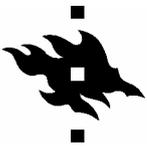


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Mapping Media and Communication Research: Japan

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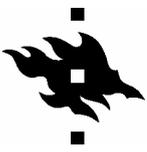
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Mapping Media and Communication Research: Japan

Abstract:

The objective of the report is to provide a general overview of media and communication research in Japan. The project maps the main institutions and organizations, approaches and national characteristics of the media and communication research in Japan. The gathering and analysis of the data has been carried out during the spring of 2007. The sample consists of secondary data in the form of previous studies and existing statistics, as well as primary data such as interviews of key persons in media and communication research branches and media industry.

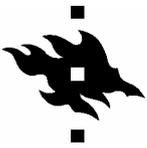
The report examines the media and communication research conducted at the most prominent research universities, the research published by academic associations, and those conducted by the largest public and private research institutes and think tanks with affiliations to some of the largest Japanese media companies. It also gives a general outline of the historical development and the current situation of the Japanese media industry and market, including reference to current content and user trends.

Keywords: Japan, media industry, media market, media usage, media and communication research, media statistics, journalism, information society, ubiquitous Japan, u-Japan, media literacy, public journalism, university education

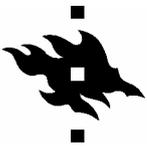


Content

Content	3
Acknowledgements	5
Introduction.....	5
1 The media landscape in Japan	9
1.1. Basic information on Japan	9
1.2. A brief history and the current situation in Japanese media markets.....	11
1.3. Media policy and national strategies	23
<i>U-Japan strategy reaches for the future</i>	24
<i>Intellectual property rights under negotiation</i>	25
1.4. Current trends in media markets.....	25
<i>Television still strongest, but facing change</i>	27
<i>Newspapers and publishing hanging in there</i>	28
<i>Business models and advertising in a time of new media</i>	29
<i>Telecommunication driving change</i>	30
1.5. Media content, reception and consumption.....	33
<i>Mobile business trends: new contents have found eager users</i>	38
1.6. Media industry associations	40
2 Research institutions and organizations	42
2.1. The university, media education and research	43
2.2. Background and current situation of academic media and communication studies in Japan	44
2.3. Academic associations.....	52
<i>The old associations</i>	53
<i>The new associations</i>	55
2.4. Independent (private and semi-public) research organizations.....	56
2.5. Publicly funded research organizations.....	57
2.6. Research institutions of media and telecom companies	59
2.7. Competition over research funding.....	63
3 Main approaches in media and communication research	65
3.1. Theoretical and methodological developments	67
3.2. Public service, public sphere and research of journalism	68



3.3. Educational media, media education and media literacy	70
3.4. Gender and media	71
3.5. Research of popular culture has deep roots	72
3.6. Audience and reception study approach	74
3.7. Media history.....	75
3.8. Media industry, media economy and policy research.....	75
3.9. Research on natural disasters and communication	76
3.10. The “socio-information” approach	76
3.11. Summary: National characteristics in communication and media research.....	78
4 Intertwined future of the industry and media/communication research.....	79
4.1. Crossing boundaries.....	82
4.2. Towards stronger professionalism: School of Journalism at the university.....	83
4.3. U-Japan: potential and empty air	84
Literature	86
<i>Home pages of institutions</i>	91
<i>Selected journals</i>	94
Appendices	96
<i>Appendix 1: List of illustrations</i>	96
<i>Appendix 2: List of informants’ organizations</i>	97
<i>Appendix 3: Databases used</i>	98



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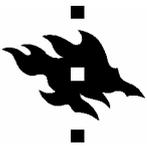
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Introduction

Mapping Media and communication Research is a Communication Research Center's (CRC, University of Helsinki) project that examines the contents and trends of the current media and



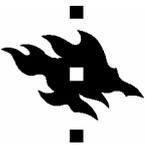
communication research in seven countries. These countries include Finland, the U.S., Germany, France, Japan, Estonia and Australia. This research project is funded by Helsingin Sanomat Foundation, which has also granted similar disquisition on media and communication research made in South Korea.

The focus of the project is mass communication research, but takes into account also studies on speech communication, organizational communication, public relations, research and development of communication technology, as well as economy of communication to the extent that they are related to mass communication research. The project maps not only the academic media and communication research but also the research made by governmental institutions and private research agencies, as well as – when possible – the private media companies' own research activities.

The objective of the project is to provide a general overview on media and communication research in the aforementioned seven countries. The project maps the main institutions and organizations, approaches and national characteristics of the media and communication research in each country. The focus of the project is on years 2005 and 2006, but some parts of the project have sample data also from a longer period. The gathering and analysis of the data has been carried out during late autumn 2006 and spring 2007. The sample consists of secondary data in the form of previous studies and existing statistics and primary data, such as interviews of key persons in media and communication research branches.

The main research questions of the project are: What kind of media and communication research is carried out in a specific country? How do different approaches relate to each other? What is the relation between the research and communication industries and what kind of applications does the research have? How is media and communication research focused in each country and where is research directed for the future?

Each country creates a unique context for media and communication research. Thus, this research has been organized in different ways in the respective examined countries. In addition, the definitions and conceptualizations of media and communication research vary among contexts and countries. Therefore, meaningful comparisons of research among different countries have proven to be a difficult task. For example, the national media statistics of studied countries are often based on incomparable data and methods. Therefore, the project will not provide statistically comparable data on the media and communication research of the target countries. Due to these difficulties in



comparability, every sub report provides country-specific explanations for concepts, samples and methods used.

To enhance meaningful comparability among sub reports, the research questions, research principles and the structure of the report are common for every report. Researchers working on the reports together decided upon the organization, themes and questions for the interviews. Each report starts with an introductory chapter. This chapter will provide information about the target country and its media landscape – i.e. media and communication systems and markets.

The most important part of the project is the interview study of key persons. The interviews produce primary data not only about the facts on media and communication research in each country but also the estimations and visions of the state and future of the research. These interviews create the basis of the project; they constitute a unique collection of statements given by recognized researchers.

The report on Japan first gives the general outline of the current situation of the media industry and media and communication research in Japan. Changes in technology, media industry and academia have already led to profound changes both in the contents of media and communication research and in the structures within which the research is conducted. The report on Japan thus focuses on giving a general outline on the organizations and institutions that conduct media and communication research and on giving a general picture of the kinds of approaches to media and communication that have been most often used in the last few years. The report also gives a brief general outline on the historical development of media and communication research in Japan and describes the media industry and governmental media policies and strategies of recent years.

It is important to acknowledge that this report has some unavoidable obstacles. Despite the ambitious goal, it is impossible to portray all media and communication research or even to give a full reliable picture of the amount of media and communication research in Japan. This is simply because of the immense amount, as well as restrictions in access and limited time. However, the report examines the media and communication research conducted at the most prominent research universities, research published by academic associations and conducted by largest public and private research institutes and think tanks close to some of the largest Japanese media companies. Commercial marketing research companies and commercial companies focusing on viewer, listener and user ratings or measurement of advertising efficiency are excluded simply because of the sheer



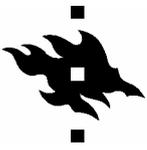
amount of these organizations. Those private research institutions that are represented in this report have active research agendas of their own, despite the fact that a majority of the work is commissioned.

The goal is to provide a general overview of the media industry and contemporary media and communication research in Japan. The material has been collected using various methods: through informant interviews, Internet-searches, information materials – such as yearbooks and other materials of media companies and research institutions – , statistical data provided by the Ministry of Internal Affairs and Communications (MIC) and private research institutes, and keyword searches of databases and journals. The backbone of the research is my prior experience with Japan, with Japanese media and research conducted on Japanese media.

The term “media” in Japan has various connotations, and the term “media research” more often implies information, multimedia and computer studies rather than humanistic and social scientific research of mass media, which is the implication in Finland. In this report, the terms have been used in a way that best expresses the Japanese circumstances. Where necessary, concepts have been explained and defined.

In the field of research, Japan is known for high-level achievements in natural sciences and technology development. In media and communication research, communication technology has by far the area received the most attention and funding from both public and private sources in Japan. The u-Japan strategy and other visions of the future lead the development of humanoids and robotics, research on human-computer communication, ubiquitous computing and mobile technology. However, as defined in the common outline of the research project, this report focuses primarily on mass media and only refers to the technological research to the extent it is related to research of mass communication.

Japanese names in this report have been written in the Western way, in the order of surname and given name. The Japanese way of writing names places the surname first. Japanese words have been transliterated according to the Hepburn system, except that long vowels have not been specifically indicated.



1 The media landscape in Japan

This chapter first gives a brief introduction to Japan and then moves to describe the development of Japan's media industry, after that giving an outline of the situation in media policy and strategies. Next, it focuses on the current trends of media markets and the current situation of media content, reception and consumption. Finally, the chapter ends with a brief description of the most important industry associations.

1.1. Basic information on Japan

Japan has 128 million inhabitants and is the second largest national economy by nominal GDP in the world. Capital city Tokyo is the world's largest metropolitan area, with 30 million inhabitants living in the greater Tokyo area.

Table 1.1. *Information on Japan*

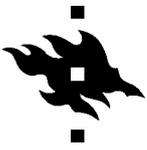
<i>Government</i>	Constitutional monarchy
<i>Formation</i>	History since 660 BC, current constitution 1947
<i>Official language</i>	Japanese
<i>Area</i>	377 873 km ²
<i>Population</i>	Approx. 128 million (2006)
<i>Capital</i>	Tokyo (12 million, 30 in the greater Tokyo area)
<i>GDP (nominal), 2006</i>	38,341 USD/inhabitant

Japan is located in East Asia. The four main islands of Japan are Honshu, Hokkaido, Shikoku and Kyushu, Honshu being the main island, with biggest cities Tokyo, Kyoto, Osaka and Nagoya. Natural disasters are common in Japan and the island encounters 10 – 30 typhoons every year. Japan is also located on the crossing of three tectonic plates.

Picture 1.1. *Map of Japan*



(Wikipedia 13.3.2007)



Japan is considered as one of the most homogenous societies in the world. There are three old minorities in Japan. The *Burakumin*, who number about three million, is the so-called "caste-less" group of Japan. Then there are about three million people of Korean ancestry, called *Zainichi* Koreans. The third group, the *Ainu*, is an ethnic group indigenous to northern Japan and the Kuril Islands. There are about 150,000 Ainus.

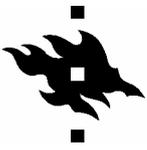
The number of foreign residents in Japan has increased significantly since the turn of the century. Because of the strict immigration policy, Japan has only about 2 million legal foreign residents, which is about 1.5 percent of the population. The largest groups are Korean, Chinese, Brazilian, and Filipinas (MOJ). There is also a significant population of illegal foreigners.

After the Second World War, Japan was occupied by the US, and the current constitution was formulated in 1947 under occupation forces. At present, the Japanese government led by Prime Minister Shinzo Abe is discussing a renewal of the constitution. A law on general elections necessary for the renewal was passed in the Diet during the spring of 2007.

Japan experienced a miraculous recovery after the end of WWII. Economical development, consumption and growth were the ideological driving forces behind society until the turn of the 1990s, when the so-called "bubble" burst and Japan fell into a recession that lasted for ten years. During those ten years, however, Japan increased in its popularity on a global scale.

Products of the Japanese manufacturing industry spread around the world from 1960s onwards, first as cheap and low quality products, then increasingly high quality but reasonably priced everyday items: cars, home appliances, and consumer electronics. The concept of information society was invented and first used in Japan in the 1960s. Although the spread of mobile phones did not begin in Japan, the development of mobile technology content business has already been, for several years, the fastest and most advanced in Japan. Japan has also recently developed into a major importer of media contents, brands and fashions and other cultural innovations such as *karaoke* and *sudoku*.

In last twenty years, the influence of Japanese popular media culture has strengthened in the global setting. It has been growing since the mid-1990s in the US and England (e.g. Kinsella 1999). In 2002 journalist Douglas McCray invented the concept "Japan's Gross National Cool" to describe the trendiness and appeal of Japanese popular phenomena outside Japan.



This “Japan Cool” or “Cool Japan” has now returned to Japan, and is utilized for different purposes. Akihabara in Tokyo, earlier known as the paradise for lovers of electronic equipment, has in last ten years broadened its scope to *anime* (animation films) and *manga* (comics) related products, as well as *cosplay* (costume play, dressing up as figures of popular culture) and Internet cafés, and is now known as the “mecca” of *otaku* (nerds, geeks, or simply pop culture fans) and the core of Cool Japan.

The Cool Japan term has also been taken up by Japanese politicians, who have decided that cultural content production will be made one of the new success stories of Japan (e.g. Koizumi 2006). According to the official foreign policy outlined by minister Taro Aso, the concepts of Japan’s Gross National Cool and Cool Japan are now also utilized in Japanese cultural diplomacy (Kawada 2006). Thus, what started out ten to twenty years ago as an underground phenomenon, and had grown through small independent export efforts into an industry, has now gained an official status as a growth industry and part of cultural exchange. Japanese researchers are also looking into the phenomenon of Japanese popularity outside the country (e.g. Nakamura & Onouchi 2006, Sugiyama 2006).

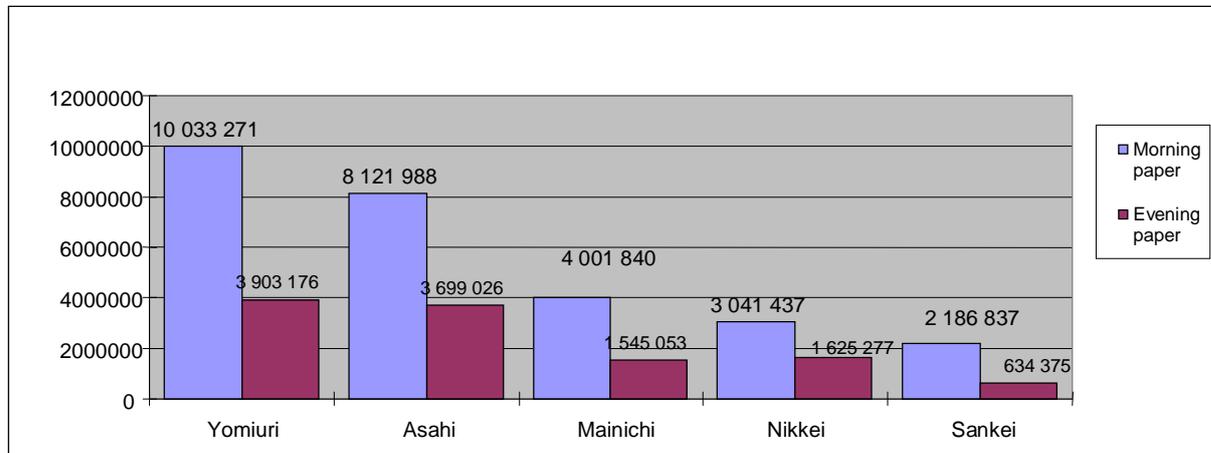
1.2. A brief history and the current situation in Japanese media markets

The prototype of the newspaper in Japan was *kawabaran* or “tile block print,” which first appeared in 1615. *Kawabaran* were one-page flyers printed using roof tiles of houses as negative prints. They appeared irregularly and contained scandalous information on lovers’ suicides, disasters and other sensational events. The first modern newspaper in Japan appeared fairly late in international comparison. The first paper was published in English, in 1861. It was *The Nagasaki Shipping List and Advertiser* and appeared twice a week. The first Japanese language newspaper appeared in 1862. The first daily newspaper, *Yokohama Mainichi* was first published January 28, 1871. (Moeran 1996, 7.)

Currently newspapers in Japan can be divided into four categories: general newspapers, sports newspapers, specialized (often business) newspapers and free papers.

There are five *general newspapers* with national circulation (*zenkokushi*): Yomiuri Shimbun (10 million), Asahi Shimbun (8 million), Mainichi Shimbun (four million), Nihon Keizai Shimbun (three million) and Sankei Shimbun (two million). Each of these national newspapers prints two editions every day. (Fujitake 2005.)

Chart 1.1. *Largest Daily Newspapers by Circulation*



(Shimbun Nenkan '06-'07, 106-142)

The saturation level of national newspapers is very high in the cities. They also have local editions. However, local newspapers are more popular than the national five in some prefectures, such as Tokushima, Aichi and Hokkaido. (Fujitake 2005.)

There is a historical reason for the current strength of national newspapers. During the militaristic system in the 1920s and 1930s, the government promoted the merging of newspaper companies, especially after the Manchurian incident in 1931. This was because fewer newspapers with larger readerships were easier to control and censor for the government. (Ibid.)

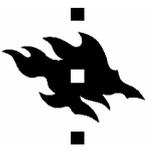
Japanese newspapers are mostly delivered to the door, and only a minority of the income of newspapers comes from newsstand sales.

Table 1.2. *Largest newspaper companies by turnover (unit: million, 1€ = 157 yen)*

		2000	2001	2002	2003	2004	2005	2006
1	The Yomiuri Shimbun	3 138	3 202	3 110	3 118	3 054	3 099	3 106
2	The Asahi Shimbun	2 572	2 755	2 658	2 585	2 587	2 587	2 562
3	The Mainichi Newspapers	1 073	1092	1 030	1 001	982	1 004	971
4	Nikkei Inc.	1 597	1 578	1 450	1 425	1 450	1 482	---
5	The Sankei Shimbun	859	860	871	824	834	832	820

(Joho Media Hakusho 2005, 2006, 2007)

Sports newspapers are the equivalent of the yellow press in the Britain. The content of the sports papers consists of sports, entertainment, leisure, gambling and sex. Recently sports newspapers have moved into scandal journalism with articles about atrocious crimes, natural disasters, large-scale



accidents and social scandals. Major sports newspapers include Nikkan Sports, Sports Nippon, Sankei Sports, Daily Sports, Chunichi/ Tokyo Sports, Tokyo Sports, Kyushu Sports and Chukyo Sports. Most of the sports papers are in corporate alliance with general newspapers. Sports newspapers are sold on the newsstands at train stations. (Fujitake 2005.)

Specialized newspapers and business papers have significantly smaller circulation. The largest business papers are Nikkan Kogyo Shimbun (20 thousand), Nihon Nogyo Shimbun (390 thousand), Nikkei Ryutsu Shimbun (270 thousand), and Nikkei Sangyo Shimbun (180 thousand). There are three major English language newspapers: Japan Times (50 thousand), Herald Asahi (40 thousand) and Daily Yomiuri (40 thousand). (Ibid.)

Free papers and magazines have been published and distributed in Japan since 1971. They are distributed at stations and funded through advertising only. The largest is Sankei Living with circulation of little over 2 million. The free papers compete with newspapers and sports papers in advertising and readers. (Ibid.)

The advertising industry in Japan began developing together with the newspaper. The main worry for publishers of newspapers was finance. There were two types of newspapers: those subsidized by various political parties, and were expected to follow the opinions of the funding organizations, and those who stayed independent of political views and relied rather on crimes, accidents and gossip to attract larger readerships. The latter ones began the advertising business to gain editorial independence from political parties. By the beginning of 20th century the differences of these two types had disappeared, and newspapers relied on both circulation and advertising for their financial survival. (Moeran 1996, 8.)

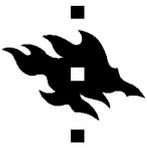


Table 1.3. *Largest advertising agencies by turnover (unit: million, 1€ = 157 yen)*

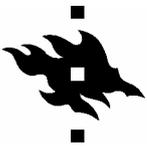
		2002	2003	2004	2004	2005
1	Dentsu	8 722	8 784	9 588	9 587	9 931
2	Hakuhodo	4 338	4 494	4 349	4 297	4 509
3	ADK	2 133	2 278	2 382	2 382	2 451
4	Daiko Advertising	972	1 012	920	920	929
5	Tokyu Agency	1 173	1 042	878	878	794
6	Yomiko Advertising	678	709	684	684	650
7	East Japan Marketing & Communications	552	535	567	567	613
8	Delphis	312	337	431	431	500
9	Asahi Advertising	366	384	368	368	363
10	Nikkeisha	309	296	311	311	312

(Joho Media Hakusho 2005, 2006, 2007)

The advertising agencies acted first as the intermediaries between advertisers and newspapers, and first specialized in buying and selling space in the newspaper. They also did space jobbing and space wholesaling (Moeran 1996, 9). Broadcasting advertising began at the same time both in radio and in television, as there was no commercial radio in Japan before the Second World War. Television and radio advertising took off rapidly in 1959, and television advertising overhauled radio and newspapers in 1975. Advertising agencies became heavily involved with program production and programming since the beginning of television (Moeran *ibid.*, 12 – 14). In Japan, the role of advertising agencies is still very strong in the planning of programs, inventing new program types, and finding sponsors for these programs.

The strongest Japanese news agencies are Kyodo News Service and Jiji Press. Kyodo News Service is a corporation, which traditionally transmits news mostly to media companies, such as newspapers and broadcasting stations. The joint-stock corporation Jiji Press, for a long time, only focused on government offices, businesses and the publishing companies of journals. Recently the division of labor between the two has dissolved and both sell news services to the media. (Fujitake 2005)

The Japanese media system cannot be described without reference to the *kisha kurabu* or the press club system. Press clubs are, in practice, PR organizations for governing bodies such as the government, local government, the police, political parties and NHK. The clubs organize press conferences, seminars, events, interview possibilities and information distribution. Reporters who belong to the respective press clubs, receive information through the press club meetings, and with time become strongly affiliated with the organizations to whose clubs they belong. There are about

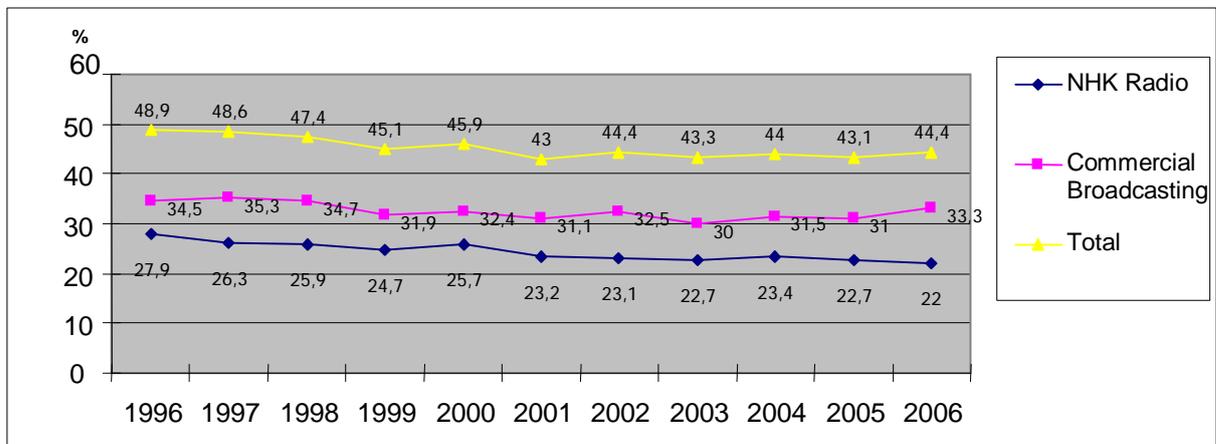


800 – 1000 press clubs in Japan. Freelance journalists are not accepted as members. There are also independent press clubs; the most prominent ones are the Japan National Press Club and The Foreign Correspondent Club.

Radio broadcastings in Japan were begun in 1925 by the Tokyo Broadcasting Station, which was a semi-governmental institution and later became the predecessor of present day NHK. The NHK radio service was modeled after the BBC. It became a vehicle for military propaganda before and during the Second World War. (Cooper-Chen 1997, 107). Commercial companies were the first to begin broadcasting after the war in 1950. Already by the 1990s Japan had more than 300 radio stations, the majority being AM radio stations. The number has multiplied since then, especially with the growth in the number of FM community radios since the turn of the century. (Fujitake 2005, 81.)

The contact rate of radio has stayed more or less intact for almost ten years. (See Chart 1.2.)

Chart 1.2. Daily Contact Rate of Radio: NHK vs. Private



(Hoso Kenkyu to Chosa 2007)

Magazines were at their heyday in the 1980s, during which, in the biggest years, there were as many as 245 startup magazines. The number of published magazines has decreased since. During the 1990s, more than a third of the magazines published were *manga*, or comic books. The amount of published magazines in general as well as manga has decreased in 2000s because of Internet and mobile communication. Still, out of ten magazines that have more than a million in circulations, eight are manga magazines. (Fujitake 2005.)

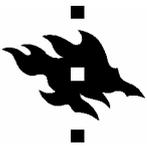
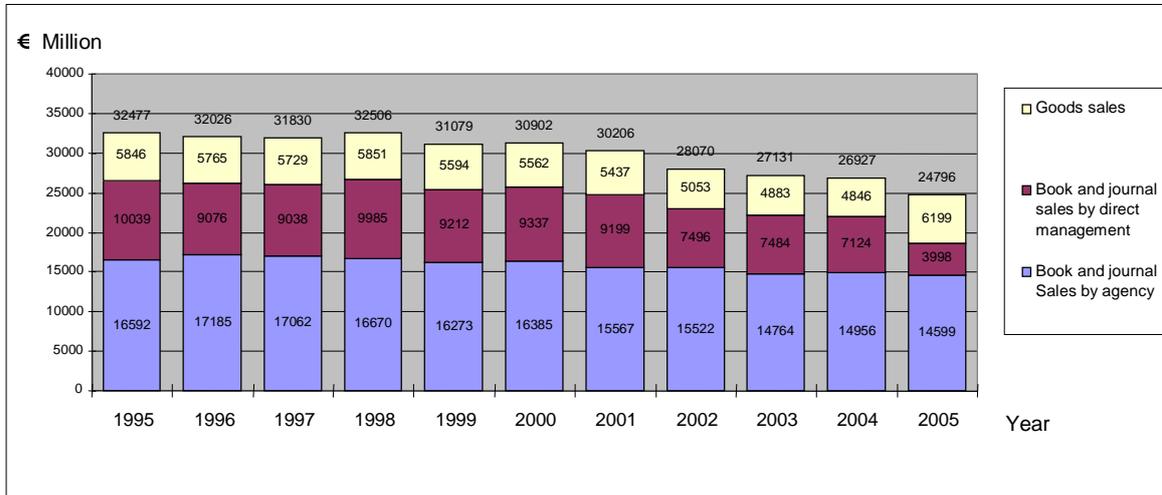


Chart 1.3. *Print Sales*



(Joho Media Hakusho 2007, 44)

Other large genres of magazines include women's magazines and general weekly magazines. The scope and variety of women's magazines segmented to different age groups and life styles is unimaginably diverse. Table 1.4. gives one way of categorizing the magazines that were published in 1970 and in 2000. The table demonstrates the explosion in the amount of magazines and the development of segmentation in the women's magazine business.

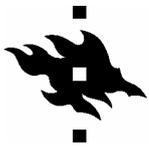


Table 1.4. Segments of Journals for Women (1970s-2000s)

1970		2000			
		9-14 years old	<i>Pichi Lemon</i> <i>Love Very</i> <i>CANDy</i>	<i>Nicola</i> <i>Melon</i> <i>Hanachu</i>	
15-17 years old	<i>SEVENTEEN mc Sister</i> <i>Puti Seven</i>	15-17 years old	<i>SEVENTEEN</i> <i>junie</i>	<i>CUTiE</i>	
		18-20 years old	<i>Popteen</i> <i>pastel sister</i> <i>Cawaii!</i> <i>Egosystem</i> <i>JJ bis</i>	<i>Elteen</i> <i>egg</i> <i>Ranzuki</i> <i>teengirl</i>	
18-22 years old	<i>an/an</i> <i>non-no</i>	18-22 years old basic Casual	<i>JJ</i> <i>ViVi</i> <i>non-no</i> <i>Fine</i> <i>SEDA</i> <i>Zipper</i> <i>Spring</i> <i>KERA</i> <i>Happie nuts</i> <i>MORE</i> <i>with</i> <i>ef</i>	<i>CamCam</i> <i>Ray</i> <i>S cawaii!</i> <i>mina</i> <i>JILLE</i> <i>Soup. PS</i> <i>PINKY</i> <i>mini</i>	
23-26 years old	<i>MORE</i> <i>Croissant</i>	23-26 years old	<i>MORE</i> <i>with</i> <i>ef</i>	<i>LUCi</i> <i>Vantaine</i>	<i>an/an</i> <i>Hanako</i> <i>CREA</i> <i>FRaU</i>
Mrs	<i>Shufu no Tomo</i> <i>Fujin Kurabu</i> <i>Shufu to Seikatsu</i> <i>Fujin Seikatsu</i>	25-29 years old	<i>Oggi</i> <i>BAILA</i> <i>Style</i> <i>25ans</i> <i>GLAMOROUS</i>	<i>MISS</i> <i>GINZA</i> <i>Sweet</i> <i>BLENDA</i> <i>CLASSY.</i>	
		27-35 years old	<i>BOAO</i> <i>NIKITA</i> <i>Colorful</i>		
		thirties	fashion	<i>VERY</i> <i>30ANS</i> <i>GRAZIA</i>	<i>DOMANI</i> <i>inRed</i> <i>GLITTER</i>
	young mrs		<i>LEE</i> <i>Como</i>		
	Information for home economics		<i>Orange Page</i> <i>Lettuce Club</i> <i>saita</i> <i>Shufu no Tomo</i> <i>ESSE</i>	<i>Thank you!</i> <i>Bage!</i> <i>Mart</i> <i>Sutekina Okusan</i> <i>Ohayo Okusan</i>	
			over forties	<i>Maple</i> <i>my 40s</i> <i>Yuyu</i> <i>Fujin Koron</i>	
Fashion			<i>STORY</i>	<i>Precious</i>	
		Mrs	<i>Fujin Garo</i> <i>Katei Gaho</i> <i>Mrs</i>	<i>Kurashi no Techo</i> <i>Fujin no Tomo</i> <i>Waraku</i>	

(Fujitake 2005, 165)



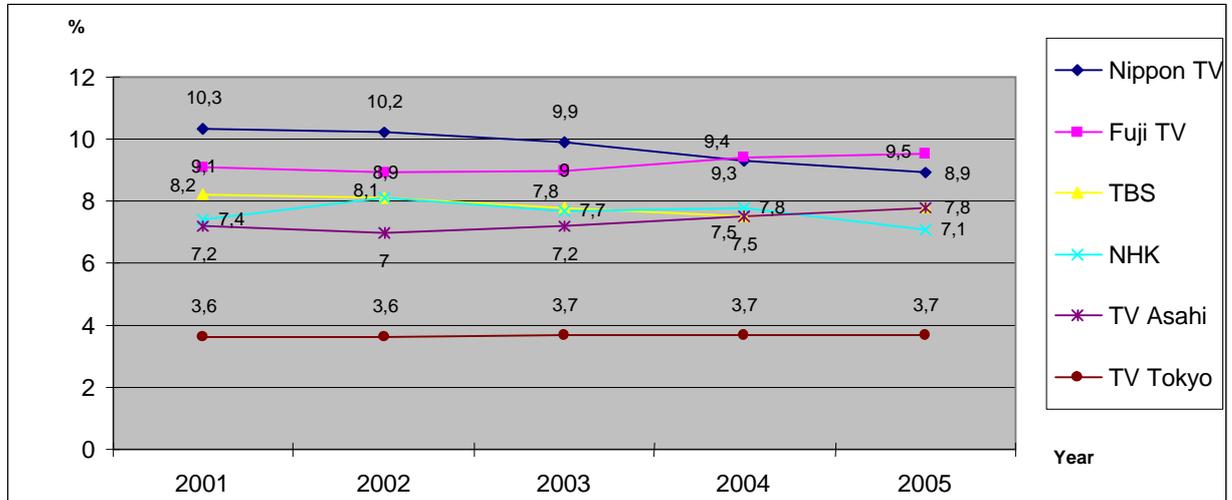
Public service and competing private networks exist side by side in the Japanese television system, which was formed after the Second World War. US occupation forces had a strong influence on the outcome. Already before the war, Japan had an established (radio) broadcasting tradition and its own public service system, Nippon Hoso Kyokai, NHK (Japan Broadcasting Corporation). The General Head Quarters (GHQ) and supreme commander General McArthur decided during the occupation that the monopoly of NHK was to be maintained for economical reasons, but also because a nationwide broadcasting network was very useful for the occupation, as it was easy to control and sensor. (Luther & Boyd 1997, Valaskivi K. 1999.)

Regular television broadcastings began in 1953 almost simultaneously by the public broadcaster and the first commercial company Nippon Television Network Corporation (Nihon Terebi).

Currently NHK operates five television channels and three radio services. General TV and Educational TV are broadcast terrestrially. There are also three satellite channels: BS-hi, BS-1 and BS-2. Internationally, NHK offers three TV and radio services under the NHK WORLD umbrella. News is provided in 22 languages on the radio and over the Internet. NHK has 54 stations across Japan and correspondents in 33 locations around the world.

The founding of commercial television broadcasting in the 1950s happened mainly through the initiative of newspaper companies. Currently the largest nationwide newspaper, Yomiuri Shimbun funds the NNN corporate group, a television network with 30 broadcasting stations and Nippon Television (NTV) as the largest station of the network. NTV is the second largest television company (in terms of audience ratings and advertising revenue) in Japan. Mainichi Shimbun is affiliated with the JNN network with 28 broadcasting stations. Tokyo Broadcasting System (TBS) is the main station. Sankei Shimbun's network is FNN, with 28 stations and Japan's largest commercial television station Fuji Television as the main broadcaster in the network. TV Asahi is the main broadcasting station of ANN corporate group, which has 26 stations, and is affiliated with the second largest newspaper Asahi Shimbun. The Nihon Keizai Shimbun funds TXN corporate group with six broadcasting stations headed by TV Tokyo. (Fujitake 2005.)

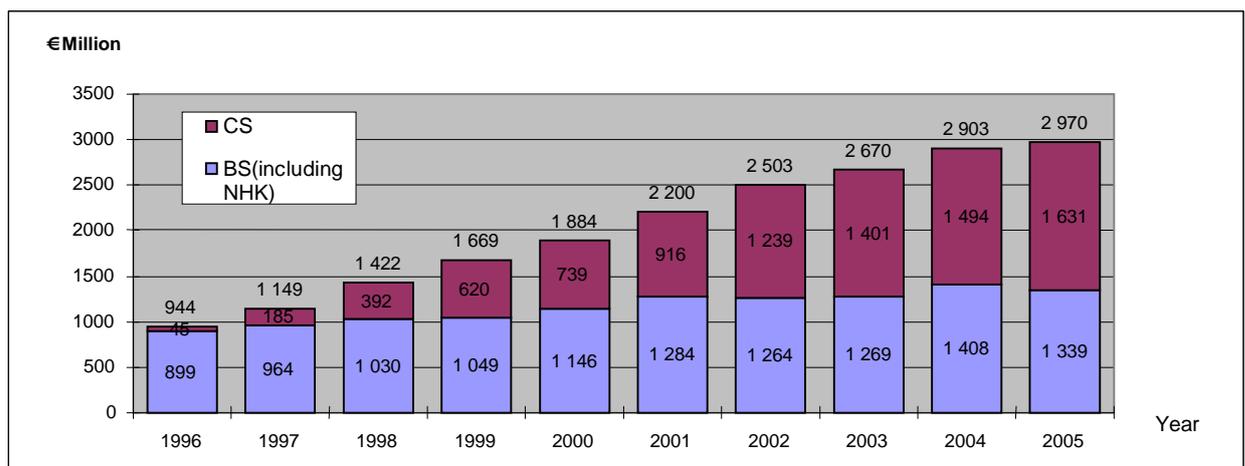
Chart 1.4. Daily Contact Rate of Television: NHK vs. Commercial Channels



(Joho Media Hakusho 2007, 131)

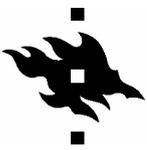
Satellite has made it in Japan slowly. Growth of satellite penetration has been disappointing for the industry, but in recent years, its popularity has grown steadily. Currently there are six companies providing satellite services. Both broadcast satellites (BC) and communication satellite (CS) are available. CS has especially grown in recent years (see Chart 1.5.) and the digitalization of television is expected to boost the growth even more. (Valaskivi J. 2004)

Chart 1.5. Market Volume of Satellite Broadcasting (BS/CS)



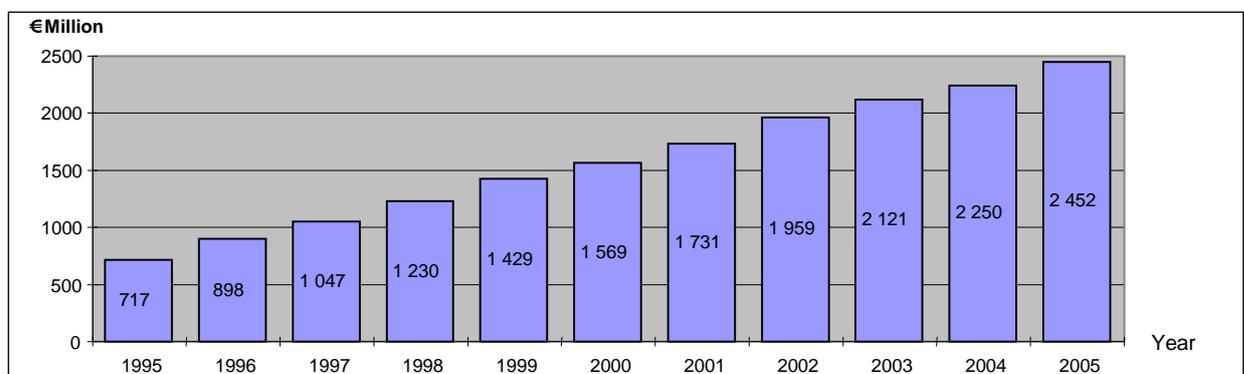
(Joho Media Hakusho 2007, 134)

Cable penetration is in 30 percent of households and growing steadily. Cable television had already started in Japan by 1955 in order to provide television services to those areas where broadcasting did



not yet reach. Cable companies were small until 1993, when restrictions of cable business were lifted and foreign ownership was allowed. Cable companies began to network, merge and make program exchange contracts. Cable licenses are issued by MIC. There are more than 500 cable operators in Japan with their own production and more than 15 million households as their customers. There is public funding invested, along with the private ownership, in 70 % of the cable companies. Often the municipalities invest in cable communication to ensure an information channel in case of crises. Local cable channels for citizen participation in Japan are numerous. (Valaskivi J. 2004)

Chart 1.6. *Income of Cable Television*

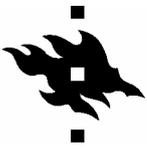


(Joho Media Hakusho 2007, 140)

Digitalization of television began relatively late. Digital terrestrial broadcasting was launched in December 2003 in the Tokyo, Osaka and Nagoya metropolitan areas and expanded to all major cities by the end of 2006. Analogue terrestrial broadcastings will be terminated in 2011. In theory, the technology is now in place for 98 percent of the viewers to receive digital broadcasting. However, the amount of digital receivers has not grown very fast yet. Japan uses its own technological standard (Integrated Services Digital Broadcasting, ISDB) for digitalization.

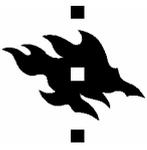
HDTV, or High Definition Television had been developed in Japan by NHK since the 1960s, and NHK began broadcasting programs in HD-format first on the analogue BS channel and then on digital BS. Currently about 80 percent of NHK's general programming is broadcasted in HDTV format. Digital terrestrial broadcasting is now widening the usage of HDTV format. (Valaskivi J. 2004)

Along with the digitalization of television has come the mobile television "One-Segu". One-Segu is an abbreviation of the term "one segment", meaning that one segment of digital broadcasting has



been reserved for mobile broadcastings. Both the national broadcasting corporation NHK and all the major commercial television broadcasters are now broadcasting full programming simultaneously to both fixed television and mobile devices. (See Chapter 1.5.)

The picture illustrating the development of media history in Japan on the next page depicts this development from several different points of view, including telecommunication and mobile technology.



1.3. Media policy and national strategies

In Japan, three ministries are involved in media regulation and policy decisions.

The Ministry of Education, Culture, Sports, Science and Technology (MEXT) is responsible for basic research and educational funding, science and technology policies as well as research and development. MEXT is also responsible for intellectual property rights and possible support for contents production.

The Ministry of Trade, Economy and Industry (METI) is responsible for technological standards and commerce related to media and media technologies.

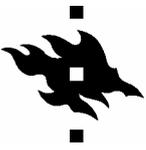
The Ministry of Internal Affairs and Communication (MIC) regulates the radio frequencies, issues licenses for radio, and regulates both broadcasting and telecommunication. These are all defined in different laws, while broadcasting frequencies are regulated tightly. The Telecommunications Business Dispute Settlement Commission also works within the MIC.

Media is regulated by the following laws in Japan (Hamada 2003, 1, 5):

- Article 21 of the Constitution provides the explicit protection of freedom of speech and free press by stating that freedom of “speech, press and all other forms of expression” are guaranteed.
- Radio Act prescribes the procedure of the licensing system
- The Broadcasting Act regulates the content and structure of broadcasting

Telecommunications are traditionally considered to be outside of the scope of the media law, since the telecommunications operator has been considered simply a carrier with no relation to the carried content. There is, however, a wide range of administrative laws and economic regulations that also involve the telecommunications industry. Because of the changes in the industry, Ministry of Posts and Telecommunications (currently MIC) created in the 1990s the new concept of “telecommunication service with public character” to distinguish content services from plain telephone service and to subject telecommunication to certain regulations, particularly to protect minors. (Hamada 2003, 8)

The laws are currently under revision negotiations because of technological convergence and changes in the market. The changes lead to a situation where the technological difference between



broadcasting and telecommunication is flattened out, and new approaches to the definitions behind current laws become necessary. The revision of the law is expected around 2011.

U-Japan strategy reaches for the future

MIC is also responsible for the Ubiquitous Japan (u-Japan) strategy formulated in 2004 to continue the previous Japanese information society strategy (e-Japan). The aim of the u-Japan strategy is to “make Japan the world’s most advanced IT nation”. The strategy reaches up into the year 2010 and aims mostly at developing wireless infrastructure so that exchange of information would be possible anytime, anywhere and from any appliance. In a technological sense, the question here is of convergence of telecommunication, mobile technology, broadband and digital broadcasting, as well as the development of sensor technologies.

The ubiquitous strategy project itself has ambitious and futuristic visions of how ubiquitous technology will change everyday life in the future¹. In addition to technology, the strategy aims at developing applications and supporting citizen’s possibilities for usage of new technology. In practice, most of the visions are already realized: mobile phones with television broadcastings, mobile browsing of the Internet, mobile phones as credit cards, etc.

Reaching the strategical targets of the u-Japan strategy are made easier with the penetration of Internet-compatible mobile phones (currently about 90 percent) and by the cheapest broadband providers in the world. Half of the Internet-compatible mobile phones currently used are 3G.

The u-Japan strategy points the direction for research and development and has an influence on what kind of research is funded in the media and communication field. For instance, since the strategy emphasizes citizen’s abilities to utilize media technology, projects in media literacy and education on media usage are considered important and are also focused on increasingly in research. Worries about digital divide are also central in the u-Japan development strategy, and research projects involving digital divide and possible ways of diminishing it are underway both in private research institutes (e.g. KDDI research institute) and in universities.

¹ MIC has a website in English introducing different aspects of u-Japan (http://www.soumu.go.jp/menu_02/ict/u-japan_en/). The website has short films presenting people in different situations in u-Japan and shows how the technology can help them in these situations (http://www.soumu.go.jp/menu_02/ict/u-japan_en/j_r-menu_u.html)



Intellectual property rights under negotiation

Convergence of telecommunication and broadcasting has brought up new issues in intellectual property rights, and the industry is calling for changes in the laws. Currently the law on intellectual property rights treats broadcasting and telecommunication differently, which has led to a situation where companies providing on-demand content services through broadband have been forced to obtain permissions from each copyright holder individually, while in broadcasting the television companies mostly are the IP-rights holders.

A committee has been negotiating the issue since 2005. One solution being discussed has been to give broadband providers the same rights as cable television providers, giving them the right to distribute the program contents simultaneously in cable and broadband. This solution would leave open issues of on-demand distribution in broadband and mobile television. There are hopes that these issues would also be solved by 2011 when the analogue television broadcastings are terminated. (EF, Tokyo 2007.)

1.4. Current trends in media markets

Japan's advertising industry is second largest in the world. In addition, the largest advertising agency in the world, Dentsu, is Japanese. The largest media related companies in Japan are advertising agencies, not including the telecommunication and mobile sector.

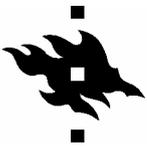
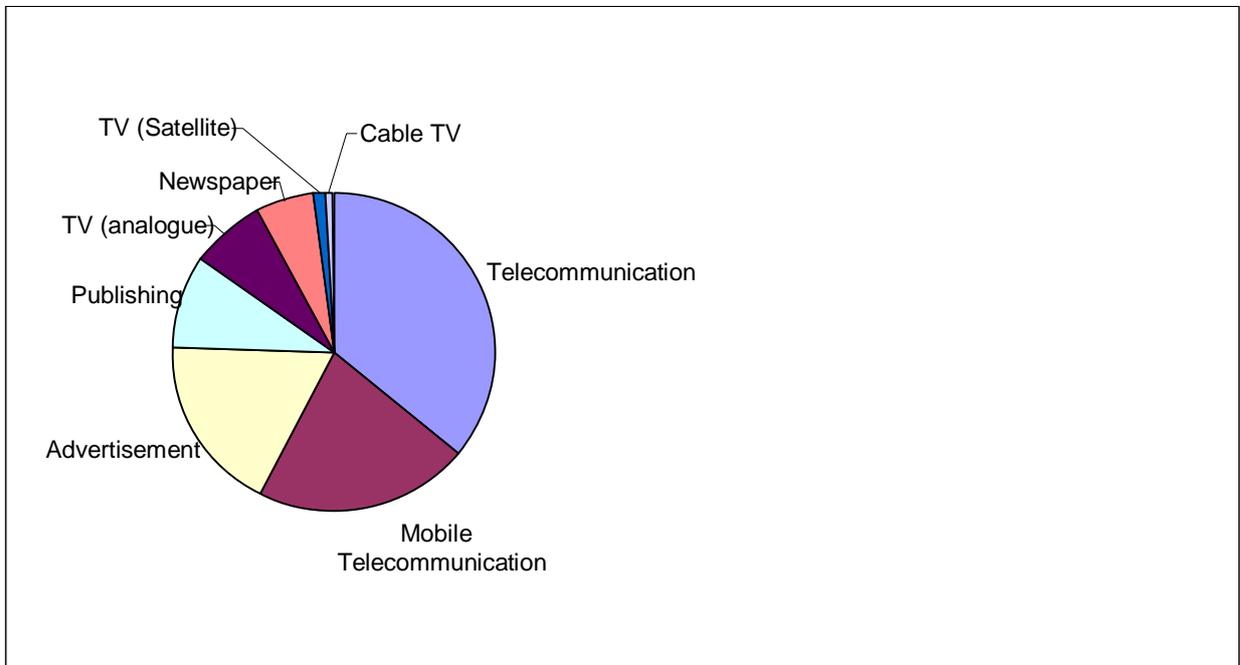


Chart 1.7. Shares of Mass Media Market by Sector (2005)



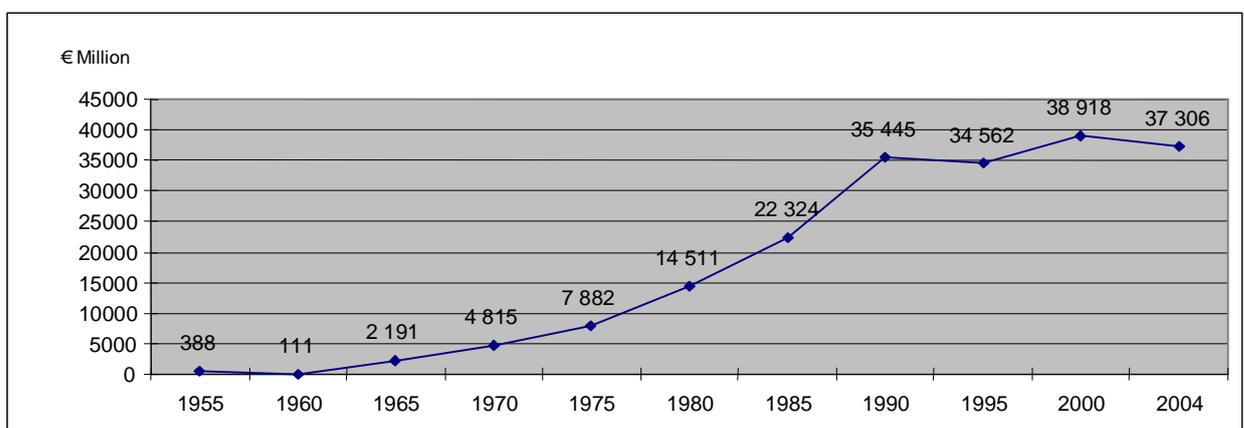
Telecommunication	95 269
mobile telecommunication	57 030
advertisement	47 999
publishing	24 796
TV (analogue)	19 378
newspaper	15 410
TV (Satellite)	2 970
Cable TV	2 452

(€ Million)

(Joho Media Hakusho 2007)

Advertising expenditure has been growing for years and has now stabilized.

Chart 1.8. Advertising Expenditure in Japan



(Fujitake 2005, 176; based on data of *Nihon no kokokuhi*)



Television still strongest, but facing change

The Japanese media markets are still dominated by television. Both in terms of viewing time and in advertising revenue, television is by far the strongest player on the Japanese markets.

NHK's funding is mainly composed of license fees to its terrestrial and satellite services and is supplemented by income from various subsidiary companies. NHK collects the license fees itself. Until recently there have been no sanctions for leaving the license unpaid, but the situation has changed and a fine has been introduced.

Like many other public broadcasters in different parts of the world, NHK has also encountered changes and the need to restructure itself in recent years because of changes in the media markets and demographic structure. NHK has encountered difficulties from many directions, including credibility problems because of scandals involving news production and political involvement with NHK's journalistic contents. Because of technological changes such as digitalization, NHK is also facing financial difficulties and is currently under a strict financial cut plan. Until recently NHK had about 12 000 employees, but under its renewal program in 2006 – 2008, it aims to reduce the number of employees by 10 %, or 1200 employees by the end of fiscal year 2008.

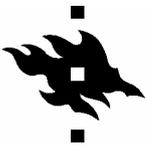
Of the commercial broadcasters, Fuji Television dominates the market in terms of advertising revenue and viewership. Nevertheless, Nippon Television and TBS are doing considerably well also. Recently, there have been changes in the ownership structures of the companies. For instance, TBS has been experiencing take-over attempts by the Internet company Rakuten. This has been seen as an indication of Internet business corporations' attempts to move into the broadcasting business.

Table 1.5. *Largest television companies by turnover (unit: million, 1€ = 157 yen)*

		2002	2003	2004	2005	2006
1	Fuji Television Network	2 165	2 125	2 280	2 395	2 430
2	Nippon Television Network	1 983	1 914	1 849	1 892	1 833
3	Tokyo Broadcasting System (TBS)	1 711	1 640	1 634	1 675	1 692
4	TV Asahi	1 287	1 224	1 256	1 390	1 425
5	TV Tokyo	643	619	632	680	690

(Joho Media Hakusho 2005, 2006, 2007)

Commercial television companies have, in most cases, defined themselves as content production companies who aim at producing contents for different distribution channels. For instance, Fuji Television is actively developing new business opportunities in the Internet and mobile world. Fuji

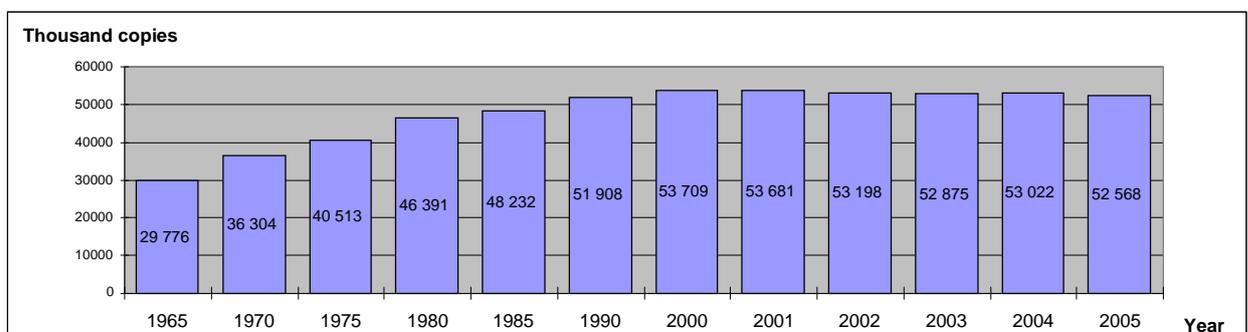


started on-demand television broadcastings over the Internet in 2005 and is charging 294 yen/month (less than 2 Euro) for subscription. So far, there are 22 programs of different genres available in the service that is managed through service providers.

Newspapers and publishing hanging in there

Japanese are among the most eager readers of newspapers in the world. Thus, the circulation of dailies has not yet been severely influenced by the increase of Internet usage.

Chart 1.9. *Circulation of Dailies*

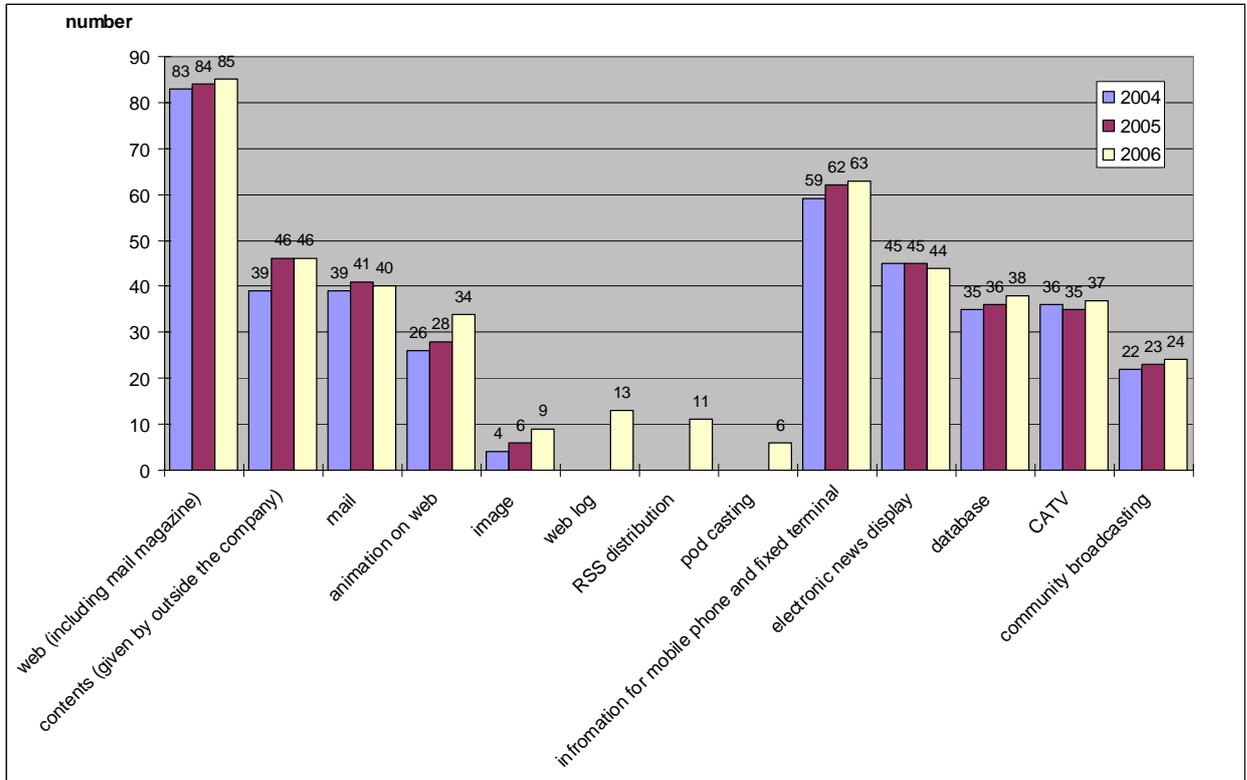


(Joho Media Hakusho 2007, 30)

While the circulation has remained more or less steady for newspapers, the publishing sector has been hit by the development of the Internet. Perhaps because the change has been slow for newspapers, they have also been slow to enter the Internet world and to attempt to create business models there. Newspapers have Internet editions as additional services and provide fast news distribution through the Internet, mainly funded by advertising. They also have tried developing pay services, such as opening archives for on-demand services, which make researchers happy, but does not attract large audiences. Nikkei is one of the rare newspaper companies with an Internet strategy and subscription fees for Internet service, also available in English (<http://www.nni.nikkei.co.jp/>).

Magazines, on the other hand, have been quite active in entering the Internet. Some, like the Digital Ef (www.pasomaga.com/ef), have cancelled printing altogether and shifted publishing to the Internet. The Internet versions look like real magazines with turning pages and full-page pictures. Digital Ef funds publishing with both subscriber fees and advertisements. In addition, there are also free Internet magazines that base their income on advertising. About 10 – 20 magazines have moved to Internet in this way.

Chart 1.10. *Number of Newspapers and Magazines on the Internet (by type)*



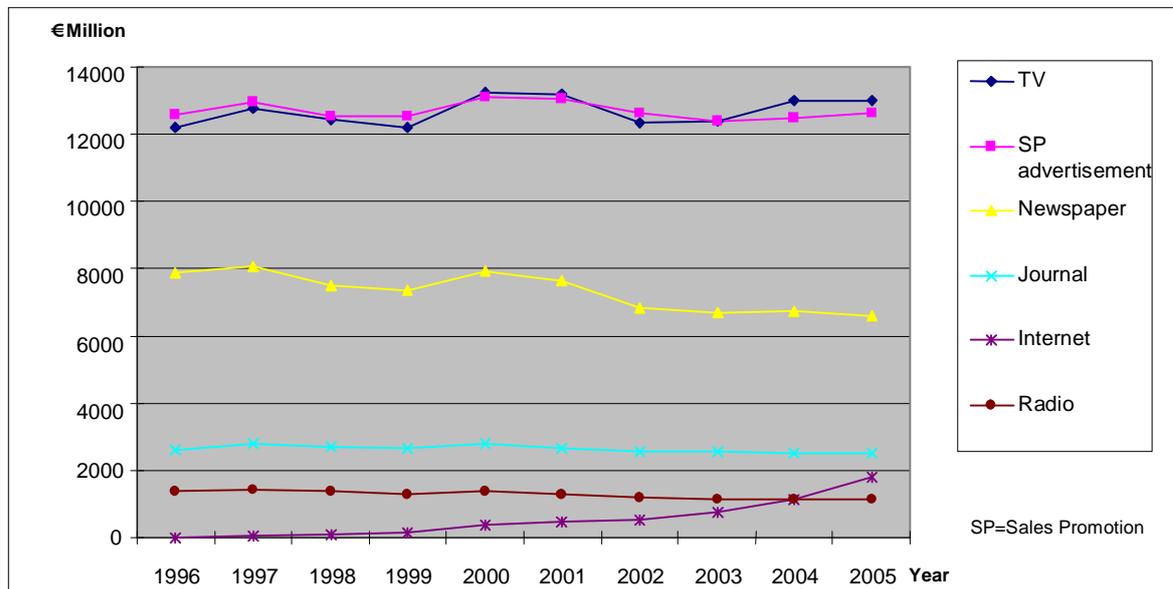
(Joho Media Hakusho 2005, 2006, 2007)

Business models and advertising in a time of new media

The advertising market in Japan is controlled by two major advertising agencies, Dentsu and Hakuhodo. Almost all sales of advertising space in the mass media is sold and bought through these agencies which are also the major producers of advertising contents and as well as being producers of television programs. Their relationship with television is strong, such that should the position of television change in the media markets, the advertising agencies will also experience trouble in gaining revenues. The world of the Internet is a challenge in this sense, because advertising on the Internet is still small, and advertising space there in most cases is cheap.

However, the Internet is growing, also as an advertising medium, and new business models are being sought. Already in 2004, the Internet surpassed radio in advertising income (see Chart 1.11.)

Chart 1.11. Advertising Revenue by Media



(Joho Media Hakusho 2007, 197)

The digitalization of television, and at this stage especially the mobile television, has brought new issues onto the table. Advertising agencies and service providers are eagerly seeking new business models to provide enough revenue in the changing environment. The biggest pressure comes to programming and to the basic question of “how to produce better programs”. Currently advertising agencies in Japan are building dramas with commercials inserted into the drama plotline or making advertisements themselves into dramas or short films. In addition, advertising with moving visual images on the Internet is developing fast.

Another factor bringing changes to the current logics of earning are the so-called social network media and Web 2.0. The question from the point of view of business is how to control and gain possibilities to earn money in these new media.

Telecommunication driving change

According to some estimation, the Japanese telecommunication development and mobile market is the international leader at the moment. There are estimations that evaluate Japan as being 2 - 4 years ahead of Europe in the mobile market. (Fasol 2007.) Japanese own more than 100 million mobile phones, and the market is still growing. There are three major mobile operators: NTT DoCoMo, KDDI and Softbank, who bought over Vodafone last year. There are also two newer operators: E-



Mobile and IPMobile, which are struggling financially. IPMobile was recently bought by the real estate developer giant Mori Trust Co., and is thus likely to survive.

The Japanese mobile markets are dominated by the operators, which has led to relatively high prices. Mobile phones are sold by the operators with package prices. Usually the phone is “free” and the usage fees difficult to understand. New approaches to the matter are sought, and it is possible that operators will have to come up with prices for phones and make visible the real operating costs. The operators are against this but have already started to prepare and increase possibilities in contract length and expenses (EF, Tokyo 2007).

Competition between operators is tightening because of the increase of operators and the new possibility to transfer the phone number when changing operators. However, the competition is not fierce, and rather than into price cuts, has led to new variations in the services operators provide. Mobile music, mobile wallet or credit card and mobile television have caught on fast. Already there are almost 25 million phones with e-wallet compatibility and the amount might increase into 40 million within a year. The operators have also made deals with free Internet portals such as Yahoo, which has led to decreasing popularity of NTT DoCoMo’s I-Mode service (EF, Tokyo 2007).

Table 1.6. Largest Internet companies by turnover (unit: million, 1€ = 157 yen)

		2003	2004	2005	2006
1	Yahoo Japan	376	483	684	984
2	USEN	---	---	596	---
3	NIFTY	431	423	420	435
4	eAccess	129	243	369	384
5	ACCA Networks	198	246	259	---
6	Internet Initiative Japan	---	---	215	239
7	So-net	247	228	224	228
8	Rakuten	115	136	214	---
9	Plala Networks	76	103	141	175
10	@NetHome	63	74	74	---

(Joho Media Hakusho 2005, 2006, 2007)

The spreading of broadband has been a major focus of the Japanese information society strategies for almost ten years. Now broadband usage is growing at a steady pace, but instead of a growth in DSL usage, optical fiber has gained more popularity. This is because Japanese consumers are eager for the high speed of broadband, and in densely populated city areas, optical fiber is relatively cheap. Broadband prices in Japan are the cheapest in the world. Currently more than one third of broadband subscribers have the optical fiber. (See Chart 1.12.)

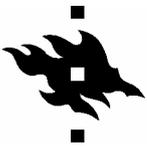
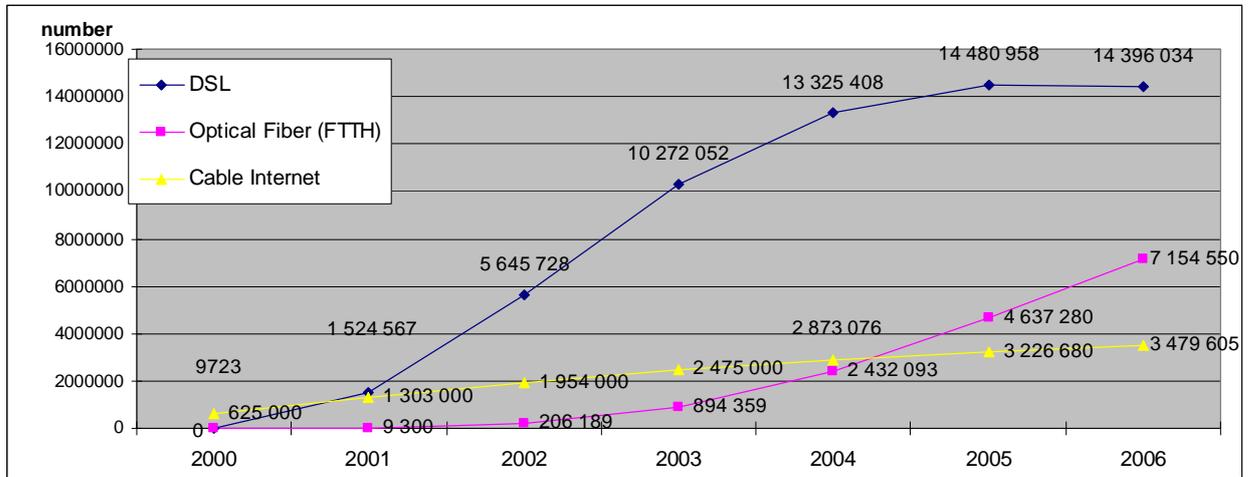


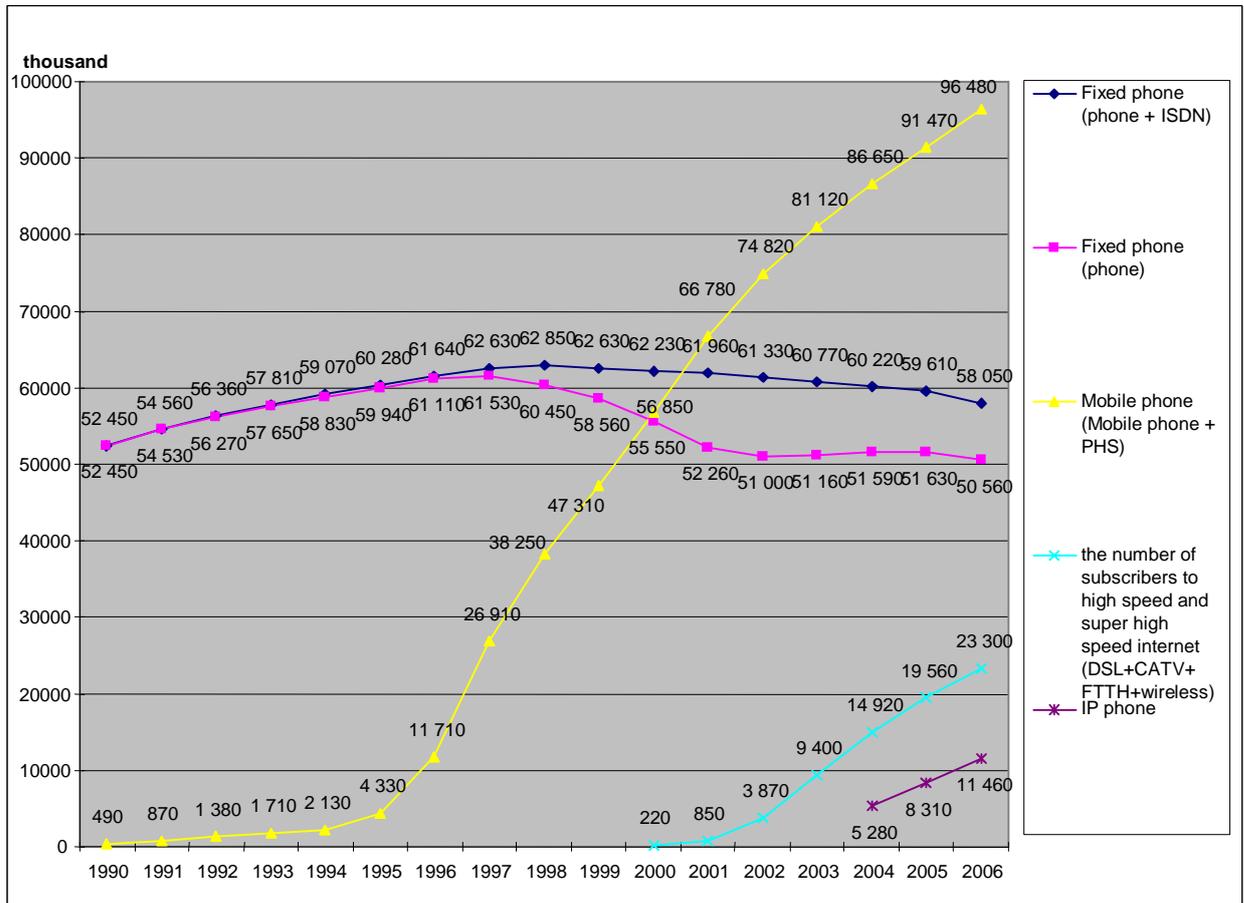
Chart 1.12. Number of Broadband Subscribers



(MIC 2006)

Fixed phone lines are quickly losing popularity, and mobile phone usage surpassed fixed lines by 2001. Now the number of subscribers to high speed and super high speed Internet and IP phones are growing. (See Chart 1.13.)

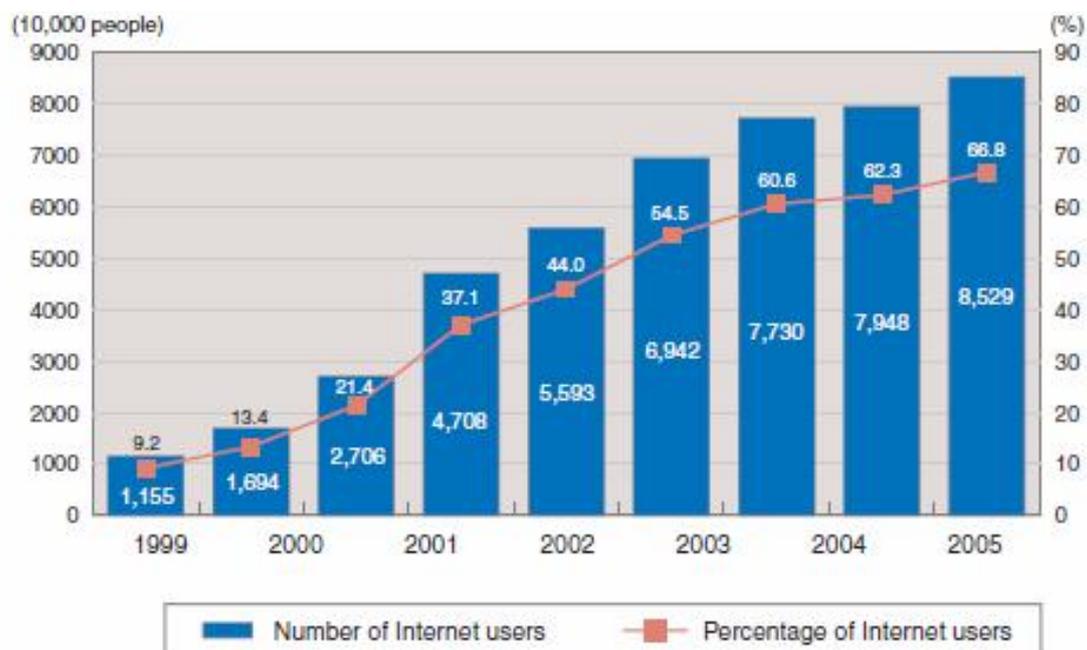
Chart 1.13. Number of Subscribers: Fixed Communication and Mobile Communication



(MIC 2006)

The amount of Internet users is steadily growing, in line with the government desires. The biggest challenges are for the elderly, for whom the u-Japan strategy has tried to provide new services through telecommunication and the Internet. Thus, projects of accessibility, universal design and media literacy have become all the more important. The penetration rate of the Internet is steadily growing, but because the figures usually include both mobile Internet and fixed Internet usage, it is difficult to compare figures with other countries.

Picture 1.2. *Penetration Rate of the Internet*

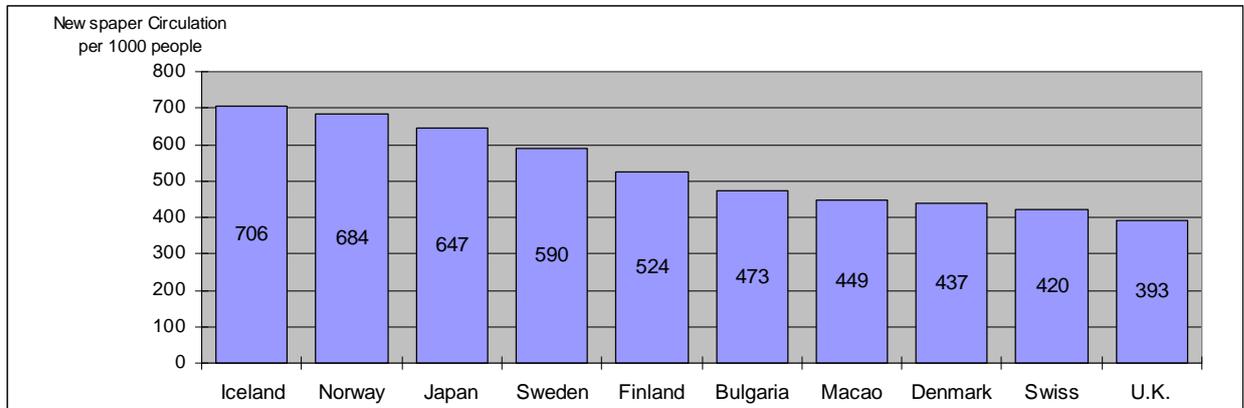


Produced from MIC, "Communications Usage Trend Survey"

1.5. Media content, reception and consumption

The Japanese – like the Finns – are among those nations who read the most newspapers. In both countries, the amount of published newspapers compared to the population is among the highest in the world (see Chart 1.14.)

Chart 1.14. Newspaper Readership in 10 Highest Ranking Countries



(Fujitake 2005, 23; based on World Press Trends, 2004)

However, in terms of the Japanese budgeting of time, newspapers lose to television, which still is well above any other media in terms of usage time. Television has lost just a little to the Internet in last few years. (See Table 1.7.)

Table 1.7. Average daily contact rate per media (minute)

	TV	Radio	Newspaper	Journal	Internet
1997	2h 57min	20min	17min	5min	5min
1998	2h 47min	19min	21min	5min	2min
1999	2h 52min	10min	24min	4min	3min
2000	3h 7min	17min	22min	6min	8min
2001	3h 7min	18min	21min	5min	12min
2002	3h 13min	17min	20min	5min	15min
2003	3h 12min	18min	21min	5min	19min
2004	3h 14min	17min	20min	5min	20min
2005	3h 10min	20min	19min	4min	23min

(Joho Media Hakusho 2007)

Table 1.8. shows how additional media consumption is divided in terms of time and how it has changed since 1997.

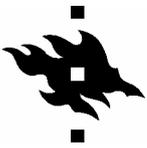


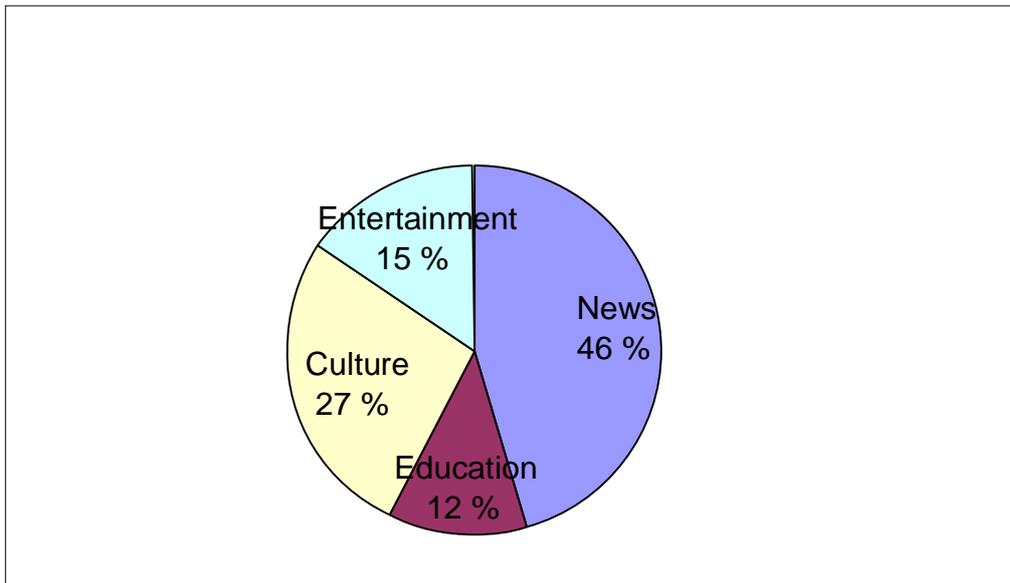
Table 1.8. *Time spent with mass media (minute)*

	1997	1998	1999	2000	2001	2002	2003	2004	2005
Music	---	0:10	0:09	0:08	0:08	0:07	0:07	0:07	0:07
Journal	0:05	0:05	0:04	0:06	0:05	0:05	0:05	0:04	0:04
Books	0:08	0:07	0:07	0:06	0:06	0:05	0:07	0:07	0:06
Newspaper	0:17	0:21	0:24	0:22	0:21	0:20	0:21	0:20	0:19
Radio	0:20	0:19	0:19	0:17	0:18	0:17	0:18	0:17	0:20
TV	2:57	2:47	2:52	3:07	3:07	3:13	3:12	3:14	3:10
VTR/DVD	0:05	0:05	0:05	0:05	0:05	0:06	0:07	0:07	0:08
Phone	0:05	0:05	0:05	0:07	0:06	0:05	0:05	0:04	0:04
Internet/ e-mail	0:05	0:02	0:03	0:08	0:12	0:15	0:19	0:20	0:23
TV Game	0:09	0:05	0:05	0:05	0:05	0:05	0:05	0:04	0:04

(Joho Media Hakusho 2007)

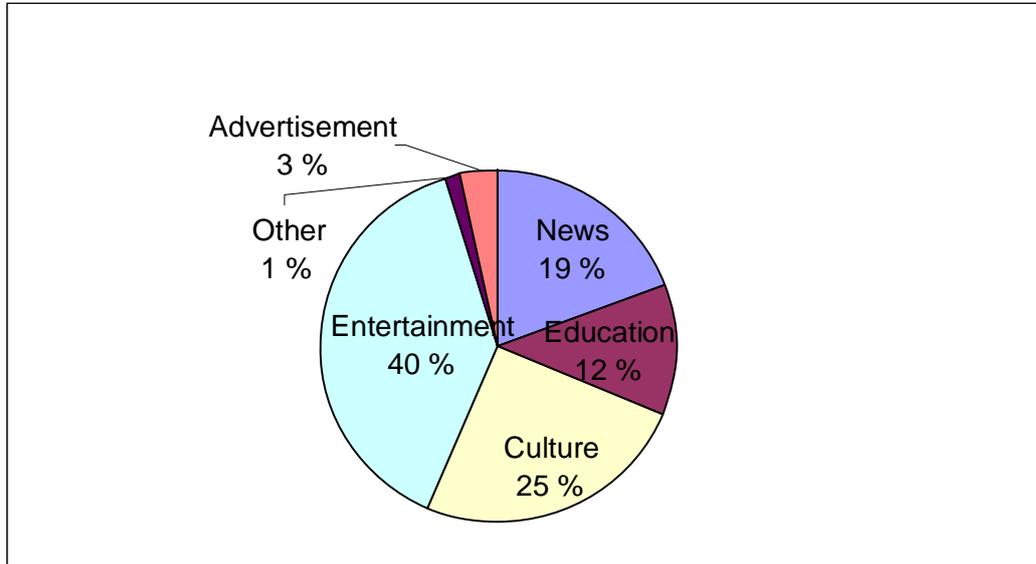
There is a significant difference in the contents of programming if we compare NHK and commercial television channels. This can be seen in Charts 1.15. and 1.16. Based on these figures, it is safe to say that the commercial channels focus on entertainment, while NHK focuses on news.

Chart 1.15. *Types of NHK Programs (per day)*



(Joho Media Hakusho 2007, 130)

Chart 1.16. *Types of Television Programs on Commercial Channels (per day)*



(Joho Media Hakusho 2007, 130)

Chart 1.17. shows a way of perceiving the relationship between genres provided and viewership. The chart shows that game shows are very popular, and disproportionately so. However, when comparing the ratings of the most popular channels and the nature of the programs that gather the biggest audience, there is no great difference among public service and commercial channels. Most popular programs are large events in sports or music, with an occasional drama and variety show in between, as seen in Table 1.9.

Table 1.9. *Top ten programs by channel*

NHK		%
1	The 56th NHK Kohaku Uta Gassen (music)	42,9
2	Shutoken News 845	35,5
3	NHK News Ohayo Nippon Torino Olympic Games	31,8
4	NHK News 9	27,2
5	NHK News 7	24,4
6	Yukutoshi Kurutoshi	24,2
7	Koumyo ga Tsuji (drama)	22,7
8	Osumo Harubasho Senshuraku (Sumo wrestling)	22,5

TV Asahi		%
1	Soccer 2006 FIFA World Cup Asia: (North Korea Vs. Japan)	43,4
2	News Station	27,5



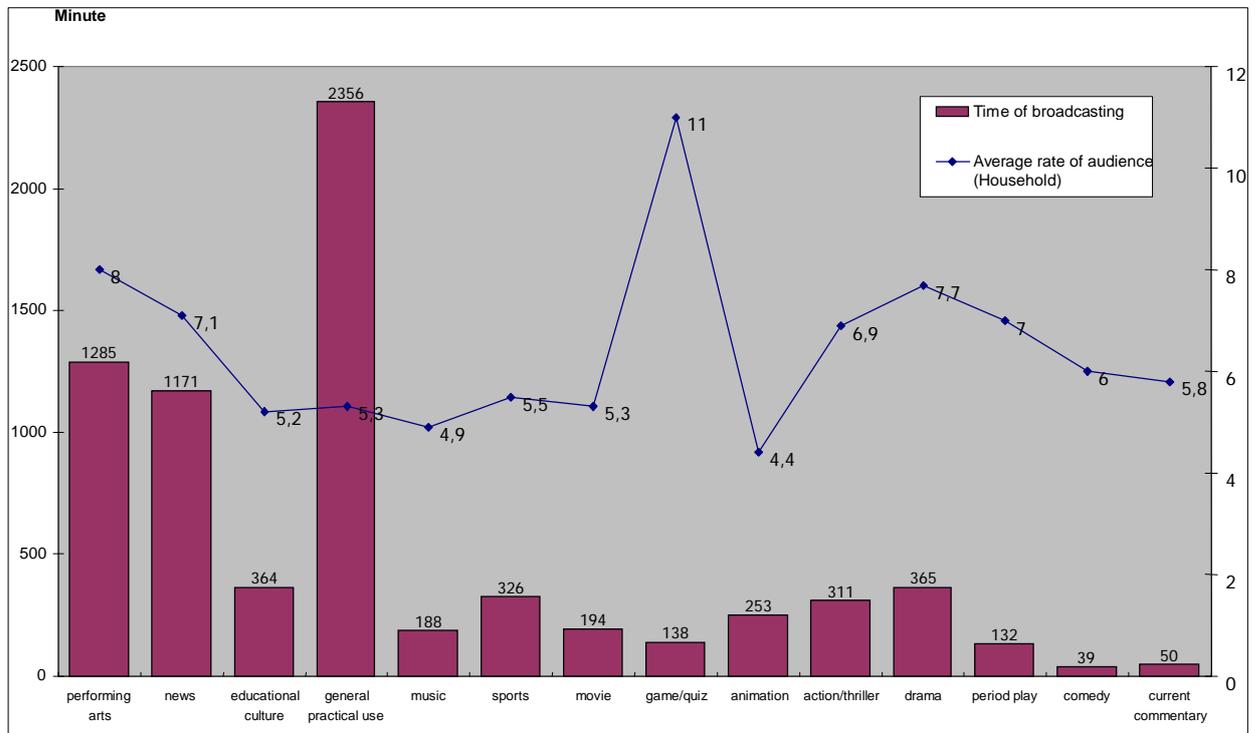
3	Soccer 2006 FIFA World Cup Asia: (Iran Vs. Japan)	26,0
3	Figure skating: the grand prix final of the world championships	26,0
5	Sunday Foreign-film Theater/ Special Plan/ TRICK Shinsaku Special	24,7
6	Soccer 2006 FIFA World Cup Asia: Bahrain Vs. Japan	23,8
7	2005 Tokyo International Women's Marathon	23,8

Fuji TV		%
1	2005 The All Japan Figure Skating Championships / Free (Women)	33,7
2	The New Year Drama Special/ Furuhashi Ninzaburo Final Last Dance	29,6
3	Saiyuki (drama) / The New Year SMAP Holiday Special!	29,2
4	2005 The All Japan Figure Skating Championship / Short program (Women)	27,2
5	The New Year Drama Special/ Furuhashi Ninzaburo Final Fair Killer	27,0
6	Premium stage/ Special plan/ Odoru Daisosasen: THE MOVIE 2 Kanzenban	26,7
7	SMAP X SMAP (variety show)	26,6
8	Thursday Drama Theater/ Densha Otoko/ The Last Episode	25,5
9	Engine (drama)	25,3
10	Kiseki Taiken! Unbelievable (A True Story in the World)	24,8

Nihon TV		%
1	2006 World Baseball Classic/ The Championship Game Japan VS. Cuba	43,4
2	Gyoretsu no Dekiru Horitsu Sodansho (Variety show/ the topic about the legal advice)	30,8
3	24-hour TV 28 Ai wa Chikyu wo Sukuu Part 10 (charity program)	30,3
4	The 82th Hakone Ekiden (Long-Distance Relay Road Race/ University Students)	29,1
5	The Wide (Information Program)	27,6
6	Jyo-o no Kyoushitsu (drama)/ the last episode	25,3
7	Gokusen Dosokai Special (Drama)	25,1
8	Shoten (Variety Show)	24,5
9	Urinari Geinojin Shako Dance Club Dai Fukkatsu! New Challenge Special 2005 Spring (Variety Show)	24,2
10	Sanma & SMAP! Beauty and Beast/ Christmas Special '05 (Variety Show)	23,4

TBS		%
1	2006 World Baseball Classic/ Japan VS Korea	36,2
2	Pro Boxing/ Kameda Koki Sekai Zenshoson/ The Second Stage	24,8
3	Zubari luwayo! (Fortune-telling, Kazuko Hosoki)	23,5
4	Nakai Masahiro no Kinyobi no Tsumatachi e (Variety Show)	22,6
5	Friday Drama/ Hanayori Dango/ The Last Episode	22,4

Chart 1.17. Breakdown of Total Viewing Time by Type of Program on an Average Day



(Joho Media Hakusho 2007, 130)

Mobile business trends: new contents have found eager users

Traditionally operators have only transmitted the messages, but are now aggressively moving also into the content markets. For instance, KDDI had established a department of Content & Media Business by 2004. There are already several products on the market.

All mobile operators are developing the virtual wallet or credit card phone, which make the mobile phone a paying device. All operators have their own systems, and the popularity of the virtual wallet is growing fast. Operators are also moving into the credit card and loan business, founding subsidiaries in the banking sector.

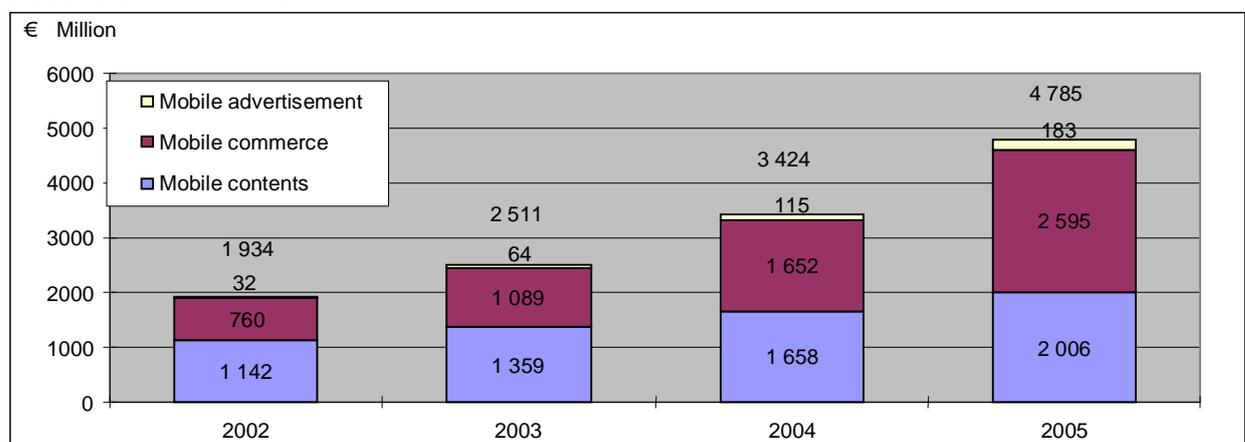
The mobile book market more than tripled from 2004 to 2005. The so-called *keitai shosetsu* or mobile novels are simple stories, targeted at young readers who need a pastime while waiting for or sitting on the train.

DC market is on the decrease and, at the same time, the online music download market is growing. It is still small, but growth is expected to be fast once it takes off. Mobile downloading of music has begun to grow since last year. In addition, other forms of download services are being developed.

For instance, KDDI's Lismo service provides data applications, films, music downloads and information, news services and ring tones, which function as music promotion for music makers.

Mobile Internet is more familiar than using Internet through the PC for the 15 – 20 year old age group. This group is familiar with multifunctional mobile equipment, and so the expansion of bandwidth of mobile phones together with discount price policies of operators might lead to a situation in which the mobile phone is enough and using the Internet with a computer becomes obsolete, unless for use with work or study.

Chart 1.18. Market Volume of Mobile Contents



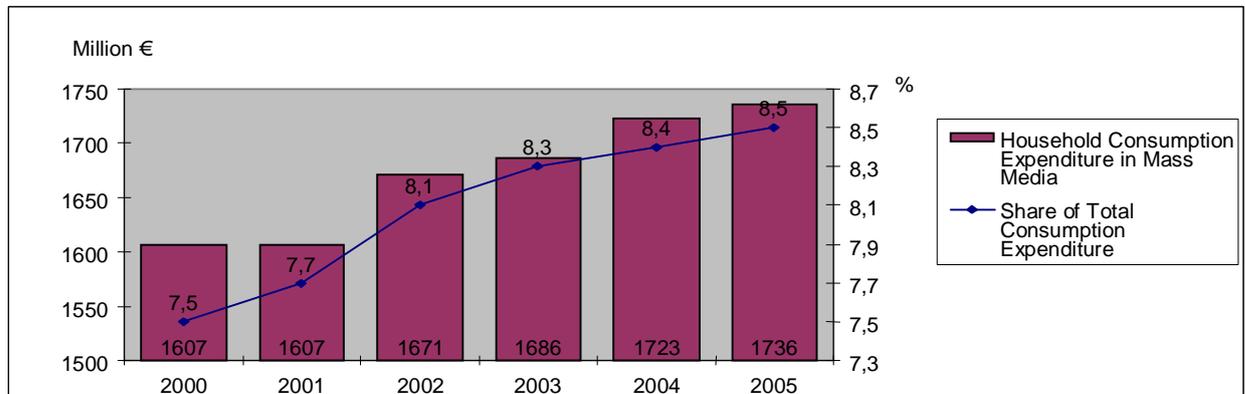
(Joho Media Hakusho 2007, 168)

As noted above, one segment of digital terrestrial broadcasting was reserved from the beginning for mobile broadcastings. NHK and major commercial broadcasters provide their programming on this One-Segu -service, making it possible for the Japanese to receive television programs into their mobile telephones. One-Segu also provides additional services, such as information on the programs and products advertised, weather information, news, event information etc.

Originally developers of the service predicted that One-Segu would be used during the long commuting hours of metropolitan areas. However, already it appears that because of the additional services, users use One-Segu also at home while watching television. This is because mobile phone provides the easy and handy connection to the Internet and makes it possible to click onto websites directly from the information provided. Television does not provide this possibility.

Media usage has become an integral part of everyday life. Because of all the new services, the expenses of media usage are growing. (See Chart 1.19.)

Chart 1.19. Household Consumption Expenditure in Mass Media and Share of Total Consumption Expenditure

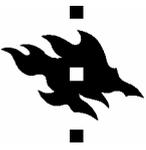


(Joho Media Hakusho 2007, 253)

The Japanese consumer values are studied at many institutions. The newest *seikatsu-sha* survey by HILL (see Chapter 2.6.) August 2006 indicates that the media and information related issues have a deep importance in the lives of the Japanese people. The study states that people still feel continuing unease about the future and have a desire for stability. They invest in their children's education and prepare for the future by consolidating three areas: 1) Rediscovering Japan 2) Men and women struggling together and 3) Working steadily. The Japanese are also rebuilding three areas: 1) Enhancing "information lives" 2) Cultivating consumer judgement and 3) Preemptively investing in the future. (HILL News 2006.)

1.6. Media industry associations

National Association of Commercial Broadcasters (NAB) (Nihon Minkan Hoso Renmei) membership consists of commercial broadcasters in Japan. The NAB was established as a voluntary organization in 1951 by 16 commercial radio companies that had been granted provisional licenses as the first commercial broadcasters. NAB is a public-interest corporation. It was officially issued its status as an incorporated association in 1952 by the Radio Regulatory Commission. All Japanese commercial radio and television broadcasters belong to the Association, including Broadcasting Satellite (BS) TV, Communication Satellite (CS) TV and Pulse Code Modulation (PCM) broadcasters, and currently there are about 200 members. The main tasks of the association are to set and guard the ethical codes of commercial broadcasters and to conduct research and surveys on themes relevant for commercial broadcasting. It publishes research reports and statistics, including the annual *Japan Commercial Broadcasting Yearbook* (in Japanese). The association has a research unit



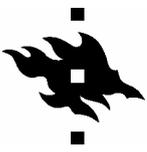
with six staff members, who conduct research on the audience, the international trends of broadcasting and media, and the media markets.

The Japan Newspaper Publishers and Editors Association (Nihon Shimbun Kyokai) was established in 1946 to encourage freedom of speech, to elevate ethical standards in reporting and to also protect and promote the media's common interests. It has 143 members, including 108 daily newspapers, 4 news agencies and 31 broadcasters. There are 120 full-time staff members working in the association, of which 20 are based in Yokohama at the Newspaper Museum.

In addition to maintenance and elevation of ethical standards in publishing and journalism, the association conducts surveys and research regarding newspapers, news agencies and broadcasting. Until the 1990s, there was a separate research department at the association. As the findings of the department often proved to be controversial, the department was merged with other functions at the association. Nowadays surveys are conducted either in-house or commissioned to think tanks or research companies outside.

The association does not collaborate with universities in research, but it does have members, who have university affiliation, or staff members, who move to university teaching after retiring from the association. NSK publishes materials related to mass media. The publications report development at the association and the newspaper industry. Publications include *Shimbun kyokai-ho*, a weekly tabloid-sized newspaper on the association news; *Shimbun kenkyu* (Newspaper Studies), which is a monthly magazine mainly focusing on editorial issues; *Shimbun keiei* (Newspaper Management), a quarterly discussing newspaper management; *Shimbun gijutsu* (Newspaper Techniques), a quarterly devoted to newspaper production technology; *Shimbun kokoku-ho*, a monthly newsletter on newspaper advertising; *Shimbun nenkan*, a yearbook containing information on newspapers, broadcasters and news agencies; and *Databook*, which is an annual handbook containing facts and figures of the Japanese newspaper industry. All of the publications are in Japanese.

Besides the periodicals, the association publishes several specialized books on newspapers. The website carries a monthly [NSK News Bulletin Online](#) (in English) which provides the latest information about the Japanese media situation.



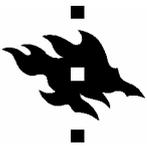
2 Research institutions and organizations

Media and communication research as an academic discipline in universities is still mostly to be established in Japan. Considering the vastness of the media industry in Japan, or even the amount of research done in private organizations, the volume of academic research is quite modest, as is the number of doctoral degrees in the field. There are only a few departments of journalism, media studies or communication in universities in the entire country, and they are mainly in private universities. Academic research on media is being conducted in various “research rooms” (*kenkyushitsu*), institutes and graduate schools. In many cases faculty members interested in the media work at departments of sociology, political studies, economics, psychology, informatics, anthropology, literature or philosophy, rather than having a department focusing exclusively on media and communication.

Because of the scattered nature of academic media and communication research, the importance of research associations is emphasized. The largest one is the Japan Society for Studies in Journalism and Mass Communication (*Nihon Masukomi Gakkai*) with about 1400 members. There are at least twelve relevant associations in Japan, with various focuses, membership profiles and functions (see Chapter 2.3). Through these associations scholars doing research in the fields of media, communication, information society etc. meet and form various study groups. The journals of the associations are important publishing channels for research in the field.

Research in media and communication outside the academic community is abundant and rich. Most television companies, newspapers and advertising agencies have their own research units or subsidiaries, which most commonly focus on audience and/or marketing research aimed at developing the business of the companies. In addition to these research institutions there are some public and private independent research institutes or think tanks focusing on media, and often on media policy issues or issues concerning technological development.

This chapter first describes the academic research environment, university system and education, then gives a brief outline of the history of media and communication studies in Japan. After that, the chapter introduces the most prominent academic research institutions of the field as well as relevant academic associations. Then independent research organizations are introduced, to be followed by publicly funded research organizations and research institutes, units and companies maintained by



media and telecommunication corporations. The chapter ends with a brief description of research funding.

2.1. The university, media education and research

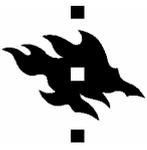
The university system in Japan is undergoing a thorough reorganization. Starting from the academic year 2004² national universities were made into “independent administrative institutions” (*dokuritsu gyosei hojin*, IAI). Previously they had been directly under the control of The Ministry of Education, Culture, Sports, Science and Technology (MEXT). At the same time, universities under local governments were also given the option to make similar changes, while private schooling institutions, including private universities, also began restructuring their organizations.

The university reform of 2004 provided the universities with more independence and the possibility to define allocation of funding themselves. Universities issue 6-year plans to the ministry and are externally evaluated after the six-year period. Future funding is defined based on external evaluation. Although the budget is still executed for one fiscal year, the universities have the option to shift funding to the next year, providing that the project in question continues. Should the universities have surplus funds due to increases in self-revenue or expenditure reductions, under special conditions, it is possible for the universities to allocate the surplus funds to uses stated in advance in the 6-year plan. (MEXT 2003)

As the national university funding system is not tied to the numbers of graduating students (like in Finland), the amount of master’s degree and doctoral students has recently been cut. The amount of faculty positions in the field is not increasing and job prospects for those with doctoral degrees in particular are grim. At e.g. Sophia University, the amount of good applicants has been decreasing, thus leading to diminishing student intake.

Competition over students in the age of smaller age cohorts has led to attempts to create new, attractive media-related education programs in universities. Private universities are dependent on tuition fees and market their programs aggressively. For instance Keio University is starting, from the academic year 2008, a new graduate program in “Media Design”. It is advertised on the website of the university with the following words:

² The academic year and the fiscal year in Japan begins at the beginning of April and ends at the end of March.



Keio University Graduate School of Media Design provides a premier graduate education to prepare students for leadership as "Media Innovators" in the modern creative society. A "Media Innovator" is a leader who understands the core values of creativity and innovation, who can implement and manage creative activities, and who is also capable of converting creative and innovative activities into economic and cultural value for society to the maximum extent. Therefore, the education program produces international professional leaders and scholars who can revolutionize industry and the bureaucracy, create and innovate new generations of digital media, who can produce innovative digital content and experience, and who can create, edit, and distribute "knowledge", which is the most valuable resource in our global society.

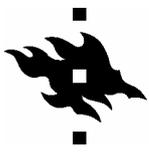
Despite the fact that there are only a few departments in the field of media and communication studies in the universities, there are about 230 universities providing education in the field³. The undergraduate courses provide instruction in different media-related professions, while the quality of education varies greatly, as well as the taught courses. Education in journalism at universities is mostly theoretical, and the industry has called for revamping of the courses.

Among the 53 universities with graduate programs in media and communication, 39 have both master level and doctoral level education. Of these universities, 15 belong to the best Japanese universities, six national and nine private. (Sogo Janarizumu Kenkyujo 2004.) Only a few have high research profiles in media and communication research or actually focus on research. Of the national universities, University of Tokyo has had and still has institutionalized conditions for research of media and communication. Of the private universities, the strongest profiles in this field are at Keio University and Sophia University. Waseda University has undergraduate teaching but has shifted into more technological orientations in the research. Waseda is also known for being the alma mater of many journalists and, because of this, has the image of being a school of journalism. Hokkaido University has a new graduate program at the Research Faculty of Media and Communication.

2.2. Background and current situation of academic media and communication studies in Japan

Zeitungswissenschaft, or "Studies of the Newspaper" was the beginning of media studies in Japan, as it was in Finland. Focusing not only on the newspaper but also on journalism, Professor Hideo Ono established the research field in Japan at the turn of the 1920s and 1930s. At the time studies in social sciences were modeled mostly after influences in Germany in the fields of philosophy, politics, economics and sociology. (Tamura 2004)

³ Altogether there are about 700 universities (4-year education). 70 % of the universities are private. There are about 85 national universities and 75 public universities maintained by local governments.



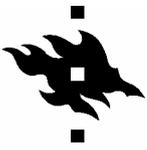
A small research group was established at Tokyo University in 1929 and similar ones at Sophia University and Meiji University in 1932. Professor Ono was instrumental in establishing all three. After the Second World War, journalism education was established at Waseda University, Doshisa University, Nihon University and Tohoku Gakuin University. In these four institutions, the focus has been in the undergraduate programs rather than on research.

The whole education system of Japan was renewed during the US occupation after the Second World War. Education of journalism was no exception. Theoretical approaches, methodology, teaching methods and curriculums were modeled after American empirical science and positivism. In studies of communication, this led to a shift from journalism to mass communication and from studies of the newspaper to studies of mass media. New theories of “the mass”, “public opinion” and “effectiveness function” were introduced to Japan. (Tamura 2004.)

Ishikawa (1998, 60) states that scientific mass communication research in Japan began in 1951 with the establishment of The Japanese Society for the Study of Journalism and Mass Communication. Survey, content analysis methods, as well as effect research were introduced into Japanese mass communication research in 1950s. The Japanese public broadcasting company Nippon Hoso Kyokai established the Broadcasting Culture Research Institute in 1946.

Technological innovations and changes in communication technologies began to bring new challenges for research and education in the 1980s. Transitions in market economy, innovations in the newspaper technologies, development of radio and television and the appearance of telecommunication called for new perspectives and methods. Most of Japanese education and research institutions were thus reorganized and the focus shifted by 1990s from newspapers to the information and communication or to the studies of mass communication.

In many countries, faculties of newspapers studies were reorganized into wider communication orientation by the 1970s. In Japan, reorganization of the curriculum started, however, as late as the 1990s. In terms of research, communication had been studied with a wide spectrum even before the official changes in curriculum or faculty structures. Through the reorganization processes in the 1990s “study of newspapers” as a discipline disappeared from curriculums. It was not abolished, however, but divided into studies of journalism, media, communication and mass communication. (Tamura 2004.)



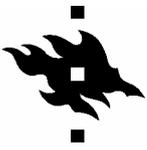
University of Tokyo. Interdisciplinarity is the underlying trend of the whole history of media and communication research at the University of Tokyo. Tokyo Imperial University established a small "research room for newspaper study" (*shimbungaku kenkyushitsu*) in 1929⁴. The research room was located at the Department of Literature and it was an interdisciplinary academic group consisting of three professors, one each from the Departments of Law, Literature and Economics. The group was privately funded by the newspaper industry and financial circles. The initiative for establishing the research field came from the industry. Initially the university was reluctant to establish a research unit in this field, as it was not considered an academic subject. This is the reason why the beginning was with a "research room" or *kenkyushitsu* -structure and not an independent department or institute.

After the Second World War the US occupation General Headquarters (GHQ) suggested, that the University of Tokyo should establish a school of journalism after the example of American universities. However, again the university navigated external influences and instead established in 1949, The Institute of Journalism and Communication Studies. The founding father of the discipline in Japan, Professor Hideo Ono was still working with the university, and tried to maintain some of the *Zeitungswissenschaft* tradition, even with the American influences.

The Institute of Journalism and Communication Studies gradually broadened its focus from newspaper and journalism. In 1957, it was organized internally into five research divisions focusing respectively on "mass-communications theory", "mass-communications history", "communication processes", "mass-communications media", and "public opinion". In the years that followed, divisions of "broadcasting" (1963), "information society" (1974) and "socio-information systems" (1980) were added. The institute established a reputation as a leading center for research on mass-communications and the social aspects of information. It was the only one within Japan's national universities focusing specifically in this field of investigation.

The next big reorganization took place in 1992, when the department was reorganized into three internal divisions: "Information and Media", "Information and Behavior", and "Information and Society". The new institution was called the Institute of Socio-information and Communication Studies, and it studied, among other things, the information society, including a three-year project

⁴ The term *shimbungaku* is a direct translation of the German word *Zeitungswissenschaft*. (*Sanomalehtioppi* in Finnish.)



supported by the Japanese governmental program for "Key Research Areas" entitled "Information Society and Human Beings".

In 2004, the Institute of Socio-Information and Communication Studies merged with the Interfaculty Initiative of Informatics (III) or *Joho Gakkan*, combining the earlier social science and humanistic approaches with natural sciences. The III is a network initiative, where part of the faculty is always visiting from the other departments and institutes of the University of Tokyo on 3 – 7 year terms. Interfaculty Initiative of Informatics maintains the Graduate School of Interdisciplinary Information Studies. The graduate school has three courses: "Cultural and Human Information Studies", "Socio-Information and Communication Studies" and "Interdisciplinary Information Studies". The 50 faculty members are mostly working within these three categories. The graduate school has about 200 master's degree students and 100 students aiming at doctoral degrees. The intake of doctoral students has been on the decrease since academic employment opportunities have declined.

The University of Tokyo has been the most influential research institute in this field. The number of faculty members active in research is also high compared with other universities. The Japan Society for Studies in Journalism and Mass Communication used to have its permanent office at the University of Tokyo. Nowadays, however, the universities rotate turns in maintaining the office. The University of Tokyo has also often been the place where international trends of research have first appeared in Japan. For instance the current dean of III, Professor Shunya Yoshimi has been among the active researchers who have brought cultural studies to Japan in the mid-1990s, despite the fact that he has remained critical towards "the global, fashionable" research tradition (Yoshimi 1998).

With the current structure that combines humanistic and social scientific traditions with natural science, the III aims at maintaining and developing the influential status of the University of Tokyo in this field. The approach is new and bold, and the new generations educated within the new structure can find innovative perspectives for their research. However, there are concerns that digital media, net environment and information society dominate as research subjects and that research on journalism and mass communication are fading away. To avoid this from happening, the following measures are suggested (Yoshimi 2007):

- Re-establishing journalist education in the university as an undergraduate program
- Cooperation of journalism undergraduate course and studies of media contents



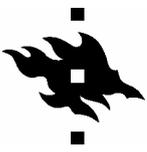
- Cooperation with media educational courses
- Invitations to lecturers from outside the university to give graduate courses
- Collaboration with media companies and reporters
- International cooperation with universities especially in Asia and Australia

Accordingly, the III is very active in the discussions underway about founding an academic School of Journalism. Asahi Shimbun founded its own Institute of Journalism for education of in-house journalists in 2006, because of the theoretical nature of university education. Nevertheless, even it would ultimately like the education to be conducted at universities. There are discussions taking place among some Tokyo area universities and media companies to establish a more practically oriented school of journalism within the university system, III being central in the process.

The III publishes three journals. In *Johogaku kenkyu* faculty papers and refereed papers by graduate students and faculty members are published mostly in Japanese, but sometimes also in English, Chinese or Korean. *Chosa kenkyu kiyō* is a refereed journal. It publishes "research survey reports" based on doctoral dissertations and other research projects. All articles should be based on empirical work. The journal is published in Japanese. *Review of Media, Information and Society* is published in English and includes writings by faculty members or commissioned work by scholars outside of III. It does not publish work by doctoral candidates.

Keio University. The Institute of Media and Communication Research (MediaCom) was established in 1946, under the name of "research room for newspaper study" (*shimbungaku kenkyushitsu*). The current name was taken into use in 1996 to celebrate 50 years of the research institute's existence.

Keio University is one of the most prestigious private universities in Japan. It is famous for independent research institutes rather than undergraduate education, which is the focus of most universities in Japan. Many of the research institutes in different fields of research at Keio are utilized by the ministries and decision makers for expertise and research for policymaking. This is the case also with MediaCom, which not only has governmentally funded projects, but also has active professors who participate with different ministries in policymaking processes and act as consultants for the decision makers. Currently MediaCom is involved in projects that study e.g. journalism and political power, formation of civic participation and "electric networks", information systems and safe society, convergence and digitalization, and change of media environment.



MediaCom takes part in the MEXT-funded Center of Excellence (COE) at Keio University, focusing on media content analysis, forming e.g. the Media Content Analysis Unit at the COE. The Unit focuses on both the print and broadcasting media and studies on how social attitudes are influenced by information from the mass media. (See Chapter 2.7. and Chapter 3.2.)

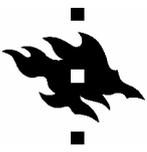
MediaCom is located at the Mita campus of Keio University. It has eight faculty members and 4 – 5 support staff members.

After 2004 when The University of Tokyo merged the Institute of Socio-Information and Communication Studies with the Interfaculty Initiative of Informatics, Keio's MediaCom has been the only research institute focusing solely on humanistic and social scientific research on media and communication. MediaCom focuses purely on research and does not have an undergraduate program, although it gives undergraduate courses to about 150 students studying in other majors at the university. Although MediaCom does not have a graduate program itself, it is closely involved with the Graduate School of Media and Governance located at the Shonan Fujisawa Campus. The graduate program was established in 1994.

MediaCom is one of the most international research units in Japan. It has an active policy of promoting the international exchange of faculty members and students, as well as accepting international visiting scholars and students. There are also several active professors with internationally well-known careers. It has published a journal in English for 25 years. *Keio Communication Review* has been available on the Internet since 1999. MediaCom also publishes an annual journal in Japanese, called *Media Communication*.

Sophia University is one of the oldest private universities in Japan and one of the Catholic universities founded by the Jesuits in 1913. It has one of the oldest Departments of Journalism, founded 1932, as a part of a special section in the university focusing on organizing courses in the evenings. In 1948, the university was reorganized after the American model, and the Department of Journalism was included into the Faculty of Humanities. Graduate programs were established in the 1970's: a Master's program in 1970 and a Ph.D. program in 1974. By 2003, about 200 master level graduates and 11 PhDs had graduated Sophia University's Department of Journalism.

The department has eight faculty members, and the main focus in research is in journalism, while research of media policy, digital media, public service broadcasting and media theory also is



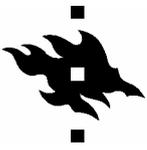
conducted. A considerable amount of the research focus on phenomena outside Japan, mainly in Asia, but often also on the United States and European countries, since many of the doctoral candidates come from abroad.

The Institute for Communications Research within the Department of Journalism at Sophia has published the annual journal *Communications Research* (in Japanese) since 1971. The journal also acts as an annual report, since it contains information of the past year's theses and dissertations, as well as seminar reports and speeches. In 2005 – 2006, articles mostly focus on media structures, especially on broadcasting.

Doshisa University maintains the Doshisa Center for Media and Communication Research with seven faculty members. The center was founded after the Second World War to study newspapers and their role in Japanese militarism. The largest research project of the center is “comparative study of world media laws and ethics and proposal for improving media quality”. Research of media ethics, information democracy and online journalism are included in the scope Doshisa's research. The center publishes the journal *Doshisa Journal of Media & Communication Research*.

Tohoku University is a national university, traditionally and internationally strong in natural sciences. It has also carried out some interesting attempts in multi-disciplinary approaches. The Graduate School of Information Sciences (GSIS) (Daigakuin Johokagaku Kenkyuka) was founded in 1993. The core of the school is in the computer sciences, but it also has laboratories in information mathematics and information physics. There are also studies of intelligent robotics. However, GSIS also focuses on human and social sciences, civil engineering and the biological sciences in order to study the interdependent relationships between “information and information technology” and “human and society”. GSIS, thus, focuses on the meaning of information, recognition of information, reaction to information and social effects of information technology. The ambitious aim of the school is to create “new information science” by encouraging collaboration among the different fields of information sciences.

Media and Information Science is located in the Department of Human-Social Information Sciences, which is one of the four departments at the Graduate School of Information Sciences. It was founded in 2001 and has two small research laboratories: one focusing on Media and Culture and the other focusing on Media Semiotics. The aim of the institution is to promote research activities in both theory and practices. Since 2002, the Media and Culture laboratory has run a



“Media Literacy Project”, which involves local citizens and aims at encouraging “Civic Media” activities. The Media Semiotics laboratory focuses on two research areas: Media and Semiotics and Media and Pop-Culture.

GSIS publishes the journal *Interdisciplinary Information Science*, which mostly focuses on computer sciences and information technology.

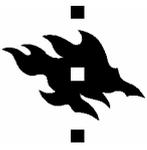
Hokkaido University founded the Research Faculty of Media and Communication (FRMC) and the Graduate School of International Media and Communication in 2000. The university does not have an undergraduate program. The doctoral course started in 2002. The School was reorganized into Graduate School of International Media, Communication and Tourism studies in April 2007.

Hokkaido University appears to be the only national university that has recently established a faculty for research of media and communication. Since 2003, FRMC has published an Internet-journal called *International Media and Communication Journal*, which, because of restructuring of the institute, was unavailable in English during spring 2007, but was available in Japanese. The small unit has still to strengthen its reputation as a research facility.

Waseda University is one of the highest-ranking private universities in Japan. A “research room” for newspaper studies was established at Waseda in 1932 by Professor Ono. Undergraduate courses continue at the School of Culture, Media & Society, founded under this name in April 2007.

However, Waseda does not have any research units particularly focusing on media and communication research, and neither does it have graduate school for the field. As noted, the university is still famous as the alma mater of journalists, who have graduated various programs at Waseda, such as law, economics or international relations. There are also institutes and graduate schools that do research related to media and communication.

For instance at the Information Technology Research Organization (ITRO) there are projects including network society, content applications and digital archives and social aspects of Internet usage. However, the main focus for the ITRO is in technology and natural scientific projects such as communication between people and humanoids, and basic computing technologies. Waseda also has a system of changing project institutes, which also include themes of media and communication.



Global Information and Telecommunication Institute (GITI) promotes interdisciplinary research, and administers joint research projects with academia, enterprises, the government and different research institutions in Japan and overseas. The institute aims at a leading position in information and communication research in Asia. It has wide international cooperation and receives researchers, educators and students from abroad, including Finland.

GITI mostly focuses on technological research of the information and communication system (wireless, satellite communication modes, digital broadcasting, networking architecture, information and communication network and multimedia). However, there is also research on topics of media art, including expression in cyber space, expression of multimedia, image processing and media design.

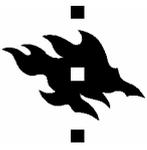
Within GITI functions the Graduate School of Information and Telecommunication Studies (GITS), founded in 2000. GITS focuses on Computer Systems and Network Engineering, Multimedia Science and Arts and Info-Telecom Socio-Economics, Network Business and Policy.

The journal of the institution is *GITI /GITS Research Bulletin*.

2.3. Academic associations

Twelve associations relevant to media and communication research in Japan are introduced in this chapter. In the largest associations, there are more than a thousand members each, in the middle-size ones there are some hundred members. Information on the size of the associations is not available for about half of the associations.

About half of the associations approach media from different angles. Then there are five associations focusing on the relationship of new technology and society. They appear to define their focus in a more or less similar way and also publish in their journals articles on quite similar themes. Three of them aim at establishing a new academic discipline. The existence of these many associations tells about the vastness of the field, but also illustrates the youth and un-defined nature of the research field. Half of the associations are fairly new: they were established in the 1990s or later. In the following, the associations are grouped into two groups: "the old" associations, established before 1990, and "the new" associations founded after 1990.



The associations are briefly described here, and more information on the research published by the associations is described in Chapter 3.

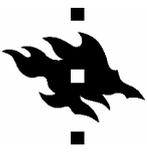
The old associations

Japan Society for Studies in Journalism and Mass Communication (Nihon Masu Komyunikeishon Gakkai) was founded in 1951 as the Nihon Shimbun Gakkai, Association of Newspaper Research. Currently it has about 1400 members. There are about 30 companies supporting the association, which publishes an annual journal *Masu komyunikeishon kenkyu*. The journal publishes theoretically based research on varied subjects written by academic researchers. The association was originally run at the University of Tokyo, but now participating universities take turns in the administration of the association. Currently the office is at the Tokyo Keizai University.

Japan Academy of Advertising (Nihon Kokoku Gakkai) was founded already in 1966. It has currently 622 members and 34 supporting companies. The aim of the association is to do theoretical and empirical research of advertisements and act as a lobbying organization. The supporting organizations include Asahi Shimbun and other newspapers, several advertising agencies and television companies. The association is coordinated at Waseda University, Marketing Department. It publishes the annual journal *Kokoku kagaku* (Journal of Advertising Science).

The Japan Society of Publishing Studies (Nippon Shuppan Gakkai) was founded in 1969. It aims at improving research on publication and has nine departments: history, publishing distribution, publishing law, publishing technology, journal studies, academic publishing, digital publishing and Kansai sectional meeting. The society publishes the journal *Shuppan kenkyu*.

The Communication Association of Japan (Nihon Komyunikeishon Gakkai) is the speech communication association, mostly focusing on international and cultural communication and the education of Japanese and foreign languages. The association was founded in 1971, and has functioned under the current name since 1985. The association publishes newsletter *CAJ News* (*CAJ nyusu*) and two journals, *Human Communication Studies* (*Hyuman komyunikeishon kenkyu*) and *Communication Education* (*Supiichi komyunikeishon kyoiku*). The journals publish articles both in Japanese and in English.



Gendai Fuzoku Kenkyukai does not have an official name in English, but the name can be loosely translated as “Research Association of Contemporary Culture”. The association functions within the framework of sociology and cultural studies and was founded in 1975, inspired by professor emeritus Takeo Kuwabara at Kyoto University. The association focuses on research of contemporary culture, including popular culture, everyday life and media usage and publishes the journal *Gendai Fuzoku*.

The Japan Society of Information and Communication Research/ JSICR (Joho Tsushin Gakkai) is a foundation. It was founded in 1983 to commemorate The UN World Communication Year. Currently JSICR has 937 individual members and 54 organizational members. The association was founded to encourage and do research on telecommunication from humanistic, social, cultural and political viewpoints. Prior to the establishment of the association, telecommunication was mostly considered just from a technological point of view. In the 1980's, when faxes and data communication spread into everyday usage, it became necessary to bring social sciences into the analysis. Currently the society focuses on social, political, cultural and economical problems of the information society and globalization of information flow.

The society has seven thematic study areas with respective study groups:

- legal issues in information and telecommunication
- economic issues in information and telecommunication
- information society
- international information
- information culture
- multimedia
- information behavior

The society also holds internal lecture meetings, symposiums and presentations of individual research projects, but also an “International Communication Forum”, with international guests. The association has an independent office in Toranomon, Tokyo. Currently the president of the association is Professor Youichi Ito from Keio University MediaCom.

In addition to the annual report *Joho tsushin nenpou*, the association publishes an academic journal three times a year. The journal is called *Joho tsushin gakkai shi*.



The new associations

Japan Association of Social Informatics (JASI) (Nihon Shakai Joho Gakkai) was founded in 1991. It aims at a desirable development of society in the age of information technology, wishing to establish a theoretical approach where the social system is perceived from the point of view of information. It focuses on the relationship between the new information and communication system and the social systems. The themes of interest include:

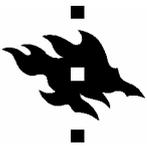
- the basic theory of social information informatics
- information, economics and the city
- information society, law and security
- media and culture
- communication and social relationships
- local citizens, their activities and ICT
- information systems and social applications
- game, simulation and network analysis

The Research Association of Media History (Media-shi Kenkyukai) was founded in 1992 to network researchers working on media and mass communication history. The association publishes a semi-annual journal *Mediashi kenkyu*. It has its office at Tokyo Keizai University Communication Department.

Japan Association for Educational Media Study (Nihon Kyoiku Media Gakkai) was founded in 1993, and currently has about 300 members. The association promotes research to educational media. It is managed at Tokyo Gakugei University, Research unit of education, and publishes a semi-annual journal *Kyoiku media kenkyu*.

Japan Information-Culturology Society (JICS) (Joho Bunka Gakkai) was founded in 1993. It aims at creating a new academic discipline concerned with information culture and at developing the culture of information society. The association publishes the journal *JICD kenkyu*.

The Japan Society for Socio-Information Studies (JSIS) (Nihon Shakai Joho Gakkai) was founded in 1999, and aims at constructing social information studies as an integrated science. It is administered at the Sapporo Gakuin University, Social Information Department. The association assesses the development of information society and its relation to the cultural system, social system, technological system, economic system as well as information media and communication. JSIS publishes the semi-annual journal *Shakai johogaku kenkyu*.



Japanese Society for Information and Media Studies (Joho Media Gakkai) was founded in 2000 and has about 350 members. The association focuses on informatics. It is administered at the Tsukuba University Library Information Media Research Center.

2.4. Independent (private and semi-public) research organizations

RITE, Research Institute of Telecommunication and Economics (Kokusai Keizai Tsushin Kenkyusho) is maintained by the Foundation for Multimedia Communications. Members of the foundation include e.g. the Ministry of Communications (MIC), NHK, all major ICT-companies in Japan and several cities and prefectures.

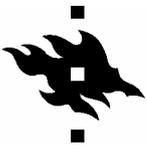
RITE is a semi-public organization and it collects funding from both public and private sources. The research at RITE focuses on e.g. international comparison of telecommunication and broadcasting laws, social structure and communication technology, new business opportunities and technological innovations in ICT and convergence of multimedia, communication and broadcasting.

Media Research Institute (Media Sogo Kenkyujo) was founded in 1994 to work in cooperation with local readers' associations, viewers' associations and groups representing media users. The institute is a non-profit organization and functions on membership fees, donations and public subsidies. The functions of the institute focus on three points: 1) Influence of media in everyday life: Social and cultural meanings and usages of media, as well as suggestions for developing the media. 2) Labor conditions of media industry workers. 3) Bringing together readers/viewers/users of media and makers of media in symposiums, seminars and conferences.

Recent themes of research and activities include 1) the problems of journalism and journalist profession 2) mass media legislation 3) the industrial structure of mass media 4) citizens' rights and access to media. In addition to these current themes, the institute has since 1996 conducted a survey of opinions on television programming for supporting the creation of quality television programs.

The institute publishes the journal *Hoso repoto* (Broadcasting report) six times a year. Members also get an information package on current policy issues on broadcasting and telecommunication twice a year as well as a chance to participate in seminars and lectures free.

Japan Media Literacy Research Institute (FCT Media Literashii Kenkyujo) is maintained by the non-profit organization Forum for Citizen's Television and Media. It organizes discussion forums in



media-related themes. These forums are open to anybody. The institute conducts research on the issues that come up at the forums. It also does commissioned research with mostly public funding. The costs are covered with public commissioned work, private donations and membership fees. The institute was founded in 1977 by Professor Midori Suzuki, whose commemorative fund since 2006 issues funding for research and projects to enhance media literacy. The institute has especially focused on issues of media ethics, children's, young people's, women's and elderly media usage and media literacy, citizen's participation in media, as well as gender and media. The institute publishes books, reports and materials for media education. (See Chapter 3.3.)

2.5. Publicly funded research organizations

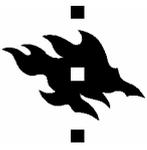
NHK Broadcasting Culture Research Institute (NHK Bunken) (NHK Hoso Bunka Kenkyujo) was founded in 1946 as a comprehensive research establishment of NHK. Bunken conducts research on audiences, research and development for program-making and programming purposes and research on media-related issues in broadcasting and digital media.

Japan's Broadcasting Law stipulates that the public broadcaster must conduct research activities along with broadcasting television programs. NHK researches program contents, investigates both Japanese and foreign broadcasting cultures and makes surveys on audience attitudes. The research acts as background information in basic policy-making of the public broadcaster. Bunken makes most of its research results available for the public and publishes several journals.

Bunken also conducts research that refers to media and media usage only indirectly. Every five years NHK conducts "The Survey on Value Orientations of the Japanese", surveying 5000 people to grasp changes in the people's attitudes and values. The survey has so far been conducted seven times, and the latest issue is from 2004. Bunken also conducts time budget surveys every five years.

One of the large research areas at Bunken is the research of media language. There is virtually no research on this field done outside Bunken, which means that research on language used in commercial broadcaster's programs is virtually nonexistent. (Gatzen 2001.)

Another strong research area at Bunken is media education (see Chapter 3.3). It also focuses on international comparisons of different media phenomena, from contents to industrial issues. Obviously, Bunken also conducts research on the role of public service broadcasting in Japan and in the international setting.



Currently Bunken has about 80 employees, including part-timers. This makes the institute the largest among the traditional mass media company research units and much larger than any university research unit. However, the number of the researchers has been decreasing, as has the number of employees at NHK in general. Most of the employees come to work at Bunken as part of their circulation within NHK, and only a few have academic degrees beyond the usual bachelor level. However, there are also some researchers who have moved to NHK from universities and some have doctoral degrees.

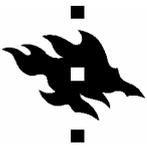
The publication volume of Bunken is vast. Some of the regular publications include the English journal *NHK Broadcasting Studies* (previously *Studies on Broadcasting*), and several journals in Japanese: monthly research report *Hoso Kenkyu to Chosa* (Research and Surveys on Broadcasting), *Hoso Media Kenkyu* (Studies of Broadcasting and Media), which publishes critical essays, and *NHK Detabukku, Sekai no Hoso* (Databook of NHK, Broadcasting in the World).

National Institute of Informatics (NII) (Kokuritsu Johogaku Kenkyujo) focuses on integrated research and development activities in information-related fields, including networking, software, and content. It is an inter-university research institute and gets its funding mostly through MEXT. It was founded in 2000 and is founded on development projects of electronic, academic information systems and computer science research. Since 2004, it has included the Research Organization of Information and Systems.

NII has two major tasks: advancing integrated research and education in the field of informatics and developing and promoting the so-called "Cyber Science Infrastructure", meaning electronic search engines and databases of scientific and academic information in Japan. NII maintains e.g. a database of academic associations in Japan.

Within NII, the Graduate University for Advanced Studies functions with an interdisciplinary doctoral course in informatics.

NII aims at interdisciplinary research of information systems. For this purpose, it established the Research Organization of Information and Systems, the Transdisciplinary Research Integration Center in 2005. NII is active in international collaboration, cooperation with the industry, with universities, non-profit organizations and decision makers.



Current NII projects focus e.g. on media literacy and the Internet, metadata, data mining, Web 2.0 and reliability of information in the age of the information explosion.

Institute of Information and Communication Policy is a research institute directly under Ministry of Internal Affairs and Communications. The work of the institute is aimed to help in policy decision making and to give information for regulative decisions. Currently the institute is researching, for instance, convergence of broadcasting and telecommunication, the impact of telecommunication fees on income distribution and conditions of web-content production. The institute actively cooperates with universities and offers faculty members in universities an opportunity to work for some time at the institute as a visiting researcher.

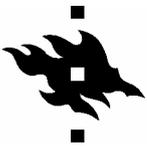
2.6. Research institutions of media and telecom companies

Asahi Institute of Journalism was founded in 2006. It is a department of Japan's second largest newspaper, *Asahi Shimbun*. The institute acts both as a School of Journalism for *Asahi Shimbun* employees and as a research unit, which continues the work of the former *Asahi Shimbun Research Division*.

The Institute of Journalism provides training for the newly employed journalists as well as conducts theme-specific training projects for younger and mid-career reporters. The institute also provides seminars and courses for students and general readers outside the company and organizes various symposiums and forums.

Research at the institute focuses on journalism media. Themes include the role of newspapers in the Internet age and the status of media censorship, as well as new media phenomena, such as Web 2.0 and the trend of young people not reading newspapers. The institute continues publishing the monthly journal *AIR21*, which was formerly the annual report for the *Asahi Shimbun Research Division*. *AIR 21* covers a variety of issues including functions of diversified media, study results from research projects with themes ranging from politics and business to society and results of opinion polls.

Through the Institute of Journalism *Asahi Shimbun* cooperates with 14 universities, providing courses in, for example, "Theory of Media in Practice" and "Journalism Comprehensive Course". Participating universities include The University of Tokyo and Keio University. Members of the institute staff have affiliations and positions with those and other universities, teaching courses and



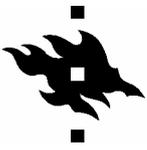
giving visiting lectures. Asahi Institute of Journalism aims at deeper cooperation, hoping that eventually universities will establish a school of journalism within the university that would issue official degrees for journalist accreditation.

The Asahi Institute of Journalism is actively seeking international links and already has established partnership with the Tsinghua University of China. There are also discussions about cooperation with various institutions underway in different parts of the world.

InfoCom Research Inc. (Kabushiki Kaisha Joho Tsushin Sogo Kenkyusho) was founded by NTT in 1985. It currently has about 95 full time employees, of which 75 are researchers. With this size, InfoCom is the largest think tank in the telecom research area. It does commissioned work for NTT and its different subsidiaries, as well as for different governmental organizations. InfoCom conducts research on the global development and situation of information and communication industries and does research and analysis on e-commerce and other ICT related markets. It also takes on commissioned work from e.g. local governments for consulting, proposals and formulation of regional ICT plans and conducts consulting of management strategies and information system development. InfoCom has websites and email newsletters, in Japanese, on ICT sector news for registered subscribers. Most of its commissioned work is naturally confidential, but some reports are published on its website. InfoCom publishes the annual data book *Information and Communication in Japan* in English.

KDDI Research Institute, Inc. is a subsidiary of Japan's second biggest mobile operator KDDI. The institute is a think tank which supports KDDI's business by providing research and study in the international telecom legal framework and services, in marketing analysis, market forecasting and in the framework and structure of future business and lifestyle. The think tank also acts as a lobbying organization in the fields of communication policy and law. They also focus on the international developments of the field.

Currently the unit has about 30 researchers. The number of researchers was cut during the recession years of the 1990s, as in many other think tanks, but the number could be growing again now that the situation has stabilized. In the field of telecommunications, the KDDI Research Institute is the second largest think tank after InfoCom Research Inc.



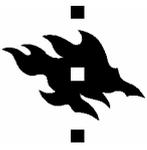
There is strong cooperation between the KDDI Research Institute and universities. The institute either invites academic researchers as research fellows to take part in the institute's research programs, or promotes joint study projects with academic researchers and research organizations. There are also a number of staff members who are graduate students at different universities. KDDI also takes part in projects with universities. For instance, last year, it cooperated with Waseda GITI (See Chapter 2.2) in a project that looked into the economic impact of IT industry in the economic growth of Asian Countries. The project was funded and results published by the International Communication Foundation (See Chapter 2.7).

The institute is currently studying e.g. telecommunication business environment after the convergence of telecommunication and broadcasting services. It also conducts medium and long-range customer user trend surveys in telecommunications.

The research reports are mostly written for internal usage, but some are published on the institute's website.

TBS Media Research Institute (MRI) (TBS Media Sogo Kenkyujo) is a small research institute under the private television broadcaster Tokyo Broadcasting System. MRI has 14 employees and focuses on research of digital broadcasting strategies, digital contents, media development in Asia, radio in the digital age and network society. MRI also acts as a lobbying and liaison organization with the government, NHK and commercial broadcasters. The institute publishes the semi-monthly journal *Shin-chosa janaru*.

Fuji TV statistics department (Fuji Hensei Chosabu) is a tiny department within the largest broadcasting company Fuji Television. The department analyses viewing rating developments and occasionally does its own market research, on such issues as the reasons for why viewership of a particular program suddenly plummets. The department also occasionally commissions research work to research companies. The department only has three permanent employees and two temporary workers. Fuji Television still has a strong research image, as the department is in charge of publishing *Aura*, Fuji television's research report. It publishes articles by media and communication researchers working in different research institutions, mainly in universities, and aims at maintaining dialogue about broadcasting related issues.



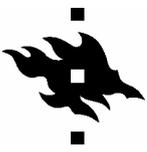
Dentsu Communication Institute Inc. is a subsidiary of the world's biggest advertising agency, Dentsu. The company has its origins in the Dentsu Institute for Human Studies Inc., which existed from 1987 to 1999 as an independent company and focused on "human studies". In 1999, this company was merged into Dentsu Inc., again to be established as an independent company in 2004. The company focuses its research on communication, including industrial, economic, consumer and media trends. The institute publishes various publications, including journal *Communication inquiries* (in Japanese) and annual *Joho media hakusho* (Research for Information and Media) containing statistics of the media industry in Japan. The institute has 24 employees.

Institute of Media Environment is a small think tank within Hakuholdo DY Media Partners, also known internationally as Hakuholdo DY Holdings⁵. The Institute of Media Environment was established in 2004 to examine the effects of digital technology and social change on the media environment. The institute has about 10 – 15 employees including assisting staff. The institute aims at advancing both media and content by exploring future opportunities in the media business and inventing new potentials in media. It focuses on changes in media usage and is especially interested in youth born in 1983 and after. This generation has been named "the audience of the next generation", as they have lived their lives among various digital devices, which had not yet been invented when older generations were born. There are two main projects at the institute in 2007: The Media-Okoshi project aims at digging up (=okoshi) or developing potential advertising media in both the mass media (newspaper, magazines, radio, TV etc.) as well as in the new media in those forms that have not yet been recognized as advertising media. The Content-Okoshi project explores and develops new, potential content that might attract audiences in a new way and would benefit advertising. (Nakamura 2007).

Hakuholdo Institute of Life and Living (HILL) is a think tank under Hakuholdo Inc, the second largest advertising agency in Japan⁶. Hakuholdo Institute of Life and Living was established in 1981. HILL conducts research primarily on the emerging social trends and the lifestyles of people today. It conducts research on the experiences of people apart from their consumption behavior and social orientations. HILL has created the idea of *seikatsu-sha*, meaning people who live their own lives as everyday beings. The concept attempts to encompass not only the economic aspects of life and

⁵ The company was established in 2003 by the management integration of Hakuholdo Inc., Daiko Advertising Inc., and Yomiko Advertising Inc.

⁶ The tenth largest core agency in the world.



people as consumers, but to also consider the socio-psychological and political aspects of the individual.

The institute has around twenty permanent employees with eleven researchers who are part of an impressive network of universities, industry and governmental organizations.

2.7. Competition over research funding

Like the rest of the world, investment in research in Japan is most abundant in the natural sciences. In many fields of the natural sciences' basic research and technology, Japan is the world leader. In the social sciences, research funding is scarcer, and this applies to the research of media and communication. The general principle is that the closer the research approach comes to information communication technology and new media, the easier it is to find funding for a project.

Japanese doctoral students in media and communication studies have a difficult time funding their research. Foundations or funding organizations for independent dissertation work within Japan are practically non-existent. Professors can apply for money for research projects and groups and then assign graduate students to these projects. In stark contrast, funding for graduate studies abroad or for foreign graduate students studying in Japan is abundant. For this reason, a significant proportion of doctoral dissertations finished in Japan are by Asian doctoral candidates and about subjects involving Asian media and societies. In the social sciences and humanistic fields, many Japanese have written their dissertations outside of Japan, mostly in the US.⁷

The funding organizations and foundations described in this chapter are the most important competitive, public and private funding sources for studies of media and communication.

Together with changes in the university system, Japan has increased competitive research funding while decreasing the amount of direct research funds to universities. The main funding organization is *Japan Society for Promotion of Science* (JSPS) (Nihon Gakujutsu Shinkokai), which is an independent administrative institution (IAI), but in practice is placed under MEXT. JSPS administrates the MEXT *Center of Excellence (COE)* program and *Grant-in-Aid for Scientific Research* -program.

⁷ In general, a doctoral degree in humanistic and some social scientific, areas has been rare in Japanese universities until recently. There are still professors who do not have the degree, as it was not required for professorships.



Centers of Excellence focus mainly on the natural sciences. Fields, which come closest to communication, are informatics and information technology. Thus, most COEs doing research in these fields focus on basic natural scientific research or on the development of technologies.

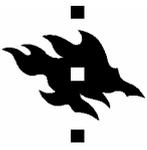
There are no COEs directly focusing on media and communication, but there are some that have included media in the scope of their research areas. For instance, the Ochanomizu University COE Frontiers of Gender Studies has one project area focusing on gender representations in different media. The Keio University COE the Center for Civil Society with Comparative Perspective (COE-CCC), has a Media Content Analysis unit, which has studied, for instance, the contents of new media in relation to public opinion.

Grant-in-Aid for Scientific Research -program has, in recent years, funded several projects in media and communication research and at various universities. The scholarship amounts range from about 4000 Euro to about 20 000 Euro/year, thus limiting the size of the projects. They can last from one to three years. Recently projects have included research on such varied topics as media literacy; public opinion; broadcasting media history; history or television culture; "Internet Newspaper" as an alternative media; and Canadian, Korean, Kurd or Southeast Asian media from different perspectives.

The largest foundations funding media research that are non-governmental are all provided by the industry. Often funded projects must somehow also involve the founding companies or their research units (as described above in the case of a project run by the KDDI Research Institute, see Chapter 2.6.).

International Communication Foundation (Kokusai Komyunikeishon Kikin) was founded in 1988 by KDD, presently KDDI. The present estate of the foundation is about 30 million Euros, and recently it has funded projects e.g. comparing universal service in the Internet age in Europe, USA and Asia, competition policy in the age of Internet and the impact of mobile television in mobile Internet usage.

Hoso Bunka Foundation (Hoso Bunka Zaidan) was founded in 1974 by NHK, which then invested about 76,4 million euros to the foundation. The foundation aims at promoting the cultural and technological development of broadcasting by issuing funding for research in the field and issuing prizes for excellent television programs (the Japan Prize and the ABU Prize). It accepts



proposals for technological development, research, projects and events related to broadcasting and contributes to the advancement of broadcasting and broadcasting culture. The variation in the themes of research is wide: from comparison of language in TV and on the Internet, to the present situation of radio broadcasting in Australia, or from the research of stereotypes of foreigners in TV-shows to the comparative analysis of television news in Japan and the US.

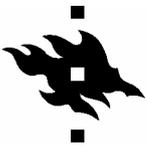
The Telecommunications Advancement Foundation (Denki Tsushin Fukyu Zaidan) was founded in 1982 as a public utility foundation. NTT invests in this foundation, which has a present estate of about 61 million euros. The foundation aims for the development and utilization of telecommunication in all sectors of society, funding projects of both basic ICT technological research and research on the impact of telecommunication. Recently funded projects include research on dependence on the Internet and mobile phone and the influence of the Chinese IT revolution on Chinese economics.

3 Main approaches in media and communication research

There is a large body of Japanese research exploring e.g. media theories, the history of Japanese media, the economic and structural links between different media, and gender and media (Gatzen 2001).

A considerable amount of academic research and doctoral dissertations on media and communication conducted in Japan focus on media and communication-related phenomena outside Japan, in particular in East and South East Asian countries. One explanation is that many doctoral students in Japanese universities come from Asian countries and focus their research on their homelands, but another is that Japanese candidates also quite frequently choose neighboring countries as their topic of research.

In some cases, there are doctoral courses in which the majority of the students come from abroad, especially from Asia. This is because of the funding system (see Chapter 2.7.), in which the funding graduate studies within Japan is very difficult for Japanese students. There is also wide range of research done on media and communication related themes on European countries and on the US in particular. One reason is that understanding the so-called Western, and especially American, media developments have been considered very important in Japan. Another reason is, again,



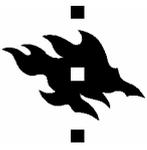
financial: it is easier for Japanese graduate students to find funding to go abroad for study rather than to study in Japan.

Database searches indicate the numbers of books published in different fields. During 2005 – 2006 and 2007 there were, for instance, 334 books on *anime*, 747 about *games* and 385 about *web*, of which 107 handled *Web 2.0*, while there were about 62 books about *journalism* and 73 on *mass media*. There were 335 books handling the *Internet* and around ten about the *newspaper*. All of these are not research publications, but guidebooks or product introduction books and popular or journalistic books. However, the scale difference between different topics is nevertheless instructive of the considered importance of the phenomena in the society.

Like the rest of the world, research on production practices is scarce in Japan, although quite a few guidebook and manual type of books have been published also during the last few years. Recently also issues of media and labor have been focused on in research.

The outline of the following approaches have been defined by going through the article topics of main journals of media and communication research in recent years; keyword searches of books and dissertations in media and communication research published in 2005 – 2007; and information collected from websites of public and private research institutions on their research themes and projects, as well as by using some articles defining the Japanese media research field (e.g. Ishikawa 1995, Yoshimi 1998, Gatzert 2001, Ishita 2002, Muramatsu 2002). When possible, there are references to historical developments of the approach in question. At this point, it is important to note that the definitions may vary by source and that these categorizations are to a certain extent subjective. However, they are based on the aforementioned files, articles and the perceptions of the informants of this research.

Research on speech communication, PR, organizational communication and advertising have been left out of these categories, which is basically the focus of the research of mass communication. The descriptions here mostly handle academic research, but when private or public research institutes are included, it is explicitly pointed out.



3.1. Theoretical and methodological developments

Theoretical and methodological trends for research in Japan have more or less followed international trends. After the Second World War, the trends have mostly come to Japan from the U.S. or through the Anglo-American research traditions of media.

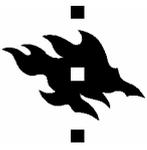
In the 1960s and 1970s a strong Marxist breeze blew through the research field – as it did through sociological research throughout the world. This historical phase still appears in the attitudes of researchers and approaches taken (either pro or contra). The watershed moment occurred when the functions of media itself became the focus of research: either as an industry or as something culturally and socially significant that cannot be reduced to the economic. These perspectives do not necessarily rule each other out, but as it happens, research focusing on the industry from economic point of view usually disregards the other purposes of media altogether. In addition, research focusing on the tasks and cultural/social significance of media often overlooks its nature as an industry.

In the 1960s and 1970s, a considerable amount of research was conducted from the point of view of uses and gratifications studies. In Japan, a common tendency was to overcome the notion of passive audience. (Ishikawa 1998, 62) Later on massive amounts of research has been conducted to test the cognitive (or other) effects of mass communication. An agenda setting function of mass communication has emerged in the focus of research and from an expanded perspective, where social and political effects of mass communication have been studied. In general, Japanese scholars have often applied the effect hypothesis in general political processes. (Ibid.)

The spiral of silence theory, dependency theory, and cultivation theory and knowledge gap hypothesis were frequently appearing approaches in research before the turn of the century. (Ibid.)

Empirical research of media and communication has used predominantly quantitative methods, with survey methods being very popular. (Gatzen 2001.) Recently the qualitative method has gained space, even too much, according to some, at least on the master thesis level.

Currently quite a large proportion of research is theoretical in the sense that they do not have empirical material. In recent years research on e.g. Bertolt Brecht's "radio theory" or on problems of "media-act theory" have been published in the *Masu komyunikeishon kenkyu* (Jul. 2006)



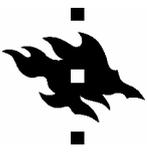
The amount of doctoral dissertations in last two years is not very great. Depending on search methods there are only about 70 – 100 doctoral dissertations of the field which were accepted at different universities in Japan. This is because in humanistic and some social science traditions a doctoral degree has not been necessary even to have an academic career. As described above, media and communication related research is also conducted in abundance within the industry, thus making it possible to create careers within media and communication research without academic degrees. Another reason is the difficulty for finding funding for dissertation work

3.2. Public service, public sphere and research of journalism

Critical studies of mass communication have a fairly strong and long tradition in Japan. The development (and current stage of development) of the public sphere in modern Japan have interested many, and Habermas has been and still is cited frequently. (See e.g. Hayashi 2002, Ishikawa 1998.) Before the breakthrough of the ICT technology and Internet, interest was directed towards the role of journalism and public service in creating the public sphere (Ishikawa *ibid.*). However, recently theoretical and also empirical studies on the possibilities of the internet as a public sphere have increased. Immediate links to issues of media literacy, critical reading abilities, skills of usage and rights to participate come up in this kind of research. (See Chapter 3.3.)

As noted, the history of journalism studies in Japan goes back to the 1920s and to *Zeitungswissenschaft*. Research of journalism since then has mostly followed international trends. Research of journalism has been close to the social and political sciences and to the critical research tradition in earlier years. It is also mostly connected with either newspapers or NHK. Research on the journalism of commercial television appears most abundant when there is a scandal of some sort, which recently have been frequent.

Much of the research on journalism is textual or theoretical. Textual analysis of journalism research has often focused on certain political cases or representational events in journalism. Professional practices or audience responses to journalism have been studied less. Mostly research on the audience of journalism has focused on either in numbers of readers or on the effects of journalism on the audience. Also reasons for (the youth) not reading newspapers have been studied by both industrial and academic researchers.



Among the publishing channels of studies in this area are the journal of the Japan Society for Studies in Journalism and Mass Communication: *Masu komyunikeishon kenkyu* and the journal of Keio University MediaCom, Keio Communication Review (in English).

The theme of war and media has been a popular topic recently in several research projects (e.g. special issue of *Masu komyunikeishon kenkyu* Jan 2005). A new trend is visible in the growing amount of research involving journalism and the new technology. *Masu komyunikeishon kenkyu* published in 2006 (January) a special edition on the adoption and use of information technology in journalism. The issue e.g. included articles on changes in the practices of newspaper journalism caused by the use of information technology, the present status and future trends of public journalism in Japan and an interesting description of new software that analyses sentence and its application on analyzing the editorial content of four major newspapers.

Media historical research has focused among others on the reporters, painters and photographers working with the army during the Second World War (*Mediashi kenkyu* Dec. 2006)

The strongest units for journalism research in universities are the III at Tokyo University, Department of Journalism at Sophia University and MediaCom at Keio University. From the names of academic departments, journalism has all but disappeared. The Sophia University Department of Journalism appears to be alone in retaining its original name. Research of journalism at Sophia is conducted from various points of view, including journalism history and international comparisons of journalism (in Britain, France, Italy, Northern Europe and USA). Three of the nine faculty members have careers as journalists, thus strengthening the focus on journalism.

In recent years, for instance, the Keio University COE the Media Content Analysis Unit of the Center for Civil Society with Comparative Perspective (CCC) has done extensive content analysis on both print and broadcast news media and analyzed their linkages with public opinion.

Research of public service research has been conducted not only by the obvious NHK Bunken, but also by researchers at Sophia University Department of Journalism, University of Tokyo III and Keio MediaCom. This research focuses on definitions of public service and the quality of programming (Ishikawa 1996), etc. An example from the year 2005 is the article on the idea of 'public broadcasting' and independence in the thinking of BBC's John Reith published in *Masu komyunikeishon kenkyu*.



Recently, research on public journalism and 'citizen journalism,' as well as citizen's participation possibilities and the role of journalism in the digital age, has emerged as a topic of research, although in terms of volume the trend is not very wide. (E.g. Ito 2005, *Masu komyunikeishon kenkyu* Jan 2006, *JASI Kaiishi* Sep 2005) Issues of professionalism and journalist work as well as labor conditions are also being studied.

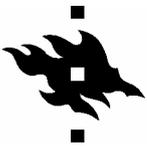
3.3. Educational media, media education and media literacy

The relationship of media and education has from the beginning been two-fold. On the one hand, the focus has been on the usage of media as a tool for education, learning environment or media offering teaching materials for education. On the other hand, the focus has been on the technological abilities to use and cultural abilities to receive and interpret contents of media. The Japan Association of Educational Media (see Chapter 2.3.) publishes in its journal *Kyoiku media kenkyu* articles from both perspectives. For instance in 2006 the journal published articles on Korean cyber university student satisfaction with the virtual learning environment, on Chinese media education, as well as on media literacy as a means of understanding "region".

NHK Bunken has been the leading organization in Japan in the field of studying the media's role in education. Before the Internet, the NHK educational channel was the most important medium providing educational materials through television. NHK Bunken has conducted the School Broadcasting Media Utilization Survey since 1950. As computerization of schools and the spread of the Internet have considerably changed the situation in schools, Bunken has widened the scope of its research and currently includes usage of computers in the report. Bunken also has various projects involving children and media education, including the "Better Programs for Children" project.

NHK has widened its services onto the Internet and currently provide websites connected with its broadcasted educational programs. NHK's main concern is to develop useful and educational materials and to spread information about the material's existence and possible ways of usage. NHK Bunken acts here as the research and development unit and, through publicizing research findings and organizing cooperation with teachers, it spreads information about NHK educational services.

The concept of media literacy arrived from Canada to Japan fairly late, in the beginning of 1990s. The concept was, from early on, connected with citizen's communication rights and abilities for the



critical utilization of media by researchers such as Professors Midori Suzuki and Shin Mizokushi. Professor Suzuki, along with others, established in 1977 the non-profit Forum for Citizen's Television and Media, which later organized its functions into Japan Media Literacy Research Institute (see Chapter 2.4.). The institute is both a research institute and a non-profit organization for citizen's media movements. Projects focus on e.g. children's and youth's media use, gender and media, elderly people and media and media ethics. Researchers work in close cooperation with communities, providing courses for media literacy. The citizen's activities aim at developing communication rights, participating in dialogue with media companies for better program contents, and writing media critiques. The researchers are active participants in the citizen's movement as well. In the media literacy approach, critical use of the media is expected to strengthen the democratic structure in society (Shibata 2002).

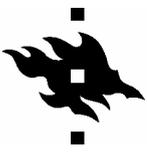
A similar project in smaller scale is underway in Sendai, at Tohoku University (see Chapter 2.2.).

Information education is a concept used by ministries (predecessors of MEXT and MIC) during the 1990s, before the concept of media literacy established itself in Japan. Since the concept of media literacy was first introduced into Japan, the official policy documents of ministries began using the latter term instead. However, the meaning of the terminology is considerably different, and the word "critical" has been excluded from the official documents defining the concept of media literacy. (Shibata 2002, 102; MPT report 2000.)

Since the ICT-boom and the spread of the Internet, attractiveness of media literacy as a research subject has grown rapidly. Policy discussions on the digital divide and the importance of spreading computer skills to all generations has made the field grow. It is one of the areas that can obtain public funding fairly easily, particularly if the projects involve new media. However, the policy makers are more interested in matters of user ability and technical access rather than on critical reading abilities and possibilities for participation. (Shibata 2002.)

3.4. Gender and media

Research of gender and media has mostly focused on women. The theme of women and media can be divided into three areas of research: women in media professions (e.g. Nihon josei... 1994), representations of women in media (e.g. Muramatsu & Gössmann 1998; Muramatsu 2002) and women's magazines from different perspectives (e.g. Morohashi 1998; Sakamoto 1999).



Some research has also focused on family images in films (e.g. Sakamoto 1997). In addition, gender as a perspective on media in Japan has interested researchers abroad (e.g. Skov & Moeran 1995; McLelland 1999; Valaskivi K. 1995, 1999, 2000, 2002, 2004; Darling-Wolf 2004).

According to Muramatsu (2002, 72) feminist studies on media in Japan appeared in the 1970s, when representations of women in television dramas and television news were studied by two different projects. These research projects were repeated in the 1980s and 1990s. Later the setting of the early research was criticized for assuming women's roles as passive receivers of powerful media.

The network of researchers interested in the field make up the backbone of gender and media research. The Gender in Communications Network (GCN) was very active in both research and action programs during the 1990s, but has been less so recently. Currently the network is planning new activities. GCN has focused exclusively on women, and its members are predominantly female.

Recently especially within cultural studies, research of men and masculinities in media has received some attention, but is still mostly a small area of research.

3.5. Research of popular culture has deep roots

Research of popular culture in Japan has its roots in the research of popular entertainment in the 1910s and 1920s. Early research was mostly conducted by sociologists and focused on e.g. popular performances and movie and theatre audiences. The focus of interest was on the relationship between the urban working class and urban entertainment areas. Although the results of the research could have suggested otherwise, early popular culture research defined its findings with the strong Marxist ideology of mass culture, and thus nuances were lost in the process. In the 1930s, focus shifted to radio, where national identity became a central, equally restricting notion. (Yoshimi 1998, 66).

The *Shiso no kagaku* -study group was instrumental to the development of popular culture research from the 1940s to the 1960s. They studied the relationship of popular texts and audience reception of those texts in the everyday life. They studied, for instance, reception and usage of radio, popular novels, magazines and music. Since the beginning of the television era in the 1950s, the group shifted their interest to television texts and reception. Quite differently from the research of the time in the West, the interest of Japanese researchers was in the actual daily practices of "the masses," their use of media for their own purposes, and the meanings they made from the texts. However,



the *Shiso no kagaku* -group still relied on the idea of the mass-consciousness of the groups and failed to see how gender, generation, region or class influenced reception. (Ibid.)

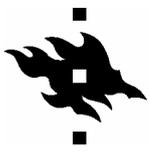
In the 1970s and 1980s, sociological studies focusing on the popular culture were known as “mass culture” or “youth culture” studies. Researchers employed various methods, such as ethnography, counterculture sociology, Marxism, structuralism, consumer culture theory, micro-sociology, the sociology of meaning, communication theory and cultural anthropology. (Ishita 2002, 2.)

According to Yoshimi, semiotics took over as the popular approach in the 1970s and 1980s, causing a major interest in reading both media products and urban spaces as “texts”. Yoshimi criticizes Japanese semiotics for heading into research practices in which contextualization disappeared and the relationship between culture and power also seemed to fade. This is how the semiotic approach, together with postmodernism, was absorbed into commercial discourse. Advertising and commercial articles in magazines utilized the trend, and consumer culture was defined as a “semiotic” society. (1998, 67 – 68.)

The academic research trend internationally known as British cultural studies first arrived in Japan in the late 1980s, but really took off in mid-1990 when a conference hosting Stuart Hall as the plenary speaker was organized in Japan. Originally the group interested in the field was small, and there continues to be heated discussions about the role and potential of cultural studies in the Japanese setting (e.g. Yoshimi 1998, Ishita 2002), but the field has grown quickly and students are very interested in making popular and media culture as their thesis subjects and using an approach that they call cultural studies.

Currently research on Japanese popular culture is conducted in both the universities and private research institutions. Within the strong international tradition of Japanese Studies and Anglo-American anthropology on Japan, one of the focuses has, in recent years, shifted into consideration of Japanese popular culture. In many universities in Japan (e.g. Sophia University or Tohoku University) there are departments of ‘comparative culture’, anthropology and linguistics that employ scholars from the US and Britain and use the cultural studies approach in research.

Since the beginning the boom in mid-1990s of Japanese popular culture in the West the number of published articles and books outside Japan in English, has exploded. There is a growing number of



Japanese researchers taking part in this research field and they publish in international forums in English.

Thus, Japanese research on Japanese popular culture is growing again. Research from the orientation of cultural studies on manga, anime and games is gaining more focus. There have also been some dissertations written on these topics in last two years. Considering the traditional tendency to focus on media with quantitative methods, the change is significant. It is, however, worth noting that the dissertations on manga and anime have not been conducted in III, MediaCom or at the Sophia University Department of Journalism, but at other universities and within the disciplines of literature or sociology. Some studies on game culture have been completed at Keio University, though.

An interesting twist in the research of Japanese popular culture is provided by the Japanese writing on the popularity of Japanese contemporary and popular culture outside of Japan (e.g. Sugiyama 2006, Nakamura & Onochi 2006).

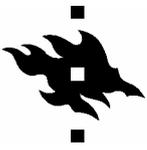
3.6. Audience and reception study approach

Audience research in Japan began already in the 1930s, when NHK started audience surveys to analyze audience interest and response. In the 1940s, NHK took on the diary method in audience research. Nielsen Japan started rating surveys using TV-meters in 1961 and Video Research followed suit in 1962. NHK still has their own measurement systems, NHK reports individual viewer ratings, and the survey companies report household ratings. (Ishikawa 1998, 63.)

Analysis of audience and consumer behavior with various methods has become more and more interesting for marketing and sales purposes. NHK Bunken continues research on viewer ratings and behavior as well as the attitude survey and time budget research (see Chapter 2.5). Analyses on viewing hours, process of channel selection, channel switching, channel repertoire etc. is conducted on a regular basis. (Ishikawa *ibid.*) Private research institutions widen the scope of research into media and consumer behavior and lifestyle choices (see Chapter 2.6.).

Previously mentioned effect research and research on viewer and user behavior are frequently conducted and published in various journals, including the *Masu komyunikeishon kenkyu*.

Research on newspaper audiences is conducted regularly by the Japanese Newspaper Publisher's Association. Also academic research on newspaper and magazine readers is conducted in Japan



(Ishikawa, *ibid.*), although in two last years media related books and dissertations have not focused on audience, but rather on users (of Internet, different Internet contents or mobile communication) or possibilities for citizen participation and participation cases in the information society. These trends are also visible in the articles *Masu komyunikeishon kenkyu* has published 2005 – 2006.

3.7. Media history

The Research Association of Media History (*Mediashi kenkyukai*) was founded in 1992 to network researchers working on media and mass communication history (see Chapter 2.3.). However, research of media history has been abundant already before the association. For instance, *Keio Communication Review* and *NHK Studies on Broadcasting* (later *NHK Broadcasting Studies*) have published a fair amount of media historical research during the years. Earlier historical research has been mostly descriptive.

The association publishes a semi-annual journal *Mediashi kenkyu*, which has in recent years focused on, for instance, in the organizational history of broadcasting and cinema, and in women and media in history focused on from various points of view, including popular culture studies, equality and reader research. The latest issue (Dec. 2006) focused on Japan's role in the Second World War and the influence of media there.

Masu komyunikeishon kenkyu published a special edition on methods of media history in July 2005. Themes included e.g. methodological problems of press history and the role of readers and audiences in media historical studies.

3.8. Media industry, media economy and policy research

A great deal of Japanese research on media focuses on the industry. Historical descriptions of developments of certain sectors or descriptions of cases in industry development, comparison of industry features with corresponding ones abroad, and policy developments have been the focus of research.

Recently, research of the media industry has been strongly moving towards grasping the rapid technological changes and their effects on the nature of mass communication and on the financial survival and development of the industry (see e.g. Sugaya 2005, Minami & Nakata 2007). Some of



the research is made for policy makers with public funding, and some of it is carried out by think tanks within the industry.

Research of convergence, its effects on the content markets, legislation and policy decisions are being conducted at RITE, Keio University MediaCom, MIC's Institute for Information and Communications Policy, as well as at the KDDI Research Institute and at InfoCom Research Inc.

This is the field of research in which the industry and academic researchers work together in a natural way. RITE and JSICR are the necessary networking organizations within the field providing seminars, symposiums, workshops and study groups so that the industry and academia can join forces in research.

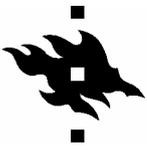
The amount of research of this field is abundant, and the majority articles published in the JSICR journals in the last two years focus on the change of the industry, economy, law or policy in the media or new media related topics.

3.9. Research on natural disasters and communication

Communication, information dissemination, panic and rumor, journalism and the role of media in relation and in times of natural disasters has been and still is studied extensively in Japan because of the obvious reasons of geography and climate. The main research unit focusing on this research area from the perspective of humanities and social sciences is The University of Tokyo III, which continues the research tradition already established previously by the Institute for Journalism and Communication Studies. Numerous surveys on disasters, such as earthquakes, tsunamis, volcanic eruptions, landslides and storms and floods, have been conducted at The University of Tokyo. The focus of research at III is human behavior and organizational responses in times of disaster, and on the collection and transmission of information about disasters. The research has contributed to policy development and reflected current disaster management practices.

3.10. The "socio-information" approach

The term socio-information appears to be indigenously Japanese and seems to have its origins at the University of Tokyo, first as a name of a subject in 1980, and then in the reorganization of media and communications research in 1992. At the time, The Institute of Journalism and Communication Studies was rearranged into three divisions, "Information and Media", "Information and Behavior",



and “Information and Society”, and renamed as the Institute of Socio-information and Communication Studies. The term is a more or less direct translation of the term *shakai joho*, “shakai” meaning the society and “joho” meaning information. The Japan Association of Social Informatics (JASI), founded in 1991, used the same term in Japanese, but decided on a different translation in English. In 1999 yet another *Shakai Joho Gakkai* was established, this time in Sapporo. It calls itself the Japanese Society for Socio-Information Studies (JSIS) in English.

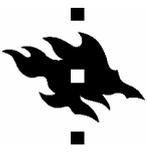
The term *shakai joho* is an attempt at describing the circumstances in which research of information is conducted from humanistic, societal and sociological perspectives. As described above (see Chapter 2.3.) JASI describes its focus areas as the basic theory of social information informatics; information, economics and the city; information society, law and security, media and culture, communication and social relationships; local citizens, their activities and ICT; information systems and social applications; game and simulation and network analysis.

The Japan Society of Information and Communication Association (JSICR) (see Chapter 2.3.) was established by 1983, and was, at the time of its inception, the only association that aimed to combine sociological and humanistic perspectives on a computer science -dominated information research. The definitions of research areas between JASI and JSICR are quite similar, except that JSICR brings onto the table terms like multimedia, information behavior, information culture and international information.

According to JSIS, research of the area focuses on information society and the present situation of cultural system, social system, technological system, economic system and information media, and communication.

From these definitions, we can derive the perception that research of “socio-information” is an attempt to grasp the multiple changes of the current media and communication environment and study them in relation to different fields of research and of society.

The actual research projects under the title of socio-information (and also information-culturology) range from fairly technological ones (“system portfolio for supporting spiritual communication integration of a web community” *JIDC kenkyu* Mar 2005) to more sociological ones (“World Digital City: The mirror that reflects the society” *JASI kaiishi* Aug 2005)



As an economic approach is also included in the socio-informatic approach, a great deal of the research published by the relevant associations covers issues of the new media, convergence and technological development from the point of view of economics. (See Chapter 3.8.)

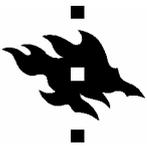
Other new areas of interest include web mining, technological development of tools for identification, and measuring reliability of websites, as well as social network media and Web 2.0.

3.11. Summary: National characteristics in communication and media research

Considering the vastness of the media industry in Japan, the volume and status of academic media and communication research is modest. In the world, Japan is known for its high level of research in the natural sciences and it is also the area in which where Japan has made the most investment. Because of the rapid development of the ICT, telecommunication and new contents, has a more social scientific approach on media become more appealing. Currently topical research areas follow more or less the international example: Internet, social network media, convergence, and media literacy, research of media and popular culture and media history. However, there are also themes where Japan is particularly strong or focused in order to meet its own needs. One such field is that of disaster communication, another is the research on humanoids, human-computer communication and ubiquitous technology.

Japanese media and communication research has its roots in Germany, but since the Second World War, the American and Anglo-American trends have been the strongest. Much of the academic media and communication research in Japan has traditionally been quantitative. Only in the last ten years has more qualitative research appeared, even to a point where some say a more quantitative approach may be needed again.

A typical feature of Japan is that the media industry invests in research and has significant research units often organized as subsidiary companies. Although most of the industry's funding in research goes through research and development and is directed to developing new technologies, there are also institutions of significant size focusing on the social aspects of media, policy issues, consumer markets and the users' viewpoint (e.g. InfoCom Research Inc., KDDI research institute, NHK Bunken and HILL). Because of structural and historical reasons of the university-industry relationship, after the Second World War and until recently research cooperation has been quite rare, but now is taking on quickly.



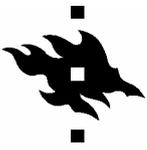
Independent think tanks, which would critically evaluate media and communication policy decisions, are still to be founded in Japan (Ueno 2004), although the independent research institutes focusing on citizens' participation (see Chapter 2.4.) fill some of this role. The research in universities is not consistent or systematic in terms of evaluating policy decisions, although it is conducted frequently.

In the Japanese academic world of media research, the impact of academic associations is strong, although traditionally the connections within departments and universities have been more important than contacts with colleagues in other universities (Cooper-Chen 1997). However, since media and communication research has been and still is dispersed in different universities and into different disciplines, rarely having a department or faculty of its own, the academic associations provide a space of dialogue for the researchers in the field. The associations provide researchers with a means to network and find colleagues with similar subject interests from different organizations, including the industry, especially in the case of associations and researchers in the field of ICT and new media research. Nevertheless, the memberships of associations are quite clearly defined, and interaction between the associations is irregular. Exchange of ideas between the associations is mostly based on active individuals, who are members of several associations. However, the associations as organizations cooperate seldom, if ever.

Japanese research of media and communication has international roots, but it has been fairly domestic. However, in recent years research in the field has internationalized from two directions. Firstly, Japanese researchers have started to publish more in English and for the international audience. Secondly, the Japanese media has become an interesting topic for researchers outside Japan because of the popularity of Japanese contemporary culture, the rapid development of the Japanese mobile sector, and interesting future visions and strategies about the market, technology, products and contents by different Japanese actors related to the media industry.

4 Intertwined future of the industry and media/communication research

The future of media and communication research in Japan – as elsewhere – is intertwined with future aims and strategies, with development of media, technology, new contents, new business models and regulation. These changes and developments are often described by using the term “convergence”.

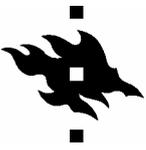


The future media can be seen as being about convergence in many ways. In future research, the following aspects of convergence will be (and already are to some extent) studied:

1. Technological convergence and development up to the level of ubiquitousness. Mobile phone has already converged with camera, walkman and television, and technological differences between broadcasting and telecommunication are disappearing quickly. These developments lead into a need for more research and policy making before all IPR, legal and technological issues have been solved.
2. Economic convergence in the media markets has existed for decades in the form of newspaper and television channel cross-ownership. However, a new trend is seen where Internet companies are buying into television companies, which has been regarded as hostile and worrisome from the point of view of television companies. Research on media markets has increased in recent years, and it is likely to continue growing. However, this field of research has traditionally attracted the attention of only a few academic media scholars, and it will be interesting to see whether the current changes in the markets will make more of them interested in the field.
3. Convergence and changes in contents production and distribution systems have already changed television companies into multi-media content producers. Research on production practices and production organizations will be needed in the future.

There is also the cross-effect of convergence in different areas to be taken into account in business operations and in research. Technological change into digital television and the possibility of watching one's favorite television programs at one's chosen time poses challenges to programming in commercial and public service television companies alike. Another example of technological change influencing contents is the technical possibility of digital television to skip commercials. Not only is this causing advertising agencies to worry, but also inspires new ideas, since the commercial content must be attractive to keep viewers. Short films and dramas based on commercial products have already been developed, as well as dramas with commercials woven into the thread of the drama. In these developments, there are many kinds of possibilities for research and research units of the industry are naturally involved.

U-development brings issues of environmental sustainability and energy (of telecommunication and broadcasting, of mobile phone and other equipment). In 2000 the home appliances, TV and communication devices accounted for 15 percent of the total electric power consumed in Japan. According to some estimations, the increase in the volume of data flow and other developments in the equipments could lead to a situation in which half of the power consumption of Japan would be taken up by communication technology (Sonehara 2007). Thus, research on sustainability of a ubiquitous society will be on the list of crucial research subjects.



Japanese media companies still conduct most of their research and R&D themselves or with their subcontractor companies. However, interest in cooperation is growing, since the university institution has changed and is now actively reaching out, and because the industry also values innovative knowledge that the universities have.

For academic research, the developments offer possibilities, but also a dilemma. On the one hand, research should be up-to-date and aware of the most recent developments for being able to find funding and new commissioned work. Being up-to-date is also to a certain extent important for the relevance of research from the point of view of society and the industry.

However, at the same time research should be able to take a steadier pace, so that careful thought and theoretical grounding of findings becomes possible. The ability of research to create new innovations and ideas for society depends on the possibility to step back and take a wider perspective. If funding becomes too short-tempered and riskless, new directions become hard to find, and the industry and bureaucracy end up trying to catch their own tail.

One of the interviewed professors said:

"It is very hard to say what field of research will become popular in the future. I don't want to predict that, since predicting is a very ideological act. I think researchers should be free from predictions. If you predict, it often means that you predict something for the industry and move along with the industry."

"We need to be independent from industrial trends, and regardless of what happens with the industry, we have to pursue our research interests first, and think of what is important for our academic research and for the society, not what is initiated by industrial interests. In this research field, it is very easy to be dependent on industry predictions."

"There are important research areas, which I don't think will become big. Say, for instance gender. I think it is a very important field in media, journalism and communication studies, but I am sure, it will not get very big. Likewise, if I say, that I think research on the Internet is going to grow tremendously in the communication studies, it is also a very ideological thing to say and I don't want to say that."

This interviewee puts in a nutshell how the role of research can be defined differently from different perspectives. It is also important to remember the different roles and the nature of research fields, despite the importance of multi- and transdisciplinary research.



4.1. Crossing boundaries

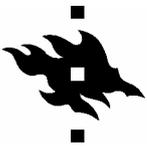
Research of media and communication has different roles and there are also different organizational arrangements to fulfill these roles. Research units and research subsidiaries of media companies in Japan usually look at research work from different perspective than academic researchers. In a commercial research company, it is clear that the aim of research results is, ultimately, to bring revenue for the company.

What can be seen happening in Japan is that these worlds are becoming, if not blurred, then at least meeting and encountering each other. Until 1999, there was a law against university professors working in private enterprises while still working at a university. Since the law was changed, development has been fast and also encouraged by the government. The fact that universities have to compete for public research funding and to find external sources for funding research has forced researchers to formulate their thinking into understandable and sellable projects.

In the future competition over research funding continues and the need to find cooperation and commissioned work from the industry will grow. Japan has obviously outgrown the grim years of the economic recession and is able to look to the future again. This has brought a new sense of enthusiasm, which appears in a willingness and new ability to invest in promising mid-career researchers instead of following the traditional way of focusing on full professors and seasoned members of the disciplines.

As a testing ground for industry-academia research and as an example of involving the associate professor level in research work, there is a three-year program where The University of Tokyo III and Dentsu form a collaborative research team. The name of the project is "Comprehensive research on the effects of rapid structural changes in the media and communications ecosystem" and is funded by Dentsu. The aim is to find a new transdisciplinary way of interpreting the industrial and social structures in the media and communications-related fields. If a new perspective is found, the hope is that there will be a network of research centers supporting a new kind of research in this field. (Dentsu 2007)

This kind of new transdisciplinary projects are welcome, not only as examples of fruitful industry-academia cooperation, but also because despite attempts made in Japan in different universities, the match between natural sciences and social sciences in the area of media and communication



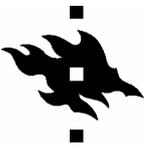
research has still not been very fruitful. Especially social scientific or humanistic research focusing on contents and usage or production processes etc. often appears to find it difficult to match research questions with issues of developing computer programs or human-computer interfaces. However important it may be for social scientific and humanistic views to be present in the basic natural scientific or technological projects, it often happens that what first is developed by engineers is then researched by social scientists and humanists. In an ideal case, the involvement of the industry might act as a catalyst to overcome the boundary between the natural and social sciences.

As noted, however, in Japan serious attempts have been made within the university to carry out this collaboration. There is a risk is that the special nature, visibility, and “brand” of media research and (as in the case of III) journalism is lost within the larger entity of “communication” or “information”, which currently appears to imply new media, Internet and mobile communication. The special role of mass communication, journalism and contents may also be lost in this process. Nevertheless, taking into account the vastness of the current and future changes in the media environment, inter- and transdisciplinary tools are required. It is likely that other universities need to take into account the structural adjustments that Tokyo University has carried out with their Interfaculty Initiative of Informatics. In the future, we will see yet more mergers and fusions of new interdisciplinary communication research institutions. In addition, networking between organizations and researchers will increase.

4.2. Towards stronger professionalism: School of Journalism at the university

The particular role of journalism with media and in the society has recently called for new kinds of measures. Journalism has been in a crisis for several years in Japan. This has appeared in a series of scandals involving fabricated reports in both television and newspapers. NHK has experienced scandals for allowing politicians to influence reporting. The scandals are still continuing and new ones involving newspapers, NHK and/or commercial broadcasters appear regularly.

To develop journalist ethics and professionalism, different media companies have taken different measures. Already by the mid-1990s when a scandal involving the Aum Shinrikyo terrorist group was revealed at TBS, the television company organized a series of seminars and events to discuss journalistic ethics. Also new guidelines for reporting were set. Asahi Shimbun has taken even more serious measures by founding its own Institute of Journalism (see Chapter 2.2. and 4.2.)



Recently newspapers, including Asahi Shimbun, have been active in contacting universities and starting negotiations about establishing a School of Journalism within the university system. The profession of the journalist in Japan is a free profession (like in Finland) and does not require a particular education to be accessed. Because of the recent difficulties and the tightening competition among different media, a need to develop a more consistent body of skills to journalists has become important for editorial offices. Traditionally, newspapers and broadcasters have trained their own employees, but now they would like to have university graduates more knowledgeable about the actual profession before they enter the company. There are also economical reasons for this: training costs money, and media companies wish to downsize their education costs.

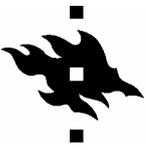
Although journalism has been taught at the universities since the 1920s, courses are currently more or less theoretical. They consist of e.g. legal matters, the history of journalism and media organizations and analysis of journalism. Now the industry would like to see an undergraduate School of Journalism, which would provide professional skills to the students. Universities have taken up the challenge and negotiations are underway. (See Chapters 2.2. and 2.6.)

4.3. U-Japan: potential and empty air

The u-Japan strategy can be considered both a bold reach for the future and a well-orchestrated image campaign. On the one hand, it has brought about enthusiasm and new ideas with which to perceive the development into different areas of society. For instance an international conference organized at The University of Tokyo, III in July 2007 entitled "Ubiquitous media: Asian transformations" describes some of its themes in the following way:

Today media are increasingly ubiquitous: more and more people live in a world of Internet pop-ups and streaming television, mobile phone texting and video clips, MP3 players and pod-casting. The media mobility means greater connectivity via smart wireless environments in the office, the car and airport. It also offers greater possibilities for recording, storage and archiving of media content. This provides not just the potential for greater choice and flexibility in re-working content (TV programmes, movies, music, images, textual data), but also great surveillance (CCTV cameras, computer spy ware, credit data checking and biometrics). The media, then, can no longer be considered to be a monolithic structure producing uniform media effects. Terminology such as 'multi-media,' and 'new media,' fail to adequately capture the proliferation of media forms. Indeed, as media become ubiquitous they become increasingly embedded in material objects and environments, bodies and clothing, zones of transmission and reception. Media pervade out bodies, cultures and societies.

On the other hand, many of those interviewed noted that the concept of ubiquitous is not used as frequently as it used to two years ago. They also note that primarily it is a term that has to be written

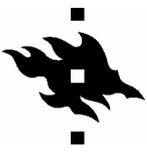


into certain funding applications or for other purposes in order to attract attention. Some note that in terms of technological development, the strategy was too early, since the technology is not here yet. One interviewee said:

Things that could be done, have been done, and now we are looking for the next step. What do the users want next? What kind of new equipment? How do we find new business models?

No matter what the next steps of development are called, it is clear that cooperation between academic research and industry will also continue and deepen in Japan. This is a risk to those research fields that do not necessarily attract commissioned research, such as the aforementioned critical research, or specific approaches, such as those dealing with gender. They might, however, begin to gain unexpected interest through the emphasis on media literacy.

The futuristic aspects of the u-Japan strategy also involve visions of sensors, humanoids and human-computer communication. Development of humanoids and robots is fast, enthusiastic and on a high level in Japan. In addition, the technological development of the ubiquitous environments continues with considerable investments in different universities (e.g. Waseda University Center of Excellence in ubiquitous computing) and research institutions in Japan (RIKEN). Corporations in the ICT technology business have their own vast R&D programs in the ubiquitous technology (e.g. NTT). It is on this practical level that the u-Japan strategy is being executed. The funding it provides, together with the industry investments in research and development, create new technologies, some of which will eventually become part of everyday life in Japan, and most likely in many other parts of the world as well.



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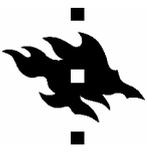
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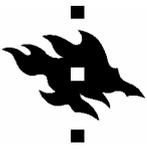
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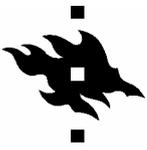
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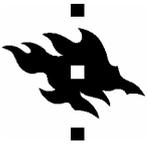
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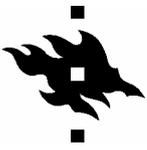
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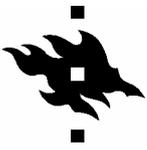
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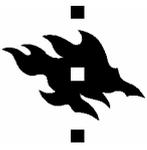
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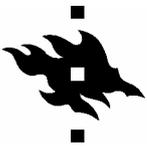
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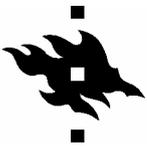
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Masu Komyunikeishon Kenkyu (Journal of Mass Communication Research) Information (in Japanese) available at http://wwwsoc.nii.ac.jp/mscom/journal/paper_contents.html (Accessed May 7, 2007)

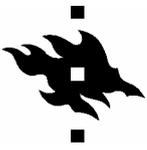
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Mediashi Kenkyu (Research of Media History) Information available (in Japanese) at
http://www.geocities.jp/media_shi/kikanshi.html (Accessed May 7, 2007)

NHK Broadcasting Studies (previously *Studies on Broadcasting*) Information available (in Japanese and in English) at www.nhk.or.jp/bunken (Accessed May 17, 2007)

Shakai Johogaku Kenkyu (Journal of Socio-Information Studies) Information available (in Japanese) at
<http://wwwsoc.nii.ac.jp/jsis/> (Accessed May 17, 2007)

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<http://www.shuppan.jp/kenkyu/kenkyu.html> (Accessed April 27, 2007)



Appendices

Appendix 1: List of illustrations

Pictures

Picture 1.1. Map of Japan

Picture 1.2. Penetration rate of the Internet

Tables

Table 1.1. Information on Japan

Table 1.2. Largest newspaper companies by turnover

Table 1.3. Largest advertising agencies by turnover

Table 1.4. Segments of journals for women (1970s - 2000s)

Table 1.5. Largest television companies by turnover

Table 1.6. Largest Internet companies by turnover

Table 1.7. Average daily contact rate per media

Table 1.8. Time spent with mass media

Table 1.9. Top ten programs by channel

Charts

Chart 1.1. Largest Daily Newspapers by Circulation

Chart 1.2. Daily Contact Rate of Radio: NHK vs. Private

Chart 1.3. Print Sales

Chart 1.4. Daily Contact Rate of Television: NHK vs. Commercial Channels

Chart 1.5. Market Volume of Satellite Broadcasting (BS/CS)

Chart 1.6. Income of Cable Television

Chart 1.7. Shares of Mass Media Market by Sector (2005)

Chart 1.8. Advertising Expenditure in Japan

Chart 1.9. Circulation of Dailies

Chart 1.10. Number of Newspapers and Magazines on the Internet (by type)

Chart 1.11. Advertising Revenue by Media

Chart 1.12. Number of Broadband Subscribers

Chart 1.13. Number of Subscribers: Fixed Communication and Mobile Communication

Chart 1.14. Newspaper Readership in 10 Highest Ranking Countries

Chart 1.15. Types of NHK Programs (per day)

Chart 1.16. Types of Television Programs on Commercial Channels (per day)

Chart 1.17. Breakdown of Total Viewing Time by Type of Program on an Average day

Chart 1.18. Market Volume of Mobile Contents

Chart 1.19. Household Consumption Expenditure in Mass Media and Share of Total Consumption Expenditure

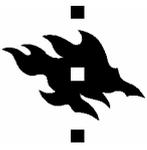


Appendix 2: List of informants' organizations

(number of informants in the organization⁸)

Asahi Journalist School (3)
BS-i (1)
Bunri University of Hospitality, Faculty of Service Management (1)
Dentsu, Media and Content Business Headquarters (1)
Dentsu, Interactive Media Office (2)
Fuji Television, Corporate Strategy Planning (4)
Gender in Media Network (1)
Hakuhodo DY Media Partners (2)
Institute of Media Environment (2)
Japan National Press Club (1)
Japan Newspaper Publishers and Editor's Association (3)
The Japan Society of Information and Communication Research (1)
KDDI, Global Business (1)
KDDI Research Institute Inc. (2)
Keio University, MediaCom (1)
MIC Institute of Information and Communication Policy (1)
Musashi University (1)
National Association of Commercial Broadcasters (1)
National Institute of Informatics (1)
National Institute of Information and Communications Technology (1)
NHK Broadcasting Culture Research Institute (1)
NTT DoCoMo (1)
Sophia University, Department of Journalism (1)
Tokyo Broadcasting System (1)
Tokyo International University, Media Studies (1)
Tsukuba University (1)
University of Tokyo, Graduate School of Arts and Sciences (1)
University of Tokyo, Graduate School of Law and Politics (1)
University of Tokyo, III (3)

⁸ Five of the informants belong to two organizations



Appendix 3: Databases used

GeNII: National Institute of Informatics, Academic Contents Portal:

<http://ge.nii.ac.jp/genii/jsp/index.jsp>

Four sections of GeNII:

- CiNii: NII Scholarly and Academic Information Navigator <http://ci.nii.ac.jp/>
- Webcat Plus: Database of Books <http://webcatplus.nii.ac.jp/>
- KAKEN: Research Themes and Deliverables; Database of Grants-in-Aid for Scientific Research <http://seika.nii.ac.jp/>
- NII DBR: Academic Research Database Repository <http://dbr.nii.ac.jp/>> DBR

National Institute of Informatics Database of Academic Associations:

<http://wwwsoc.nii.ac.jp/index.html>

Kikuzo: Asahi Shimbun Database; Digital News Archives For Libraries

<http://database.asahi.com/library/>