets thus permitting good strategic marketing. Ultimately, the manufacturer will undertake local production and export of locally produced goods.

The advantages of this approach are chiefly attributable to the experience gained in these markets. A thorough grasp of the competitive strengths of their products but more importantly systematically accumulated information about that market’s trends and their own position in it.

Research at Warwick university, by Professor Saunders, recently concluded that Japanese companies ‘grow’ their markets (22). He suggested that by effective targeting, companies could create new market segments or by converting uses of existing products, build market share.

Of great interest is how Japanese accomplish market expansion..... Previous discussion has centred upon developing the best possible products, however the key to understanding expansion lies in a thorough grasp of distribution strategy.

There is evidence that distribution channels are ‘supply driven’. Work by Ryans and Shanklin (23) explains supply-side marketing “as any instance when a product can create a market for itself in lieu of the conventional other way around.” In their original Paper they referred to new products or revolutionary processes. They now conclude that the same is true of modifications or improvements to existing products. Hence it is the method of expanding market share.

Work by Prentice (24) has shown that in Japanese distribution channels there is strong force feeding and volume discounts to channel members to achieve product awareness. Given the considerable cost advantage of Japanese products, it is logical that there is more latitude available in terms of dealer (25) margin/discount than from Western competitors. Lastly sales force incentivization schemes complement dealer incentives. Toyota's scheme in the USA aims to motivate volume sales of vehicles via a series of prizes and holidays abroad.

Finally the strategy of product proliferation in conjunction with distribution strategy is worthy of discussion. In 1981 a 'head on' clash of Yamaha (26) and Honda took place for the smaller engine size bikes. Honda launched 27 new models in the sector of the market. This has the effect of deluging agents with models thus excluding available display space for competitor's products. In 1982 Honda (27) launched 45 new models (one every week). In a similar strategy, Seiko sought to dominate the watch industry by creating models to cater for all segments. At the retail distribution end of the strategy dealers were swamped with display requests by Seiko representatives. This effectively reduce display space for competitor models!

## SUMMARY

Japanese marketing strategy is a fascinating study in how to compete against world leaders and exponents of American marketing strategies. One can only admire the Japanese who have not only competed successfully but overtaken many household names.

There are many parallels to be drawn between UK and Japan in terms of

size of country and resources. The difference lies in approach to exports and international marketing. Too often attention is diverted into issues other than real issues. Current attention is obsessed with Japanese labour relations practices. In reality it is Japanese Marketing that needs to be understood. British management has the responsibility to equip itself with these techniques rather than to pass the buck.

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Mr. Roger Dace, a senior lecturer of Portsmouth Polytechnic, has researched Japanese enterprises in England for several years, in which I was so interested. And he has reported "Japanese Strategic Marketing" there. This is the introduction of the paper on those Japanese enterprises working out jointly by Mr. Roger Dace and myself.

I am so glad to release the paper here with his approval.