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Marketing food in Japan:

A case study of KitKat's success in Japan through glocalization

Supervisor

Ch. Prof. Hirofumi UTSUMI

Assistant supervisor

Ch. Prof. Marco ZAPPA

Graduand

Irene PUGLISI

Matriculation Number 868943

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Abstract

This thesis is about the strategy of glocalization as a key to success, specifically in the food and confectionery market in Japan. As an example, I will be using Nestlé's KitKat because Japanese KitKats and their flavor varieties are famous all over the world: articles, blogs, videos about this product from Japan are all over the internet. Since KitKats are produced by Nestlé, which is a Swiss company, I asked myself: what kind of strategy did KitKat use in Japan to gain such success? By analyzing KitKat's example I'd like to confirm that glocalization is a way to gain success in the food industry in Japan and to see the main points a foreign firm entering the Japanese market should pay attention to when preparing their marketing strategy.

This study is divided into three parts. The first part is focused on glocalization. First, mostly through the information from "International Business" by Collinson, Narula and Rugman, I will see the effects of globalization and the trend of the internationalization of MNEs, which leads to both an always more standardized global market, where the needs and desires of the consumers begin to be united, and at the same time still the need for flexible products to adapt to the local market and customers. We will see the role of culture and the need to adapt to it when entering a new market and we'll see what glocalization is.

Then, I will consider Nestlé and KitKat. I will first make some general observations on the firm and the product, considering the organization and management style of Nestlé, its mission, values, and projects to bring their vision to life, and then seeing KitKat's original flavor and shape, its variants and how they are being sold around the world. Then, I will specifically consider KitKat Japan's marketing mix as an example of a glocalized strategy, with a special interest in the product variety, its packaging, and how it's advertised through commercials and social media.

The third part will be focused on Japan and its characteristics: on the basis of KitKat's strategy, we'll see Japan's cultural elements that influence the way that businesses operate, such as the Cool Japan phenomenon, the gift-giving tradition and the demographic trends that give a glimpse of the future of Japan's market.

Finally, I will try to draw conclusions on how glocalization, so the adaptation to the local culture, will help reach success, pointing out the elements of Japanese culture of which a foreign business trying to enter the Japanese food and confectionery market should be aware.

要旨

日本のキットカットは味や限定エディションが多く、日本のキットカットを試す日本人や外国人のビデオ、日本のキットカットの味についての記事などが数多くあり、世界中で話題になっている。しかし、キットカットは日本の商品ではなくスイスのネスレの物であり、どうして海外の企業の商品が特に日本で成功したのかという疑問を持った。この疑問に答えるため、本研究は三つの章に分けられ、ネスレのキットカットの日本での成功を事例にして、日本の市場に入ろうとする企業がどういう戦略を利用して日本で成功できるかという課題について調べる研究である。

グローバルゼーションのおかげで企業が対応する市場が拡大し、相手となる消費者も多くなった。グローバルゼーションで大勢の消費者の好みが似てきて、求めていることが近づいてきたことは確かだが、それぞれの国の文化の影響はまだ強く、それによる違いを無視する戦略は効果を出さない可能性はまだ非常に高い。こういう背景を元に、世界中で同じ商品を買っても、国の文化、歴史、消費者の好みによる違いを見極め、また、コミュニケーション方法を変えるグローカリゼーションという戦略が生まれ、第一章は、グローカリゼーションというマーケティングの戦略について調べる。「インターナショナルビジネス」というコッリンソン、ナルラ、ラグマンによって書かれたテキストを基にして、グローバルゼーションによる市場の変化、また、国際的に活躍しようとする企業の知らない市場への入り方、様々な可能な経営構造、そして、入る国の文化を知ることの大切さについても取り組む。

第二章ではネスレの歴史と経営構造をネスレのサイトに掲載されている情報やレポートを通して探る。そして、キットカットの歴史、本来の味と形、そして種類の変化を調べ、現在、世界中で販売されているキットカットの種類をネスレ、またはキットカットの公式ウェブサイトを通して確認し、比較する。その後、特に日本で売られているキットカ

ットの種類とマーケティングミックスを見る。マーケティングミックスは商品を守るための行動の企画であり、「四つの P」と呼ばれる 4つの部分に分かれている：一つ目の Pは商品自体の特徴（Product）であり、コマーシャルや SNS を通してのコミュニケーションのし方が二つ目の P（Promotion）で、三つ目はどこで売るかという点（Placement）、四つ目の Pは値段（Price）である。この四つの点を通してマーケティング戦略が作られるので、ネスレがどういう風に日本の文化に合わせたかということを見たいと思う。

第三章は日本と日本の市場を中心にし、キットカットの戦略を基にして、マーケティング戦略やコミュニケーション方法に影響を与える日本の文化について調べたいと思う。クールジャパンという現象、また、ご当地商品、お土産の文化、限定エディションの大切さ、そして人口の背景、少子高齢化の問題がどう影響を与えるかという様々な点に触れたいと思う。

以上の点を全て分析した上で、海外の企業が日本の市場に入ろうとする際に効果のある戦略の重要なところを考えることを目指している。

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Introduction

Globalization plays a very important role in today's business, but it has also created a very complicated situation with many actors and countries at play. With more and more enterprises that decide to internationalize, they all will face the dilemma of how to be successful in a market they don't know. This study is aimed at confirming that glocalization is a way to gain success in the food industry in Japan and at seeing the main points a foreign firm entering the Japanese market should pay attention to when preparing their marketing strategy.

In Part I, we will first see the phenomenon of globalization, the motivations that bring firms to the decision of internationalizing and the different ways they can enter a market. I will study globalization's influence on the way that enterprises operate and on the consumers themselves, making their tastes become more uniformed and creating the possibility of selling the same product to very different countries. At the same time, however, cultural differences are still very important so I will also touch the subject of the importance of culture in international business and of glocalization, which is the strategy of selling products worldwide but still adapting to the local market, culture, and consumers' taste.

As an example of a company that used glocalization as their strategy I'd like to analyze the marketing strategy Nestlé used to sell their KitKats in Japan, which I will do in Part II. Japanese KitKats are a big hit in Japan, so much so that they are known in the rest of the world as well. The number of different flavors is unseen in other countries, with special limited editions being produced every year, keeping consumers on their toes. Limited editions, flavors specifically connected to typical products of each Japanese prefecture, flavors that have to do with specific times of the year and cultural events are available. With KitKat being a chocolate bar born in UK's Rowntree Mackintosh's factory, which was then bought by a Swiss company, Nestlé, I wanted to know more about how they gained such success in Japan.

So, in Part II, I will analyze Nestlé as a company: its history, strategy, organizational structure and management throughout the world, the company's mission, and key values. We will see that Nestlé goes by the philosophy of "think global, act local", and we will also see how it internationalized, I will introduce KitKat and the various forms it takes, starting from the product's history from its origin at Rowntree Mackintosh in England to its acquisition by Nestlé, then I will visit the KitKat websites of the countries in which it's available to make comparisons between other nations' KitKat flavors, shapes, types and communication style, and see the different ranges of products that are sold in the world. I will then concentrate on the marketing mix used in Japan for KitKat, which consists of the description of the product itself, its promotion, placement in the market,

and the price it's sold at, focusing on the modifications to the product, its flavors, and shapes, how it is advertised on social media and the evolution of the commercials that have been used to advertise the product, starting from the beginning in the 1970s going until today.

Part III will be specifically dedicated to Japan, its culture, and consumers: on the basis of how KitKat adapted to Japan, I will study the Japanese consumers behavior, their preferences and cultural background to see how traditions such as gift-giving and special Japanese events influence the way that products are thought, made, packaged and advertised.

All of this will be done to understand how glocalization can help reach success and to produce some guidelines for food businesses that wish to enter and understand the Japanese market and consumers better, with the main points to pay attention to.

Part I: The strategy of Glocalization

1. Globalization

Globalization is a process that has brought new frontiers in the world of economy, connecting most countries in the world, and making it possible for firms to sell their products anywhere they want and for consumers to obtain almost anything they want from any part of the world.

Narula (2014), in “Globalization and technology: Interdependence, innovation systems and industrial policy”, defines globalization as “the growing interdependence of locations and economic actors across countries and regions”.

More specifically, as explained in Figure 1, taken from the first chapter of “International Business” by Collinson, Narula and Rugman, “interdependence of locations” refers to the fact that, even though firms might be operating in one specific location,

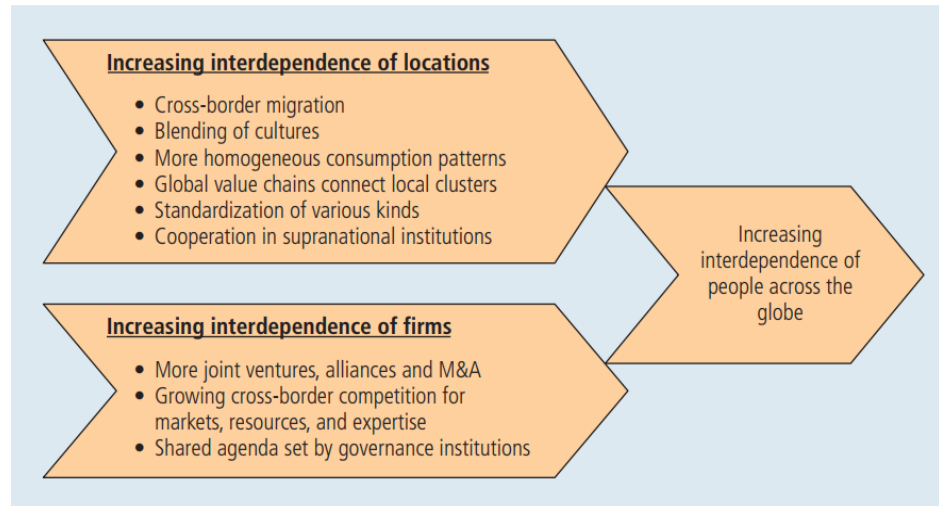


Figure 1 – Interdependence, a consequence of globalization, from “International Business”

they also work in multiple other countries, so the borders between countries seem more blurred. “On the one hand, countries remain sovereign and independent, while on the other hand, they are increasingly swayed by developments outside their borders” (Collinson, Narula and Rugman, 2017), for example fluctuating currencies also depend on the political and economic situation of different countries, so governments must respond to their domestic needs, while at the same time keeping track of international developments. This has also brought to cultures starting to blend, sometimes resulting in similar consumption patterns.

“Interdependence of economic actors” refers to the fact that more and more firms form alliances and joint ventures and practice out-sourcing activities for strategic purposes. For example, the rapid Japanese industrial growth in the Twentieth century has been partly attributed to the *keiretsu* system, formed after World War II, which signed the end of the *zaibatsu* monopolies that used to dominate the Japanese economic scene. In the *keiretsu* system business groups cooperate “to ensure the mutual

success of each company”¹ while also relying on partnerships with the government, banks and suppliers and distributors.

Globalization has made it possible for firms to offer the same products to a much wider audience, which has contributed to a “convergence of consumption patterns” (Collinson et al, 2017), but still a firm shouldn’t forget that markets are local and global at the same time. Companies like Nestlé, in fact, “have carefully plotted a course that allows them to differentiate between those product lines that can be marketed and produced regionally, locally, or globally” (Collinson et al, 2017).

The main elements that influence globalization are associated with socio-political developments and with technology and innovation. In fact, the industrial revolutions were the fuel to this process. New technologies, for example, made transportations and communication much easier, as well as enabling mass production and marketing. Now, international firms tend to locate the different steps of the production process in different countries, in so called global production networks, because it might be more beneficial to them.

Globalization has also made it necessary to create supranational agreements and institutions, to regulate operations of and between international firms. In 1947 the GATT, General Agreement on Tariffs and Trade, was established to “liberalize trade and negotiate trade concessions among member countries” (Collinson et al, 2017). It has been followed by the World Trade Organization, WTO in short, established in 1995, whose goal is to enforce all the agreements that have been made in these regards, which include ones made to protect intellectual property, or to reduce agricultural subsidies for example. The WTO also serves as an international judge in case disputes emerge between its members.

All in all, every coin has two sides, and while globalization surely has opened an infinite number of new doors and, thus, markets to explore, it has also made activities much more complex and difficult to manage. Through globalization, countries and firms have become more interdependent, which also means on one hand that firms can grow their trades and sales internationally, on the other that if there’s a problem in a certain country, this will inevitably influence the rest as well. There are international rules that different countries must follow, and importation rules and taxes of which a firm must be aware and depending on which a company might decide their course of action (for example, relocating if the importation taxes are too high).

¹ TechFaq. “What is Keiretsu?”. <https://www.tech-faq.com/keiretsu.html>.

1.1 The internationalization of MNEs

1.1.1 Motives

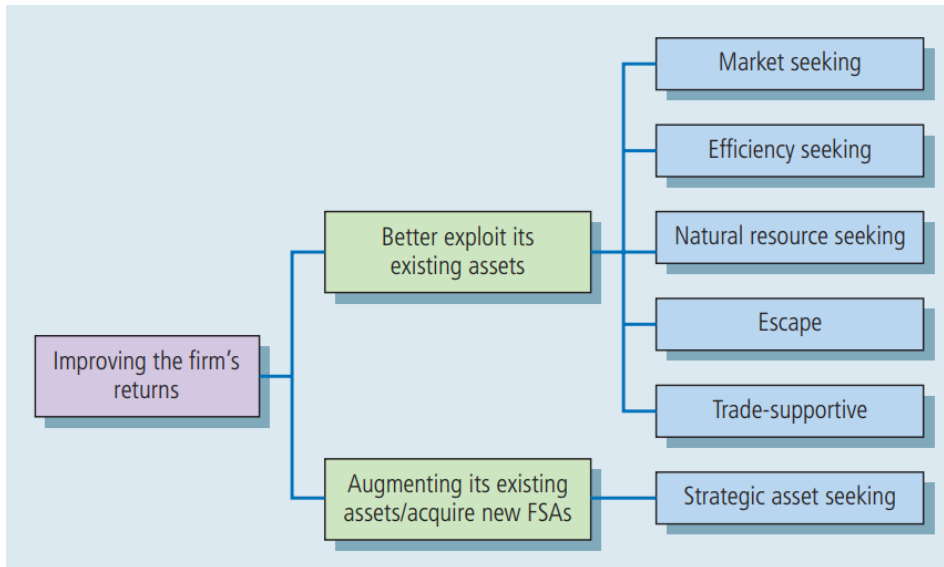


Figure 2 - The motives of internationalization, from page 58 of “International Business”

(Collinson et al, 2017), which is the fuel to its maintenance and growth. So, a firm is always trying to improve their returns and might find that internationalizing business might be the means to do it. Also, they might be trying to make themselves able to respond to an increased competition.

A firm has a set of assets that give it advantage in the market, which are called “firm specific assets”, FSAs. On the other hand, any location and its market have some advantages to offer, called “country specific assets”, CSAs. Through internationalization, a firm might be trying to exploit their existing assets better or to enrich them or gain new ones. FSAs are in fact said to be temporary, since markets are always evolving, making FSAs less valuable over time. In order to sell more and exploit those FSAs, a firm might decide to internationalize, which also helps soften the effects of possible economic swings of the home country.

A firm might also be looking for efficiency: internationalization helps diminish transportation expenses, respond more quickly to the needs of customers, and take advantage of CSAs, which can all help reduce costs. Resource-seeking investments happen when a firm internationalizes to access important resources, such as “land, extractive mining assets, unskilled (or semi-skilled) labor, technological/managerial expertise, etc.” (Collinson et al, 2017), which can prevent opportunistic behaviors from suppliers.

Figure 2 goes on to list “escape” and “trade supportive” as other motives of internationalization. Escape investments are made when the home market is perceived as unstable and thus risky because of its political, social, or economic situation. Trade-supportive internationalization happens when

Globalization has made it possible for firms to internationalize and, as shown in Figure 2, there are many reasons why a firm might decide that it’s convenient for them to internationalize.

First of all, a firm’s main goal is the “generation of a greater return on its investment”

trade is facilitated by the government of both countries: for example, the EU has made it easier to transport goods between countries by eliminating tariffs for products of companies inside the EU.

Finally, strategic asset-seeking refers to the fact that firms seek opportunities to gain new knowledge to augment their FSAs, which can be done through research and development or through mergers and acquisitions that grant access to another firm's FSAs.

1.1.2 Entry modes²

“International Business” shows that there are two main ways of entering a new market: equity and non-equity entry modes. The difference between the two is that non-equity doesn't involve high commitment, meaning that the initial investment is low and doesn't include high losses in case of failure, while equity entry modes do.

Non-equity entry modes include:

- Exports, which can grant extra income through the sales of surplus product, for example. Export can be direct, where the firm itself takes care of the process, or indirect, which is less risky because it's managed through a distributor or a local agent, that will take care of all the export processing activities. For this entry mode, it's not necessary to know the destination market that well.
- Licensing: a firm is given access to some assets of the proprietary firm in exchange for a fee or royalty. This kind of contract has a set period of time, after which it can be renewed or ended. This system is used by Nestlé to sell KitKat in the United States, for example.
- Franchising, which is a kind of contract that works the same way that licensing does but in the context of service industries.

Equity entry modes usually come into place after the firm has gained more knowledge on the market it's targeting, decreasing the perception of risk for that country. Equity mode basically equals FDI (Foreign Direct Investment) and there are two types of equity modes:

- 1- Shared ownership, such as international joint ventures
- 2- Full ownership of a subsidiary in another country, which is something that can be done by acquiring any firm that possesses the assets that the company needs (like Nestlé did with many companies, such as Rowntree's Mackintosh and the Buitoni-Perugina group), or with a so-called greenfield investment, where a completely new business unit is set up in a foreign market.

² The information on this paragraph is taken from “International Business”, mostly Chapter 2.

It is widely believed that firms are risk-averse and will thus try to avoid taking risks, especially when entering a new market, unknown to them. In fact, the concept of “liability of foreignness” points to the fact that a foreign firm might face difficulties because of the disadvantage they have for not being native to the market. The “Uppsala Model”, developed by Uppsala University students, states that firms “*incrementally* increase their commitment to foreign markets by gradually acquiring knowledge about foreign markets and operations through experience” (Collinson et al, 2017), saying that the internationalization process is “path dependent”. This basically means that firms learn gradually from their own experience, in a process known as “learning-by-doing” and will direct their future trajectory depending on this accumulated knowledge.

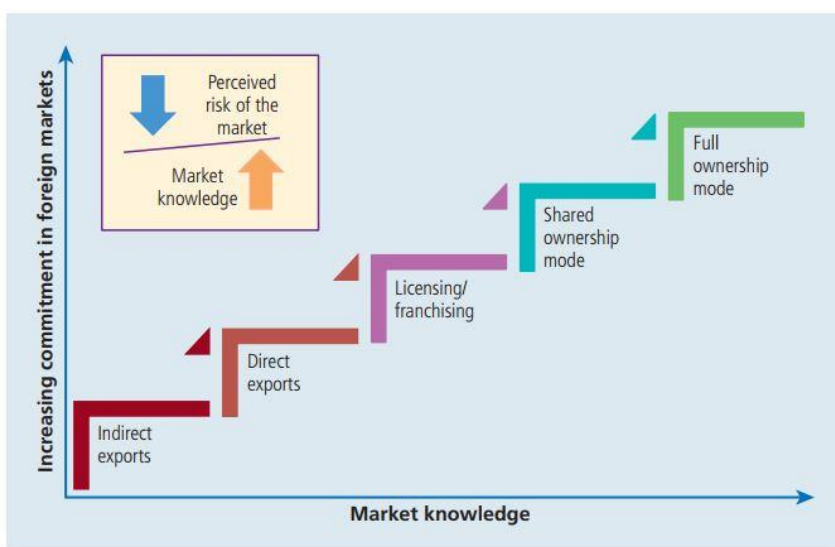


Figure 3 - Representation of the correlation between knowledge of the market and the perceived risk, leading to different levels of commitment in a foreign market. From “International Business”, page 59.

Accordingly, Figure 3 shows what the process of internationalization of firms normally looks like, putting emphasis on the fact that the level of market knowledge helps decrease the perceived level of risk of the market. In fact, a lower level of market knowledge naturally gives space to a higher perceived risk.

Firms will often act as shown in the picture, though it’s important to note that they don’t necessarily go through all the phases and might skip a few steps, depending on the situation they find themselves in.

1. Starting with indirect exports, which, as seen above, is the least risky of all the entry modes, firms might begin to gain extra income from extra sales. Firms will often use external specialists in the local market to make up for their lack of knowledge of said market. One of the advantages of this system is that it doesn’t require any long-term commitment.
2. When they start feeling more confident, firms might opt for direct exports. If exports become an important part of the business, they might set up an export department and the design or production process might be adapted to the export markets.
3. After that, come licensing and franchising, which are still non-equity entry modes, because another firm is responsible for selling the product, by paying a fee.

4. With more market knowledge they can go into equity entry modes, such as shared ownership with other firms.
5. Finally, there's full ownership mode.

Not all these steps are required and they're not mutually exclusive.

So, internationalizing business and activities can have a lot of advantages, it's an investment to potentially increase sales or to find new resources.

1.1.3 Organizational structures of MNEs³

So, when a company is just starting to internationalize, these international activities are sporadic and can be brought on individually, by exporting the products when needed, for example. As these activities grow in number and frequency, the firm might think of giving the job of managing all international activities to the marketing department or even of creating an export department, which "may report directly to the chief executive officer (CEO) or be a sub-department within the marketing area" (Collinson et al, 2017). The people operating might come directly from the marketing department or be hired from external agencies specialized in export management. Another thing that can be done is the creation of independent overseas subsidiaries that report directly to the CEO.

After some time has passed and experience has been gained, the business might think of creating an international division that takes care of all international operations, as opposed to the domestic division.

With more revenue deriving from these operations, a firm might take a step further by adopting a global structure, which can come in different ways:

- Global product structure, where domestic divisions have "worldwide responsibility for product groups", meaning that there's an independent division for each product, following the whole process of production, and each division sells this product internationally. The performance of each division is measured based on profit and this structure in particular is suitable for businesses with many product lines.
- Global area structure, which is a structure in which the world is divided into geographic areas that are the responsibility of area managers. There are thus regional divisions taking care of all functions in their area for all products being sold independently from headquarters, which makes it a decentralized structure. It is suitable for companies with not so many product lines, differentiated by geographic areas, as it helps the firm be more nationally responsive, with every division manager having the freedom to act autonomously.

³ Information mostly gathered from Chapter 9 of "International Business".

- Global functional structure, a structure based on the different functions carried out in the organization, where each function operates both domestically and internationally and reports back to the headquarters. It's a structure suitable for companies with a "narrow product line that has reached a plateau of global coverage" (Collinson et al, 2017).
- Matrix structure, "an organizational arrangement that blends two organizational responsibilities" (Collinson et al, 2017) out of the ones listed above.
- Mixed structure: it's a structure that combines the aforementioned structures to adapt to the firm's needs in the best way.
- Transnational network structure: this is also a mix of structures, and it "helps MNEs take advantage of global economies of scale while also being responsive to local customer demands" (Collinson et al, 2017). It's called "network structure" because it relies on a worldwide network that links the various subsidiaries around the world and that has nodes with the role of coordinating product, functional and geographic information. Just like the geographic structure, the units work individually, but they also communicate with each other, and the decision-making process is shared between all of them and headquarters, which coordinates the whole business, as it happens in the functional structure. Thus, each unit can take advantage of the resources available in the country they're set in, while also sharing their know-how, financial and marketing information, and ultimately being coordinated by headquarters.

Since a firm has various needs that need to be met in a flexible way, it's far more likely for an enterprise to have a mixture of these various organizational structures, rather than following just one.

1.2 The role of culture

Ball and McCulloch (1999) define culture as "the sum total of the beliefs, rules, techniques, institutions, and artifacts that characterize human populations"⁴, which are "learned" naturally by simply being born and living in a certain society. Culture plays a fundamental role in the way a business is conducted because it shapes the values that influence the way people, and thus customers, behave.

Collinson et al (2017) consider "language, religion, values, attitudes, customs, and norms" as the main elements of culture. Language is one of the most important elements. In fact, learning a language should not only include the grammar and morphology, but also the culture of the country, which seeps

⁴ Donald A. Ball and Wendell H. McCulloch, *International Business: The Challenge of Global Competition*, 7th ed. (Boston, MA: Irwin McGraw-Hill, 1999), p. 258.

into the way people express themselves. As an example, Collinson et al. state that even though English is used as a common language by people from all over the world, one should not think that speaking the same language takes away the underlying cultural differences, and that believing so can be dangerous, because it could lead to underestimating these differences.

Culture is not necessarily only connected to a specific country: there are subcultures, such as corporate culture, which defines “how the managers and employees of particular companies tend to behave” (Collinson et al, 2017). However, it’s also important that managers understand that different organizational structures or procedures might be needed for local employees of subsidiaries located in another country, even if they belong to the same company, so it will be of help to know the local culture. This is also important when working with firms from different countries because it affects the efficiency of their communication.

It’s proven that successful international firms have found success because they have “adapted not just products and services but their management practices to other cultural and institutional contexts” (Collinson et al, 2017). In 1996 Collinson published a study⁵ about how British small firms were fairing in Japan and observed that they tended to enter the market through joint ventures and collaborative alliances with Japanese companies. This is because they first wanted to know more about the local culture, share investment risks, since smaller firms have a lower level of financial assets and prefer lower-risk entry modes, and gain credibility with *keiretsu* networks. The Japanese market barriers included high costs of operation, such as taxes and the cost of life in general, the difficulty to recruit Japanese people – because working for a small foreign firm didn’t provide a special social status –, national standards and other government-related regulations that aren’t so easy to understand for foreigners, and high expectations of customers. The only way these firms managed to survive was through their ability to adapt to the new context, by innovating not only their products and services but also their management practices.

It is thus best for a company to make thorough research on the market they intend to enter, to understand the values that are important to the customers – in order to be able to communicate in the best way with them – their buying patterns and expectations, words that shouldn’t be used and so on.

Finally, when talking about culture and its impact, companies should beware of the psychic distance paradox. Knowing that culture and cultural differences might lead to incomprehension and inefficiency, when firms start to internationalize, they usually tend to avoid risks by expanding to countries that are closer to home, which have more in common with their own culture. However,

⁵ Simon Collinson, *Small and Successful in Japan: A Study of 30 British Firms in the World’s Most Competitive Market* (London: Avebury Press/Ashgate Publishing Group, 1996).

studies by O’Grady and Lane (1996)⁶ have found that this might not always lead to good results, as it induces to underestimate the actual differences between these countries, sometimes resulting in poor performance. This is called the “psychic distance paradox” and is another aspect of culture that needs to be considered.

2. Glocalization

Glocalization is a word born in 1980 from the merger of the words “globalization” and “localization”, popularized in the Harvard Business Review by sociologist Roland Robertson, who in turn seems to have taken inspiration from the Japanese term “*dochukaka*”, referred to Japanese global marketing strategies. Glocalization is defined as “the simultaneity of both universalizing and particularizing tendencies”⁷. As it can be guessed, this is a strategy that creates a good balance between the two opposing needs of selling the same product worldwide but also adapting it to the local market. We’ve talked about globalization and how it can be said that it led to a convergence of consumption patterns. Now we will also see the opposite need for adaptation to the country’s needs and tastes, referred to as national responsiveness.

Glocalization implies the idea of selling the same product worldwide but making adaptations to the local market, laws, customs, and consumer preferences and needs, making the product more appealing in the eyes of local consumers. This might be a considerable investment, but it also offers advantages, making the firm more competitive in the local market.

Let’s now see in more detail the two opposing forces that come from the spread of globalization in a world made of different countries with their own peculiarities and cultures: economic integration and national responsiveness.

2.1 Economic integration and national responsiveness

As firms started to internationalize, they have come to meet a new dilemma, two forces that need to be balanced to ensure the business’s success abroad. We are talking about economic integration and national responsiveness.

Often used as simply a synonym of globalization, economic integration refers to the fact that firms can now make products and distribute them throughout the world, without changing or adapting them

⁶ Shawna O’Grady and Henry W. Lane, “The psychic distance paradox,” *Journal of International Business Studies*, vol. 27, no. 2 (1996): 309–33. <https://www.jstor.org/stable/155287>.

⁷ Joachim Blatter, “Glocalization”, Britannica, May 21, 2013. <https://www.britannica.com/topic/globalization>.

to the country. It is in fact said that globalization might have homogenized tastes of people from different countries to some extent.

On the other hand, there's national responsiveness, which relies on the knowledge and understanding of the consumers of different countries and their tastes and trying to adapt the product to them. Also, national responsiveness is necessary to respond to the different regulations or national standards set by governments.

The fact that these two concepts are diametrically opposite to one another doesn't mean that a firm has to choose one or the other. There needs to be a good balance between the two, one that depends on the product being sold, the market that the business desires to enter, and the tastes of the consumers, their flexibility.

Figure 4 shows the ways these can be combined, with the vertical axis referring to economic integration, while the horizontal axis is national responsiveness. The grid is thus divided into four sections, each of which represents a combination of certain levels of need for economic integration and national responsiveness.

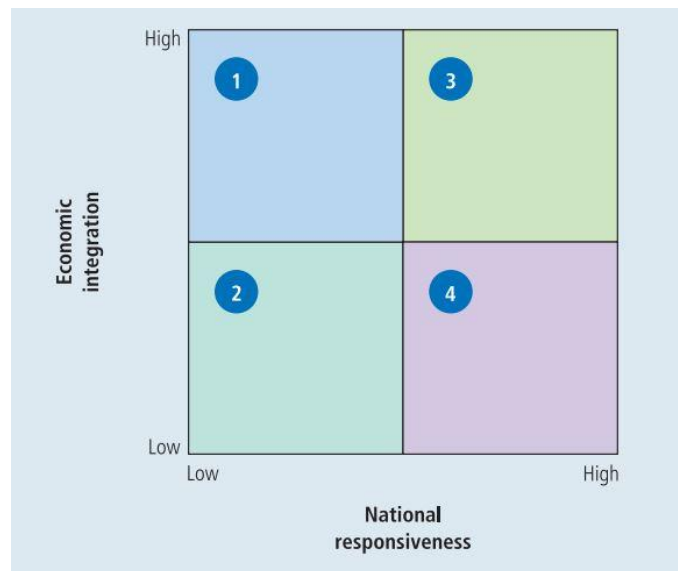


Figure 4 - Matrix considering national responsiveness and economic integration, from "International Business", page 333.

- 1- Square number 1 represents a high need for economic integration, with low need for national responsiveness, which is a situation where economies of scale are possible. In this case the firm can sell one product worldwide without the need to change it or adapt it to the market. With economies of scale, the strategy generally becomes focused on price competition.
- 2- Quadrant number 2 is a situation in which there's no need for either, so the firm can safely decide to go for the standardization of the product, since there's low need for national responsiveness.
- 3- Opposite of number 2, quadrant 3 has both economic integration and national responsiveness much needed, so there's a request for products that are integrated but also highly adaptable to the customers' needs and tastes.
- 4- This quadrant is the opposite of number 1, so there's a need for national responsiveness while not so much economic integration, so economies of scale can be ignored, because the main focus will be to adapt to the needs of the new market.

That being said, the positioning of the business in the matrix is not set in stone, one company can start at a certain point and then decide to move forward in another direction. When it comes to business management and strategies, in fact, it's always fundamental to be able to measure results and be flexible to change.

When dealing with national adaptation, it's important to not fall into the psychic distance paradox, which might lead businesses to underestimate the differences between countries because they are perceived as being very similar, while they actually have differences that cannot be overlooked. Two countries might be close, and might have cultural similarities at the first look, but at a closer look it might come to light the fact that they have substantial differences that would warrant some caution and request for a more detailed analysis as to how to satisfy the local consumers' needs. Ignoring these differences can lead to failure, as consumers might not find the product to their tastes.

2.2 Marketing strategy for international business

As a business thinks of internationalizing, the first thing to do will be an international market assessment, to understand which countries would be the best target for their activities. As explained by Collinson et al (2017), this generally entails six screenings, each one thinning the pool of possible candidates.

1. The first screening's goal is to understand what country might be interested in the product sold by the firm, by considering their import policies and what products they're already importing from abroad, or what their local businesses are producing, or the demographic changes that might create a new space in the market.
2. The second screening focusses on the countries' financial and economic conditions, so that the ones that aren't in a good situation can be eliminated from the list of candidates. For example, one can make estimations about the future of the demand for a product by analyzing the current trend or by seeing how it's going in other countries.
3. The third screening includes the political and legal forces at play. For example, entry barriers are very important when considering exporting a product, as well as the stability of the government and the protection of patents and copyrights.
4. The fourth screening involves the "socio-cultural forces, such as language, work habits, customs, religion, and values" (Collinson et al, 2017), which greatly influence the way people live and work.

5. The fifth screening will consider the competitive forces: a company might want to avoid markets with strong competition or choose to challenge it if they think the possible rewards outweigh the difficulties.
6. The final selection is usually made by physically visiting the locations with field trips and by talking to local actors.

The marketing strategy will then take form based on the information taken from these considerations.

The marketing strategy is often referred to as the 4 Ps, because its main subjects of discussion are the product, its promotion, placement, and price. Collinson et al. (2017) say that when targeting foreign countries, there are different strategies for each of said categories.

Starting with the product, one of the main things a company should think of is whether they should

modify the product or not. There is no fixed rule on what is right because it usually depends on the product itself. Collinson et al. (2017) list industrial goods and technical

Little if any modification required	Moderate amount of modification required	Extensive modification required
Heavy equipment	Automobiles	High-style consumer goods
Electronic watches	Clothing	Cosmetics
Notebook computers	Appliances	Prepackaged foods
Chemical processes	Pharmaceuticals	Education products
Writing implements	Aircraft	Advertising
Cameras	Athletic running shoes	Packaging
Tennis rackets	Television sets	Restaurant meals
Cigarettes	Beer	Health services
		Cultural products
		Consumer distribution

Figure 5 - Guidelines on products and the level of modification they might need, from "International Business" chapter 13, page 423.

services such as laptops or photocopying machines as products that don't need much modification. On the other hand, as shown in Figure 5, products such as pre-packaged foods and advertising might need extensive modification.

Economic, cultural, and legal factors often influence the need for modification, as well as the life cycle of the product itself. The economy of a country, in fact, influences the buying patterns of customers, their preferences, and their buying power, which will influence the attractiveness of the cost of the product in the eyes of local consumers. Also, economically advanced countries will probably need extras in the products, while poorer countries will be more suited to the basic model. Culture influences greatly the way of doing things, for example the way food is consumed, and thus sold or marketed, is different depending on the country.

A firm also must be mindful of the language(s) used because some countries use more than one language, such as Canada, and will need instructions and information in both languages. Food and

pharmaceuticals in particular are often affected by laws as well, which regulate their packaging, labelling and also their ingredients. Finally, the product life cycle is very important, because a product might not stay relevant forever, which will lead to the need of innovation and adaptiveness. Coca-Cola in Japan, for example, introduces new flavors approximately every month to avoid this problem, especially since Japanese people are very receptive to the kind of strategy that involves limited editions. “One of the most effective strategies has been to shorten the PLC by offering new goods and services before the demand for the old ones has dropped significantly.”, say Collinson et al. (2017). So, to maintain its market position, a firm should always try to surpass the older product and improve it.

Promotion is another part of the marketing strategy, and its goal is to stimulate the demand for the product. When promoting, the message the company intends to send is very important, and the firm might need to consider whether to adapt it to the different countries or not. As for the message, Ólafsson (2014)⁸ explains that globalization has brought to two ways of approaching new and different markets: standardization and adaptation. Standardization operates under the assumption that people around the world share the same feelings, that can be aroused in the same way notwithstanding the country of origin of the person. So, it should be possible to market the product in the same way in different countries without many difficulties. This would allow companies to sell their products worldwide without making many adjustments or investments. Adaptation, on the other hand, indicates the opposite way of thinking, where it’s seen as necessary to understand the local market and its consumers, and adapting the communication style where needed. For example, the language barrier is still a strong obstacle and simply translating commercials might not be enough, be it sufficient to think of the different kinds of humors that exist in the world.

In approaching different countries, Collinson et al. (2017) say that the firm might think of different courses of action, both for the product and for the message, depending on the situation:

- No changes to the product nor the message, which is possible when the product doesn’t require much modification to be sold in different countries, and if the firm believes that the message has a promotional appeal that can be appreciated in all those markets.
- No changes to the product but a different message, which is a viable solution when the product can satisfy the needs of customers from different countries and markets but different aspects of it can be appreciated from different customers, so the message needs to be adapted to convey the appropriate information.

⁸ Jón Björn Ólafsson. “Advertising to the Japanese consumer. Japanese advertising culture examined.” PhD Thesis. (2014).

- Modified product but same message, which can be used when the needs of the consumer, and thus the way that the product is promoted, are the same, but the market itself requires some modifications to the product.
- Modified product and modified message, which is the solution when both the ways the product is used, and the buying habits of the consumers are different and warrant differences from the home market of the firm.

There's no one-size-fits-all strategy, so neither of the four is always necessarily right or wrong, the right solution depends on various factors, such as the product itself, and on the industry. Collinson et al. (2017) state that often firms will use the same message worldwide, which reduces the advertising costs, but sometimes advertising needs to be adapted to the country, usually when the product is used differently or when the message doesn't make sense if translated. The main means of advertising are, in general, television, radio, newspaper and social media, with differences between countries given, for example, by restrictions: some countries prohibit comparative advertising or the advertisement of certain products whose use they want to discourage, in some countries there's censorship as well.

The internet has certainly become a very important means of communication that a firm cannot ignore when thinking of promoting their product, both for marketing purposes but also to make research on the market, the competition, and the customers. The website of the firm is a fundamental part as it creates the image of the company and is also an instrument to provide information to the customers, about the product but also the company itself, which is a way of creating credibility, a trust relationship with the users and to show the ethics of the firm. So, the internet can be used to spread a certain message all around the world in a process called online branding and also to monitor how people feel about the product, to see what kind of improvements might be needed.

The placement and the distribution of the product are also important and often differ from country to country, so the firm must consider the different distribution systems, which include the use of general line retail, limited line wholesale and retail, the use of cash or cards, supermarkets, and small stores. Also, firms will have to rely on intermediaries to sell their products, but those often operate in one country only, which makes it more difficult to standardize the distribution.

So, MNEs will have to consider various factors to decide what is the best distribution system for them and their product. One of the ways to choose the best distributor is by checking their financial strength, because they must be able to survive long-term, and they should also have good connections to provide "assistance in handling governmental red tape" (Collinson et al, 2017). Another factor to consider is how many product lines the distributor is already handling, because if they have many, they might not be too interested in adding new products or they might have other competitive products, which wouldn't be convenient for the firm. Also, "depending on the nature of the market and the

competition, the multinational may give exclusive geographic distribution to one local seller or arrange to have a number of sellers jointly selling the product.” (Collinson et al, 2017). For example, for food products there’s no need for exclusivity, so they can be sold from a variety of distributors.

As for the price, Collinson et al. (2017) give government controls, market diversity, currency fluctuations and price escalation forces as examples of factors that influence decisions regarding the price of the product. Some governments in fact dictate minimum and maximum prices and prohibit dumping (selling goods at a very low price) to protect local businesses. Other elements influencing the price are the perceived quality of the product, the level of the demand and tax laws. So, firms must adjust to these elements. Currency fluctuations also have a big influence, because the value of a certain currency decreasing might mean the decrease in the profit of the firm, for example. There are different strategies for pricing, some firms use a high-price strategy others use a low-price strategy, and this depends on elements such as the consumers they’re targeting and the nature of the product itself.

So, a firm that wants to internationalize will make a few screenings to understand what markets are the most likely to be good for the product the company wants to sell. After that, the firm will be able to think of the marketing strategy, deciding whether there need to be modifications to the product and the message through which it’s promoted, also considering its placement, including the means of distribution, and the pricing depending on the economic situation of the country.

Part II: Nestlé KitKat's example

3. About Nestlé

As anticipated, I'd like to take Nestlé KitKat's success in Japan as an example of a glocalization strategy done successfully. In order to understand how KitKat is managed, it's important to understand how Nestlé operates first, which is what we are now going to see. Nestlé's website makes a wide range of information available, from their history to their strategy making process, their philosophy, values, and management so I will now present the information that I find of interest to the subject of this thesis, starting from the company's history.

3.1 Nestlé's history⁹

The Nestlé Group was born when the Anglo-Swiss Condensed Milk Company, founded in 1866, merged with Henri Nestlé's company in 1905. Anglo-Swiss was the first producer of condensed milk in Europe, while Henri Nestlé, pharmacist, born in Germany but operating in Switzerland, developed milk for infants that couldn't be breastfed. The two companies naturally started to sell similar products, so they entered in competition, both growing locally and internationally, along with their range of products, until they merged in 1905. By that time, Nestlé had also started producing milk chocolate.

During World War I there was a shortage of resources but at the same time an increase in demand because condensed milk lasts long and is easy to transport. This led to the expansion of production facilities to the US and Australia. After the war, Nestlé had 40 factories throughout the world but faced a crisis due to the sudden decrease in demand. They managed to overcome it and, in the meantime, started launching new brands and selling other new products, such as chocolates, after merging with the largest Swiss chocolate company Peter-Cailler-Kohler, and American milk chocolate producer Fulton.

During World War II, Nestlé continued operating, relocating some managers in the US, and supplying Africa and Asia from there and from Australia. In 1947 the business expanded further with the merger with Alimentana, which added soups, bouillons, and seasonings to Nestlé's - which thus became Nestlé Alimentana - range of products.

⁹ Information from: Nestlé global. "Travel through our history timeline". <https://www.nestle.com/about/history/nestle-company-history>

After the war, Nestlé continued growing and, with the advancement of technology and the taste for convenience foods, launched Nesquik and several other products, continuing to acquire new businesses as well, such as Rowntree Mackintosh, maker of KitKat, and the Buitoni-Perugina group, makers of Italian pasta and sauce but also chocolate.

In 1997, CEO Peter Brabeck-Letmathe created Nestlé’s motto, which still characterizes the business’s goals: “Nutrition, Health and Wellness” reflecting the company’s history as it started as an activity that had infant nutrition and health at its core. In line with its goals and values, Nestlé launched the Sustainable Agriculture Initiative, promoting collaboration with local farmers. In 2006 “Creating Shared Values” is launched, with the meaning that any action by shareholders must bring values to the communities in which it is operating. Furthermore, to create sustainable supply chains in cocoa and coffee, the Cocoa Plan and Nescafé Plan were created. Nestlé also established Nestlé Health Science¹⁰, a wholly owned subsidiary focused on improving the customers’ health through nutrition by making research on healthy products while also considering sustainability.

The logo’s history¹¹



Figure 6 - Nestlé's first logo, from Nestlé global

The nest logo has been in place since Henri started selling milk for infants, in 1868. Before that, the logo was inspired by Henri Nestlé’s family coat of arms, which has a nest with a bird in the middle. Nestlé, in fact, means “nest” in German, which is why there’s a bird in its nest on the coat of arms.

From 1868 Henri kept the nest and added three baby birds being fed by the mother, to give a stronger image related to the fact that the products being sold are catered to infants and families. In 1938 the Nestlé signature is added on top of the logo, as shown in Figure 7.



Figure 7 – 1868 and 1938 logos from Nestlé global



Figure 8 – 1988 to today’s logos from Nestlé global

In 1988, the lettering of the brand is put under the logo and the baby birds are reduced to two. Then, through the years, the logo changed slightly in design, font, and colors, up until today’s logo, which is brown and softer than the previous ones.

¹⁰ Nestlé Health Science. <https://www.nestlehealthscience.com/>.

¹¹ Nestlé global. “The evolution of the Nestlé logo”. <https://www.nestle.com/about/history/logo-evolution>.

3.2 Nestlé’s mission and values

In their own words, Nestlé’s Purpose is to “unlock the power of food to enhance quality of life for everyone today, and for generations to come”¹². Nestlé’s core value is to provide healthy food for families, as it’s well represented by the logo with a mother bird feeding her children, symbolizing Nestlé’s involvement in a healthy lifestyle that allows a healthy growth for children. Nestlé’s motto is in fact, “We are Nestlé, the Good food, Good life company”.

Nestlé has its own rules and values, the Corporate Business Principles¹³, that must be followed by all employees throughout the world. Of course, they include a strict compliance with the law, and they also incorporated the ten principles of the United Nations Global Compact.

The values can be found on the company’s website¹⁴, where many files regarding the company are exposed for transparency on the company’s philosophy and work ethic.

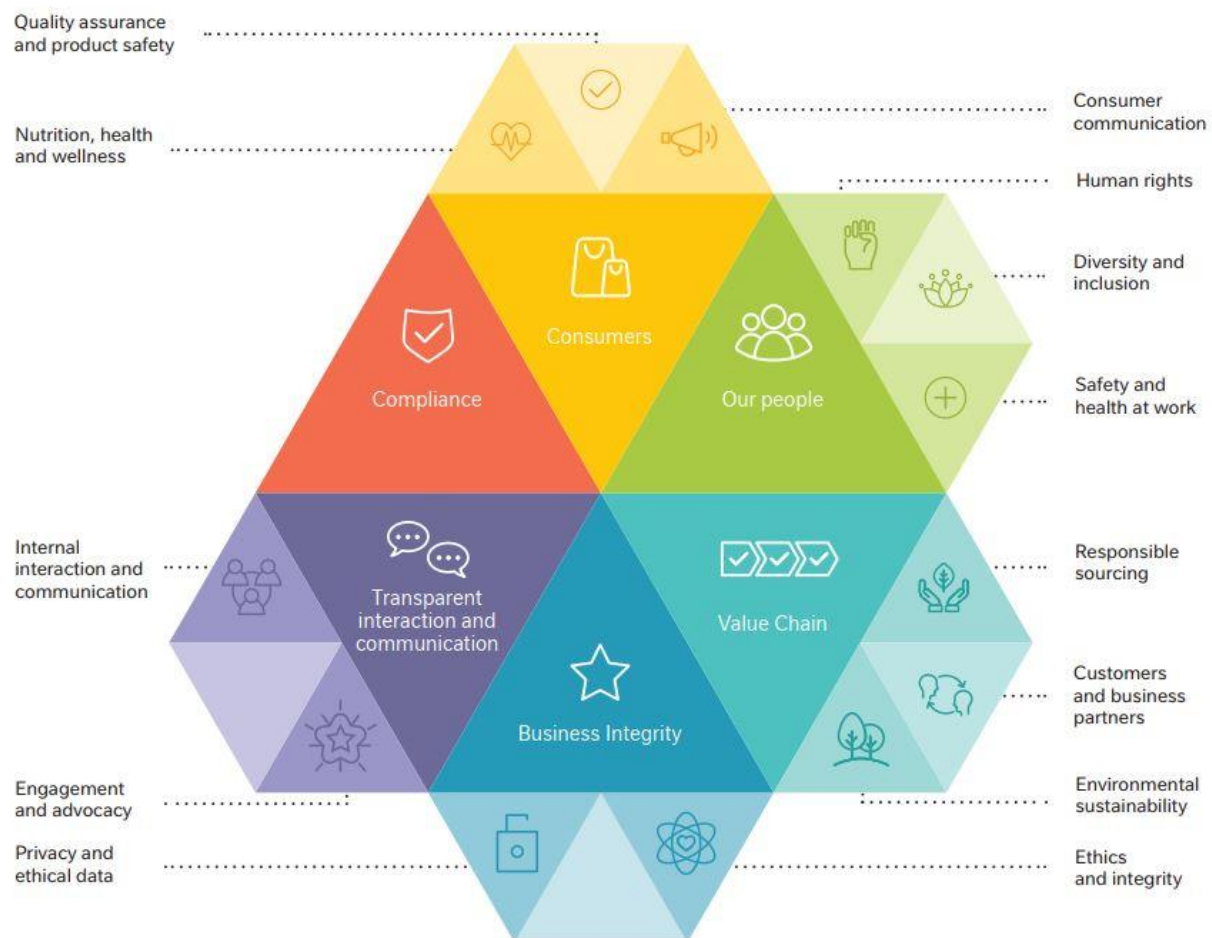


Figure 9 - Nestlé’s core values, from their “Corporate Business Principles”

¹² Nestlé global. “Nestlé purpose and values” 2021. <https://www.nestle.com/sites/default/files/2021-06/nestle-purpose-values-en.pdf>.

¹³ Nestlé global. “Corporate Business Principles” 2020 (source of Figure 9): https://www.nestle.com/sites/default/files/asset-library/documents/library/documents/corporate_governance/corporate-business-principles-en.pdf

¹⁴ Nestlé global. “Our Business Principles”. <https://www.nestle.com/about/how-we-do-business/business-principles>.

As shown in Figure 9, there are five main areas of interest for Nestlé values:

1. “Consumers”: a lot of emphasis is put on the provision of healthy food to families, so it comes as no surprise that one of the blocks of values is centered around the consumers, and offering them not only tasty but also good quality, affordable and safe products, that cater to the individual’s health and wellness, while also being transparent on nutritional information to encourage healthy eating and “empower consumers to make informed choices and promote healthier diets” (Nestlé, 2020)¹⁵, and not only that, but also promoting physical activity. The safety and quality of their products are guaranteed by their Quality Policy, that pushes them to maintain “high food safety standards in all countries in which we operate” and “product quality and safety by all employees and third parties involved in our value chain” (Nestlé, 2020). Since their products are catered to the family, they might also address children, but Nestlé states that they make sure that they do it in an educational way that does not undermine the parents’ authority. In fact, their Marketing and Sales, Corporate Communications, Strategic Business Units have also created a special Marketing Communication to Children mandatory policy to make rules clear. With the knowledge that approximately 5.6% of children in the world are overweight (as of the year 2020), Nestlé adheres to the new Global Responsible Marketing Policy issued by the International Food and Beverages Alliance, and the Framework for responsible food and beverage marketing communications, created by the International Chamber of Commerce. Nestlé thus doesn’t direct any marketing communication to children 0 to below 6 years of age. Also, they might direct marketing communications to children 6 to below 13 years old, but only complying to Nestlé Policy Nutrition Criteria and never for biscuits, ice-cream, beverages with added sugar, sugar, and chocolate confectionery (to state that a marketing communication is directed to children below 13 years of age, 25% or more of the audience should belong to that age group).¹⁶
2. “Our people”: showing care towards the employees is also a very important part of the working environment to show what the company’s true values are. Nestlé is showing that they care about human rights, inclusion and diversity, and safety at work. They state that they are working towards providing good working conditions for their employees, with good work-life balance and respecting human rights “in line with the United Nations Guiding Principles

¹⁵ Nestlé global. “Corporate Business Principles”. https://www.nestle.com/sites/default/files/asset-library/documents/library/documents/corporate_governance/corporate-business-principles-en.pdf.

¹⁶ Nestlé global. “Nestlé Marketing Communication to Children”. 2021. https://www.nestle.com/sites/default/files/asset-library/documents/library/documents/corporate_social_responsibility/nestle-marketing-communication-children-policy.pdf.

and the Ten Principles of the UN Global Compact” (Nestlé, 2020). They are thus against violations of human rights, such as child and forced labor.

3. “Value Chain”: the production chain is obviously fundamental in the creation of the product, and, in today’s society especially, it has to be responsible, environmentally sustainable and relying on business partners that are trustworthy. A business cannot only think about earnings and products, it is inevitably inserted in a social context that it cannot ignore and should thus take social responsibility for its actions and its activities in this world. Nestlé says that they are thus invested in responsible sourcing, and that, in fact, their suppliers have to abide to Nestlé’s Responsible Sourcing Standard. The two statements “We are committed to implementing sustainable agricultural practices that contribute to long-term production resilience, delivering sustainable livelihoods, reduction of carbon gas emissions, protection of biodiversity and the conservation and replenishment of natural resources.” and “We are committed to reduce our greenhouse gas emissions and achieve net-zero emissions by no later than 2050” (Nestlé, 2020) are shown to be put to practice both in their “Towards Net Zero Emissions” section in their webpage and in the KitKat websites we will analyze: the websites always state that KitKat chocolate is made with 100% sustainably sourced cocoa, that Nestlé is committed to reaching carbon neutrality and always mention the Nestlé Cocoa Plan. Nestlé is also invested in creating a circular economy by developing recyclable or reusable packaging and favoring the use of renewable resources.
4. “Business integrity”: this block is about the protection of personal and important information, which is crucial in this day and age, where everything is done online, and information can easily be shared. Making it clear that the company is working towards the safety of the customers makes the brand more reliable and look trustworthy.
5. “Transparent interaction and communication”: the opinion of both people who work inside the company and outsiders, especially consumers, is important to any business. In fact, making sure to be able to communicate with them in order to offer even more value in the future or solve any problem that the consumers don’t like is key for a long-lasting business.
6. “Compliance”: this means that all Nestlé employees are to follow the above-described values, the Nestlé Corporate Business Principles, and this is being ensured through training and monitored through communication. Finally, anyone can raise concerns when needed, anytime.

With consumers being such an important part of their values, it is only natural to first be very attentive to their tastes and needs before entering a new unknown market. These values are viewed differently from country to country, some might be more important in one country rather than another,

so it is important to know how they are perceived by different countries' consumers and which values to present to each country's consumers and how.

3.2.1 Nestlé's environmental commitment

Today, environmental issues are perceived very strongly by the public eye, so a business that wishes to be successful cannot ignore those elements. In this subsection I will see in more detail what Nestlé as a company aims to achieve from an environmental point of view, since their business has an impact on the environment.

“Towards Net Zero emissions”

Nestlé states that they want to change “to help restore the environment, improve the livelihoods of farmers, and enhance the resilience and well-being of communities and our consumers”¹⁷ and has disclosed information on how they aim to achieve Net Zero emissions in a page called “Towards Net Zero emissions”.

95% of Nestlé's greenhouse gases come from their supply chain, so they're working on different activities in the supply chain. Nestlé's goal is to reach net zero emissions by 2050: their plan is to

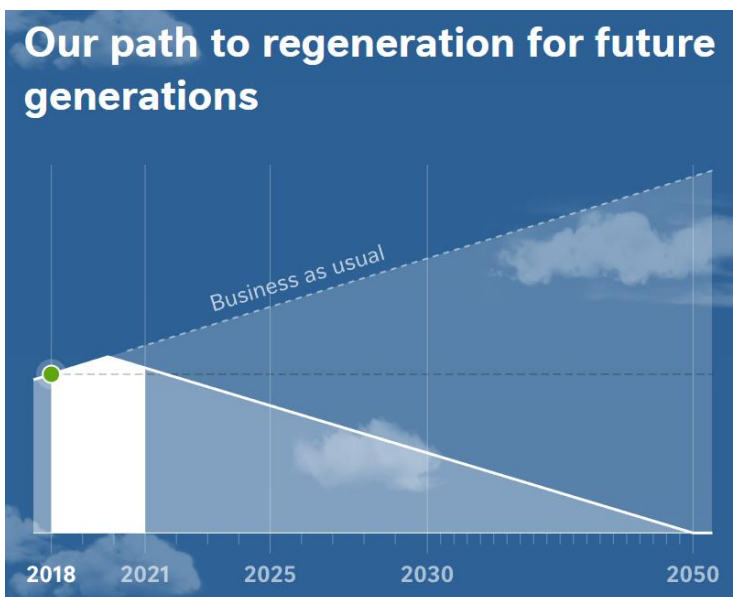


Figure 10 - Nestlé's plan to reach net zero emissions by 2050, from Nestlé global "Our road to net zero".

reduce them by 20% by 2025, then to 50% by 2030 and, finally, reaching net zero emissions by 2050, as shown in Figure 10.

Nestlé also states that they are committed to fight deforestation by planting 200 million trees by 2030, with their Forest Positive strategy launched in June 2021, which includes a Forest Positive External Advisory Council with the task to develop a science-based approach. In 2021, 97.2% of their ingredients were to be deforestation-free in their primary supply chains.

Nestlé is also trying to fight plastic pollution by recovering and recycling “as much plastic as we use in our packaging, on a 'one tonne in, one tonne out' principle known as 'plastic neutrality'”¹⁸. At

¹⁷ Nestlé global. “Our road to net zero”. <https://www.nestle.com/sustainability/climate-change/zero-environmental-impact>.

¹⁸ Nestlé global “Key actions to fight plastic pollution”. <https://www.nestle.com/sustainability/waste-reduction/actions-plastic-pollution>.

the same time, they state their commitment in trying to reduce plastic packaging and substituting materials that aren't easily recycled with paper: they're using paper packaging for products like Nesquik, KitKat, Smarties, and Nescafé, for example and switched to paper straws as well. "As of the end of 2021, 80% of our plastic packaging can be recycled and we expect to reach more than 95% by 2025. We remain committed to achieving 100%"¹⁹. While Nespresso has been carbon neutral since 2017, KitKat is expected to reach carbon neutrality by 2025.

"Towards net zero emissions in dairy farming"

Since Nestlé has a vast line of dairy products, they couldn't not touch the subject of dairy farming as well. In fact, they have stated that their vision is a future in which the dairy industry is a net zero emission industry, a goal they are set to achieve by 2050. To do so, they say they have been working together with farmers throughout the world.

On their global website they have shared some countries in which they are working²⁰:

- In the United States, there's an initiative called the Innovation Center for US Dairy Net Zero Initiative, which Nestlé has just recently joined, in 2021, and whose main goal is to "reduce environmental impacts by making sustainable practices and technologies more accessible and affordable to U.S. dairy farms of all sizes and geographies"²¹. Their common goal is "to achieve net zero carbon emissions, while optimizing water usage and improving water quality by 2050". To do this, for example, the farmers in Nestlé's supply chain in the US are to make sure that all the manure produced by their cows is used to fertilize crops or for bedding.
- In Germany as well efforts are made to go towards a future with lower emissions: for example, the manure is used to fertilize crops and the cows' diet has been improved to reduce the presence of methane, which is a greenhouse gas.
- The farm in George, South Africa, is making efforts to use manure effectively, separating solids and liquids and using both to their best. They are also relying less and less on external suppliers by growing their own animal feed.
- In Brazil "Nestlé is helping farms produce renewable energy and more milk with less environmental impact" (Nestlé, 2022)²² and, at the same time, trying to reduce waste.

¹⁹ Nestlé global "Key actions to fight plastic pollution". <https://www.nestle.com/sustainability/waste-reduction/actions-plastic-pollution>.

²⁰ Nestlé global. "Our vision: a net zero future for dairy farming". <https://www.nestle.com/sustainability/regeneration/supporting-dairy-farmers>.

²¹ US Dairy Net Zero Initiative <https://www.usdairy.com/getmedia/89d4ec9b-0944-4c1d-90d2-15e85ec75622/game-changer-net-zero-initiative.pdf?ext=.pdf>.

²² Nestlé global. "Our vision: a net zero future for dairy farming". <https://www.nestle.com/sustainability/regeneration/supporting-dairy-farmers>.

- Chile’s farmers are trying biofertilization, in the hopes of replacing synthetic fertilizers, which would be beneficial both to the environment and economically, since it would spare the costs of synthetic fertilizers.
- In Pakistan, Nestlé is engaged both socially and environmentally, training women “on dairy farm best practices that range from recycling manure, to improving animal nutrition and conserving water” (Nestlé, 2022).

So, Nestlé’s vision is that of a sustainable future where their carbon footprint has been reduced, and they’re trying to achieve it with different approaches in different countries, adapting to each situation and by finding different solutions that try to reduce both emissions and costs, to guarantee future growth and more sustainability.

*The Nestlé Cocoa Plan*²³

The Nestlé Cocoa Plan was launched in 2009, with the aim of producing great quality cocoa while also guaranteeing a good life quality to cocoa farmers, who are mostly located in Brazil, Cameroon, Dominican Republic, Ecuador, Ghana, Indonesia, Ivory Coast, Mexico, and Venezuela. The mission of this plan is summarized as follows: “Better farming, Better lives and Better cocoa”.

With “Better farming” Nestlé aims at a greater quality of the beans while also tackling sustainability, by affording the farmers proper training on more efficient harvesting tools and methods “to help them reduce disease in crops, improve bean quality, rejuvenate plantations and manage sustainable land use”²⁴.

The Nestlé Cocoa Plan is also aimed at giving farmers, with their families and their community, “better lives” by providing education to children and “providing an alternative to working in the field and broadening opportunities for the future”²⁵. Despite having been just recently accused of child labor²⁶ in the Ivory Coast, producer of roughly 45% of global supply of cocoa, Nestlé is restating that they do not condone child labor and that, through the Cocoa Plan, they plan on fighting against it, by improving the quality of life of cocoa-farming families thanks to an “income accelerator program” and making it thus possible for their children to access an education. This program has just been launched (January 2022) and its results will be monitored in collaboration with KIT Royal Tropical Institute²⁷, a center of research and expertise dedicated to sustainable development. “Better lives”

²³ Nestlé Cocoa Plan website. <https://www.nestlecocoaplan.com/>.

²⁴ Nestlé Cocoa Plan. “Better farming”. <https://www.nestlecocoaplan.com/page/2>.

²⁵ Nestlé Cocoa Plan. “Better lives”: <https://www.nestlecocoaplan.com/page/8>.

²⁶ Oliver Balch. “Mars, Nestlé and Hershey to face child slavery lawsuit in US”. The Guardian. February 12, 2021. <https://www.theguardian.com/global-development/2021/feb/12/mars-nestle-and-hershey-to-face-landmark-child-slavery-lawsuit-in-us>.

²⁷ KIT Royal Tropical Institute. <https://www.kit.nl/>.

also aims at providing women an education as well, by providing “popular literacy schemes for mothers in the communities” where they operate. “Maternal literacy is a key factor in improving nutrition, reducing child mortality, and reducing the risk of child labour”, states Nestlé.

Finally, “Better cocoa” points not just at a better quality of the cocoa beans, but also a better supply chain and a “forest positive cocoa”. Nestlé in fact is trying to make their supply chain “shorter and transparent” (Nestlé, 2022) by working with farmer cooperatives that “provide traceability and records for all their purchases from each farmer member” and is also trying to manage deforestation risks and have a positive impact on the environment by joining the Cocoa & Forests Initiative, launched in 2017. The fact they chose to take this kind of action in 2017 is probably not a coincidence, since it is the year in which Nestlé was involved in another scandal where Mighty Earth, an environmental group, found that the company’s practices contributed to Ivory Coast and Ghana’s deforestation problem²⁸.

Nestlé’s Annual Review extract from 2021 reports that thanks to their various projects they have attained 4 million tonnes of greenhouse gas emission reduction since 2018, primary supply chains that are 97.2% deforestation-free and 8.1% reduction in virgin plastic in their packaging since 2018.

The KitKat Italy website states that in December 2021, the Cocoa Plan’s results included 124.000 farmers accessing better farming practices, 16 million cocoa trees and 669.000 forest trees being planted, 53 schools made in the Ivory Coast²⁹. Also, in 2016 KitKat has become the first global chocolate brand to use 100% sustainably sourced cocoa.

3.3 Strategic management of MNEs: Nestlé’s management style

3.3.1 Nestlé’s management

After talking about Nestlé’s history, values, and environmental commitment, I would now like to see its management style. On the basis of the organizational structures of MNEs seen in subsection 1.1.3, we can say that Nestlé uses a mix of structures, namely the transnational network structure, since it has many product lines sold throughout the world by dividing it into zones, making it both easier to manage different products and to provide the needed flexibility to be nationally responsive as well, while also sharing the core values that represent the ideals of the company itself.

In compliance with their value of transparency, Nestlé’s site offers a lot of information on how they make strategies, how they’re managed globally and how they do business. On Nestlé’s website

²⁸ David Dee. “10 Outrageous Nestlé Scandals”. Listverse. January 3, 2018. <https://listverse.com/2018/01/03/10-outrageous-nestle-scandals/>.

²⁹ KitKat Italy. “Il Nestlé Cocoa Plan”. December 12, 2021. <https://www.kitkat.it/ultime-news/il-nestle-cocoa-plan>.

it's thus possible to find information on their management style and who is involved. As a company with an element of global area structure, Nestlé is managed separately according to market segments, called Zones. The world is thus divided in five Zones for most of Nestlé's food and beverage businesses:

- North America
- Latin America
- Europe
- AOA (Asia, Oceania, and Africa)
- Greater China

However, they also have businesses that are managed globally, such as Nespresso, Nestlé Health Science, and joint ventures like Cereal Partners Worldwide, established in 1991 between General Mills and Nestlé, as producers of breakfast cereals³⁰.

Nestlé has two bodies dedicated to the management of business, and the CEO, Mark Schneider, is a member of both: there's an Executive Board, that manages the day-to-day business, and a Board of Directors, which is "the ultimate governing body for the company (...) responsible for the long-term strategy and the ultimate supervision of the Group"³¹.

The Executive Board has fifteen members, of which five are the CEOs of the five Zones, while the other members have positions of importance in the finance, technology, human resources, governance, marketing and business development units of the company. The CEO of Nestlé Health Science is also a member. The Executive Board's role is to direct the conduct, management, and supervision of the business of the company, determining its organization and the accounting and financial control principles. If needed, it can create new committees for special matters or tasks. It also supervises activities to make sure they comply to the law and the Regulations of the company and making new rules and policies when appropriate. It prepares the Annual Report and the Compensation Report and decides what branch offices are to be established or closed. Amongst other things, it also decides the long-term strategy of the company and the investment budget, including investments and divestitures.

The Board of Directors has fourteen members, most of whom are former CEOs of various activities: there's Nestlé's former CEO Paul Bulcke, but also former CEOs of firms working in finance, the banking world, technology, the Global Consumer Company, climate-smart agriculture,

³⁰ Cereal Partners Worldwide. <http://www.cerealpartners.co.uk/>.

³¹ Nestlé global. "Our leadership team". <https://www.nestle.com/about/management>.

business, and consulting. There are also two members who are experts in Asian Markets, from China and Malaysia, with experience working in the respective markets.

3.3.2 Nestlé’s strategy

“Our long-term strategy is centred around respect for the future. We shape our portfolio with products that are right for consumers and set goals that contribute to a healthier environment.”³²

Nestlé is committed to offering healthy food for families, while at the same time preserving the environment and trying to reach carbon neutrality by 2050. As seen through their history, they have naturally internationalized and now sell their products all around the world, but they state that they want to focus their energies where food can make a positive impact on the environment and the lives of people, including their pets. They try to innovate through their own research and the insight from their customers, while also offering more plant-based food to adapt to their consumers’ diets and using packaging that protects the environment.

In their own words:

“We create value guided by three strategic pillars:

- *Growth through continuous innovation.*
- *Operational efficiency.*
- *Resource and capital allocation with discipline and clear priorities, including through acquisitions and divestitures”*
(Nestlé, 2022)³³

Nestlé’s strategy of growth is, in fact, based on the idea of having a “diversified portfolio, both in terms of geography and category”³⁴, which requires the ability to change environments and cultivation. Through innovation and portfolio management, they aim at a one-digit steady growth rate. Figure 11 briefly shows their growth rate in “affordable nutrition products”, “premium products”, “organic growth in high-growth categories” and growth “from recent acquisitions”, which is the biggest one, with 18,2%.

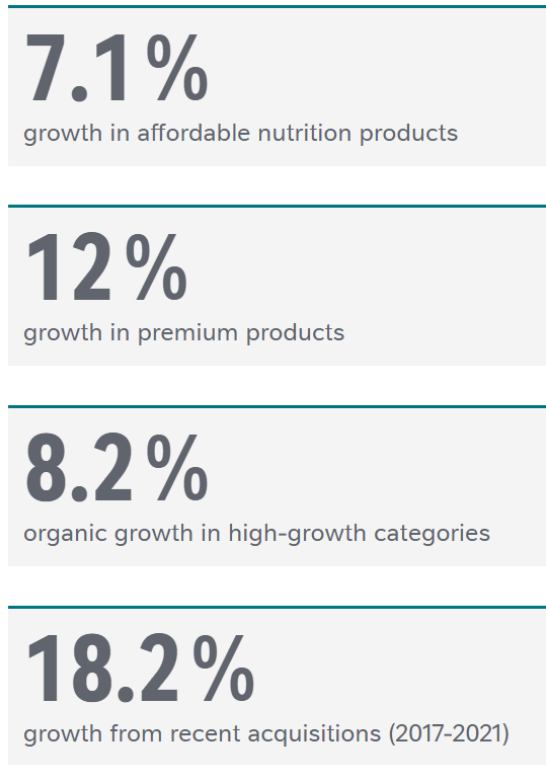


Figure 11 - Nestlé’s business “at a glance”, from Nestlé global “Pursuing our value-creation strategy”.

³² Nestlé global. “Pursuing our value-creation strategy”. <https://www.nestle.com/about/strategy>.

³³ Ibid.

³⁴ Ibid.

In fact, to expand business and their portfolio they have made many transactions, which include acquiring other countries' activities: in 2021, for example, they acquired The Bountiful Company, including Nature's Bounty, Solgar, Osteo Bi-Flex, Puritan's Pride, Ester-C and Sundown, Essentia, and Nuun. Cost management is part of the strategy because it's fundamental for the company's growth. The budget for these investments is fueled by the sales growth rate, which enables the company to make investments for "product innovation, brand building, digitalization and sustainability initiatives"³⁵. This has made the efforts to reduce the operational footprint possible, for example.

It is thus fundamental to allocate capital in the appropriate places, to "strike the right balance between growth, returns and flexible access to financial markets"³⁶. Nestlé in fact invests in R&D and supports projects which have a high potential to create economic profit. Of course, making investments and strategic choices is not only about acquiring new businesses but also about divesting in projects that don't bring profit: in 2021, for example, Nestlé divested in Nestlé Waters North American brands.

Nestlé has its own rules for mergers and acquisitions, regarding the Return on Invested Capital. In fact, potential businesses to acquire must have a "good strategic and cultural fit" with Nestlé's plans and objectives. Their strategy includes reinvesting in the business and increasing capital returns for shareholders, thanks to the increase of their dividend every year. Shareholders are repaid thanks to the strong free cash flow generation and business disposal.

In summary, Nestlé's strategy consists of investing in the innovation of products and research and development, with focus on the most potentially profitable sectors, thanks to which they can aim at a steady growth that will allow them to repay their shareholders and continue to invest in their own business to continue expanding.

3.4 Nestlé Japan

Let's now talk about Nestlé Japan. Nestlé Japan Ltd. started operations in Japan in 1913, while the company was created in 1933, and produces and sells beverages, food, confectionery, and pet food, with brands such as KitKat, Nescafé, Milo, Maggi, and Purina. As seen in subsection 3.3.1, Nestlé's business is divided into geographic areas, but each area contains many countries with different styles, markets and consumers, so it's very important to be conscious of that, lest be induced into falling into the psychic distance paradox, which leads to think that two countries that share some similarities and

³⁵ Nestlé global. "Pursuing our value-creation strategy". <https://www.nestle.com/about/strategy>.

³⁶ Ibid.

are usually geographically close can be treated the same way, both in the type of product to sell and in the way of communicating with consumers.

As it can be seen in the Japanese Nestlé website, Nestlé Japan abides to the rules and corporate values of the company. It's possible to download the Corporate Business Principles in Japanese, which are the same as the ones seen in section 3.2. To see how Nestlé Japan specifically is implementing these values, there's a "Creating Shared Value – Activities in Japan" page on their website.

It starts with a message from President and CEO of Nestlé Japan, Tatsuhiko Fukatani, who says:

*"As a Good food, Good life company, Nestlé Japan will continue pursuing innovation to realize food, beverages, nutritional products, petcare products and high value-added services to unlock the power of food to enhance the quality of life for everyone, today and for generations to come."*³⁷

This is the core of Nestlé Japan's activities, the first thing that the user can read when clicking on their "About us" section of the website, which respects and reflects the values expressed by the headquarters. Nestlé Japan thus states to be making efforts to not only provide healthy food but also information to improve the quality of life for "individuals and families", for "our communities" and "for the planet".

For "individuals and families" Nestlé Japan is trying to educate the consumers on the benefits of "3 Coffee a Day", which says that the right intake of coffee is three cups a day to guarantee physical, mental, and social health. They're also promoting Coffee Naps, where it's recommended to take a nap right after drinking coffee in order to naturally wake up energized after, since the lack of sleep in Japan is a social issue. One of the Corporate Principles that we have seen in fact includes the goal of having consumers make informed and healthier choices.

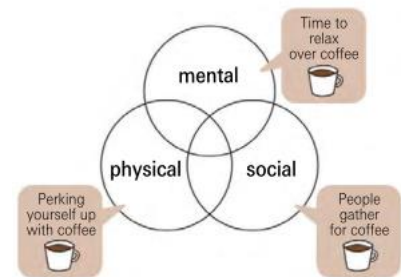


Figure 12 - Advantages of coffee as explained by Nestlé Japan

Nestlé Japan plans also on educating people on the importance of *matcha* green tea: in collaboration with the Prefecture of Kyoto, they have established the Matcha and Health Research³⁸, aimed at studying *matcha* green tea's health benefits and its effects on the quality of life of consumers.

³⁷ Nestlé Japan. "Creating Shared Value – Activities in Japan". 2021. <https://www.nestle.co.jp/sites/g/files/pydnoa331/files/2021-08/CSVreport-2020-japan-e.pdf>.

³⁸ Nestlé Japan. "Matcha and Health". <https://www.nestle.co.jp/nhw/matcha>.



Figure 13 - Picture taken in 2020 with INAC Kobe players "acting as Nestlé for Healthier Kids instructors", from Nestlé Japan

Furthermore, Nestlé Japan made an agreement with the City of Kobe for the “Kobe Genki! Iki-Iki!” project, where Nestlé Japan has created a “Nursing Care Prevention Café” in which the elderly can gather and socialize while drinking Nescafé provided by Nestlé. This is a project aimed at the revitalization of the local community. Always in partnership with the City of Kobe, in 2019 Nestlé became an “educational partner” with the women’s football club based in

the city, INAC Kobe Leonessa, and started educational activities targeted mainly at elementary school children to educate them in the subjects of nutrition and exercise, promoting a healthy lifestyle³⁹. Finally, Nestlé Japan is committed to providing healthier options of food and to being transparent on the nutritional information about their products, by writing them on the packaging.

For “our community” Nestlé Japan has launched various projects. During the COVID-19 pandemic they “donated KITKAT and NESCAFÉ products to the Japanese Red Cross Society, NPO Musubie - the National Children’s Shokudo (Cafeteria) Support Center, and the local governments of various regions” (Nestlé, 2021)⁴⁰. In 2021, they also gathered messages of encouragement through their Twitter channel and donated KitKats to nurses and doctors working in hospitals.



Figure 14 - Donations to the Japanese Red Cross Society, from Nestlé Japan

Always for the community, in 2019 Nestlé Japan launched the “Okinawa Coffee Project” in cooperation with Nago City, in Okinawa, and the University of the Ryukyus, which is aimed at giving new life to abandoned farmland in Okinawa by starting the cultivation of domestic coffee beans. Nestlé Japan has also been holding, every year, the “Innovation Award” internal contest, where employees can apply and tackle the problems that their consumers and modern Japanese society in general is facing, such as the declining birth-rate, just to name one.

“For the environment”, Nestlé Japan, in line with Nestlé’s goal of making “100% of its packaging recyclable or reusable by 2025” (Nestlé, 2021), has been working on improving the packaging of

³⁹ Healthier Kids on the Nestlé website: <https://www.nestle.co.jp/nhw/healthier-kids>

⁴⁰ Nestlé Japan. “Creating Shared Value – Activities in Japan”. 2021. <https://www.nestle.co.jp/sites/g/files/pydnoa331/files/2021-08/CSVreport-2020-japan-e.pdf>.



Figure 15 - KitKat Japan paper package, from Nestlé Japan

their products, including KitKat and Nescafé. They also state to be aiming at a circular economy to reduce waste. In Kobe, AEON and Daiei gave away points to people who help the collection of used Nestlé products' packages, using the "Kobe eco-action support app" called *Iikoto Gurguru*. Nestlé Nespresso Japan has also begun collecting used capsules to recycle some of their materials. Furthermore, with the launch of

KitKat paper package, Nestlé Japan also started the *KittoZuttoProject*, a series of educational videos regarding the environment, visible on Nestlé Japan's official YouTube channel.

Nestlé Japan is also moving towards rail and marine transportation rather than truck transportation because they have less of an environmental impact.

"In a joint project with Japan Freight Railway Company and All Japan Express Company, we began a new initiative in 2020 to make effective use of empty containers when transporting rice from Niigata Prefecture. In the past, empty containers were transported to the Niigata Kamotsu Terminal Station during the rice harvesting season. These empty containers were loaded with Nestlé products realizing an efficient logistics network." (Nestlé, 2021).

In conclusion, we can tell that the Corporate Business Values and the commitments and efforts that Nestlé has announced are translated into action in a declination that suits the Japanese public, by tackling specific problems of Japan's society, such as the lack of sleep and the decreasing birth-rate and collaborating with the local communities while working on the goals of sustainability and net zero emissions at the same time.

4. About KitKat

It is now time to talk in more detail about the product itself, KitKat: in this section, we will see what KitKat is in general, its history, as well as the history of the company that first produced the chocolate wafer bar, which is not Nestlé, but Rowntree Mackintosh. After that, we will explore the shape variety of the product and where it's sold in the world.

First of all, KitKat is a chocolate-covered wafer bar, which originally came in the shape of a bar with four fingers and in the milk chocolate flavor only. It has three wafer layers with chocolate between each layer, weighing 41,5 grams with 213 kcals for one bar. It can now come in a range of different shapes and flavors.

Its slogan, used worldwide aside from the US, is: "Have a break...have a KitKat!". KitKat

is sold by Hershey's in the US, where it has a different slogan: "Gimme a break, Gimme a break, Break me off a piece of that Kit Kat Bar!", or "Break time, anytime".



Figure 16 - Standard KitKat bar, image from KitKat Italy. <https://www.buonalavita.it/prodotti/kitkat/original>

4.1 The history of KitKat⁴¹

The four-finger chocolate bar's history started 87 years ago, in England, at Rowntree's York factory, after a worker asked for the creation of "a chocolate bar that a man could take to work in his pack up". It was first named "Rowntree's Chocolate Crisp", even though Rowntree had already trademarked the terms Kit Cat and Kit Kat in 1911. The origin of the name Kit Kat comes from the Kit-Cat Club in London, named after the chef Christopher Cat and which served mutton pies. Mutton pies don't have much to do with chocolate bars, but still, the name Kit Cat was first used by Rowntree in the 1920s for boxed chocolates that were later discontinued.

⁴¹ The information on this section are mostly from Nestlé global "KitKat", <https://www.nestle.com/brands/chocolate-confectionery/kitkat>, KitKat Japan "KitKat history", <https://nestle.jp/brand/kit/about/history/> and Wikipedia "KitKat" https://en.wikipedia.org/wiki/Kit_Kat.

The name Kit Kat was used later, after the discontinuation of said boxed chocolates to avoid any confusion, and in 1937 the Rowntree's Chocolate Crisp was changed to KitKat Chocolate Crisp. Only after the Second World War, did the name simply become KitKat. Other changes were prompted by the Second World War, because of the food shortages: the original flavor was milk chocolate, but from 1942 the dark chocolate flavor came to be, because of the milk shortage, as stated in the packaging, shown in the Figure 17:

“Because no milk can be obtained for chocolate manufacture, the Chocolate Crisp you knew in peace-time can no longer be made. Kit Kat is the nearest possible product at the present time”.



Figure 17 - Kit Kat's packaging during WWII, from Nestlé global “KitKat”.

During that period, the wrapping also changed from red to blue, going back to red again in 1949.

The slogan “Have a break, have a KitKat” was first used in 1958, and has been unchanged to today. In 1960, the two-finger version of the bar, shown in Figure 18, was created.



Figure 18 - Two-finger KitKat illustration from Nestlé global “KitKat”

The bar was very successful, so it started being exported to other English-speaking countries first, such as Australia, Canada, Ireland, New Zealand, and South Africa. The bar was then sold in Europe, in the US through the Hershey company and in Japan through Fujiya with a license.

In 1988, Nestlé acquired Rowntree Mackintosh and thus KitKat as well. Shortly after that, in 1989, Nestlé established their first production factory for KitKats in Japan, so that it could be produced directly there⁴².

KitKat's shapes and variety continued increasing through the years: in 1996 the first special flavor, orange, was produced in England, and in 1999, the KitKat Chunky, a one-finger bigger KitKat, weighting 50 grams, was introduced. After that, the variety kept on increasing, with a KitKat ice cream being launched in 2007, KitKat Ruby chocolate (four-finger KitKat bar made with pink ruby chocolate) in 2018, KitKat Christmas, with KitKats produced in the shapes of various Christmas characters being introduced in 2019.

In recent years, Nestlé also showed its interest in becoming more environmentally friendly through some movements: in 2016 “KitKat becomes the first global chocolate brand to use 100%

⁴² KitKat Japan. “KitKat history”. <https://nestle.jp/brand/kit/about/history/>

sustainably sourced cocoa⁴³”, then in 2020, in honor of their 85th anniversary, they announced their commitment to reach carbon neutrality by 2025, and in 2021 completely plant-based KitKat Vegan was launched in some countries.

As for Japan, Nestlé continued the collaboration with Fujiya until 2000, when Nestlé bought Fujiya’s share of the brand. The Japanese pronunciation of KitKat is キットカット (*kitto-katto*), which sounds like “きつと勝つとお (*kitto katsu to-o*)”, the Kyuushuu dialect for the phrase “きつと勝つよ! (*kitto katsu yo*)”, meaning “I (you) will surely win!” which is a coincidence that helped increase KitKat’s popularity in Japan, especially in the early 2000s. Japanese people, in fact, started to buy KitKats as lucky charms for students taking their entrance exams at first, and then to encourage people in general in different situations as well, such as sports and relationships. This is something that Nestlé picked up on and used to advertise the product, as we will see in the section dedicated to KitKat commercials in Japan. These are the years in which the number of special flavors started increasing in Japan. The first flavor developed in Japan was actually strawberry, which was sold between 1998 and 2000, but after that the special editions picked up the pace and increased quickly, the *matcha* flavor was introduced in 2004, along with lemon cheesecake, while in 2005 more than 8 flavors were sold⁴⁴.

KitKat’s success is demonstrated by the fact that between 2012 and 2014 Nestlé surpassed Meiji Chocolate as the top-selling confectionery in Japan⁴⁵, and this paved the way for the opening, in 2014, of the first KitKat Chocolatory, a boutique specifically dedicated to KitKat where expert chefs make special versions of the chocolate bar and where visitors can experiment the creation of their own bar. The Tokyo KitKat Chocolatory was the first to open in the world, followed closely by Australia.

So, KitKat’s history started before the Second World War and it managed to overcome difficulties by adapting to the situation, going then on to expand to other countries and creating more products, flavors and shapes on the way, and it recently also started showing commitment to the environmental issues that are one of the biggest problems of today’s society. As for Japan, Rowntree first and then Nestlé collaborated with Fujiya until the year 2000, when they bought Fujiya’s shares and also began creating more flavors and using the phrase “きつと勝つよ! (*kitto katsu yo*)” assonance in their marketing strategy.

⁴³ Nestlé global. “KitKat”. <https://www.nestle.com/brands/chocolate-confectionery/kitkat>

⁴⁴ Wikipedia Japan. “KitKat”. <https://ja.wikipedia.org/wiki/%E3%82%AD%E3%83%83%E3%83%88%E3%82%AB%E3%83%83%E3%83%88>

⁴⁵ Oliver Nieburg. "Nestle claims chocolate top spot over Meiji in Japan". Confectionerynews.com. <http://www.confectionerynews.com/Markets/Nestle-claims-chocolate-top-spot-over-Meiji-in-Japan>.

4.2 The history of Rowntree Mackintosh

To better understand KitKat's history, its development, and how it came to be sold all around the world, it's important to see the history of the growth of the company that started it all: Rowntree Mackintosh, which was an English confectionery manufacturer born from the fusion, happened in 1969, of the two companies Rowntree's and Mackintosh. We will now briefly see the history of both companies.

Rowntree's was born in 1862 in York and, after a couple of tries with different products, found success after 1881, the year of the launch of Fruit Pastilles, which are jelly-like fruit candies covered in sugar. By the end of the 1800s the company bought cocoa plantations in the Caribbeans and started to produce and sell chocolate bars as well. At the beginning of the 1900s they opened production sites first in the United States and in Germany, and then in Australia and Canada. They bought Cowan's, a cocoa producing Canadian company, in 1926, and in 1935 they started selling Rowntree's Chocolate Crisp, which would then be named KitKat. Rowntree went on to gain more success after launching Smarties in 1937.⁴⁶

As for Mackintosh's, it was a confectionery manufacturer as well, whose history began in 1899. They specialized in English toffee, with both crunchy and soft caramel, and they quickly started to export their products throughout the world, opening their American division in 1905. In 1925 they bought the Irish business North Kerry Manufacturing Company and in 1929 they founded the Anglo-American Chewing Gum Ltd and started selling chewing gum through vending machines. Their most famous product was the Quality Street, whose production became possible after they bought the chocolate production division A. J. Caley & Son from the United Africa Company. Through the decades, they kept creating new products and buying more companies, increasing their business, until, in 1969, Rowntree & Co. Ltd and John Mackintosh & Sons Ltd finally merged into Rowntree Mackintosh Confectionery Manufacturers, a huge business in the sweets sector. This decision was taken because Rowntree was risking being bought by an American company, the General Foods Corporation, so this merger was a move done to prevent that.⁴⁷

As for KitKat, after the merger, Rowntree Mackintosh licensed the product to Hershey Chocolate Co. in the United States and did the same with Fujiya to sell KitKats in Japan. Rowntree Mackintosh also continued to acquire new businesses abroad, like French Chocolaterie Lanvin, Dutch Nuts Chocolate Fabriek B. V. and entered the Australian market in 1972 by buying the confectionery

⁴⁶ Wikipedia. "Rowntree". <https://en.wikipedia.org/wiki/Rowntree%27s>

⁴⁷ Wikipedia. "Mackintosh". <https://en.wikipedia.org/wiki/Mackintosh%27s>

company Hoadley's Chocolates & Co. Ltd and their brands. They also opened an Italian subsidiary in Bologna.

In 1984 the group changed its structure and was divided into four operative units: Rowntree Mackintosh Confectionery Ltd., Rowntree Mackintosh Distribution Ltd., Rowntree Mackintosh Export Ltd., and Rowntree Mackintosh European Exports Ltd. The group proceeded to buy other businesses abroad, especially in America, until it was taken over by Nestlé in 1988, after it bought 15% of the business's actions.

4.3 The shape variety of KitKat

As stated in section 4.1, originally, KitKat exclusively came in the shape of a four-finger bar in the flavor of milk chocolate, except for when the circumstances of the war made it necessary to produce dark chocolate instead of milk chocolate. However, as the years passed, not only did the flavor variety increase, but also many different shapes were introduced, to fit the local consumers' tastes and needs. So, the original and most common form is the four-finger shape, but other shapes might be available as well, depending on the country:

- Two-finger: introduced in 1960, it has the same length as the four-finger but with only two fingers, so, to put it simply, it's basically half a KitKat.
- Chunky: launched in 1999, it consists of a single larger finger, approximately 2.5 centimeters wide, weighing 50 grams, which is more than one regular KitKat bar.
- Mini: a miniature version of the bar, with only two fingers and half as long as the classical size.
- Pops: sold in some countries, such as South Korea, it comes in the form of a bag with many little spherical chocolate and wafer balls.
- Bites: similarly to the Pops, they are little and come in a bag but instead of being spherical they are cubes.
- Christmas specials: only sold during Christmas and introduced in 2019, they include KitKats made in the shapes of different Christmas characters, available in different ways as the customer can choose, such as a bag that contains only Santa (Figure 19)⁴⁸, a bag with a mix of characters like Santa, snowmen, elves, or in the Advent Calendar as well. These products are sold without modifications in all countries that celebrate Christmas.



Figure 19 -
KitKat Santa
from KitKat
Italy

⁴⁸ Image from KitKat Italy "Kitkat Santa: a Natale è Kitkat a donare un break a Babbo Natale". November 21, 2020. <https://www.nestle.it/media/pressreleases/allpressreleases/kitkat-santa-natale-%C3%A8-kitkat-donare-un-break-babbo-natale>

- Easter specials: introduced in Easter 2020, similarly to the Christmas special KitKats, they are sold all around the world during the Easter festivities. The shape variety is not as rich as the Christmas dedicated characters: there is an easter bunny shaped KitKat and little easter eggs, which can be bought separately or in a kit that contains them all, as shown in Figure 20.



Figure 20 - Easter KitKat kit, from KitKat Canada

- US shapes: KitKat US is sold through a license by Hershey’s and has different sizes for the needs of American customers. Aside from the ones already seen above, there’s a king-size four-finger bar, which is bigger than the regular one, with more coatings, one-finger miniatures, and a king-size Big Kat (the Big Kat is the equivalent of the Chunky bar).
- Aside from the aforementioned two-finger and four-finger KitKats, there’s variety in the number of fingers as well, ranging from eight to eleven-finger KitKats sold in different countries in the world, as we will see in section 4.6.

It’s important to keep in mind that this doesn’t necessarily mean that all countries sell all these shapes, but rather that there’s a range of sizes and shapes that are used to adapt to the consumers’ tastes, needs and preferences.

4.4 KitKat Chocolatory

A KitKat Chocolatory is a special boutique where KitKat lovers can buy special editions of KitKats, and where expert chocolatiers think and create more luxurious bars with high-quality ingredients, and also where people can go and experience firsthand the process of creation of a bar, by making their own personal bar themselves.

The very first KitKat Chocolatory opened in 2014 in Japan⁴⁹, whose KitKats are very popular both in the country and outside of it. The boutique was opened in Shibuya and has special bars created in collaboration with Le Patisserie Takagi, a *patisserie* with which KitKat had already collaborated at the beginning of the 2000s, when KitKat Japan created a special edition for Valentine’s Day. In the shop, it’s possible to purchase many things: there are special creations made by the chocolatiers, and then there’s the possibility to make your own KitKat bar. The customers will be assisted every step of the way in the creation of their bar, following the instructions of the person responsible. The process includes choosing the kind of chocolate to use, cutting the wafer bar, putting the four fingers

⁴⁹ Nestlé global. “The world’s first ever KitKat boutique opens in Japan”. January 17, 2014. <https://www.nestle.com/media/news/kitkat-boutique-japan>.

in the melted chocolate and putting toppings on the bar, such as dried fruits, flowers and marshmallows. After that, the process includes waiting for an hour for the chocolate to solidify in the freezer, time during which people can drink at the bar or play the KitKat Piano, available for anyone who wants to play it.

There was more than one Chocolatory in Japan but, probably as a consequence of the Coronavirus pandemic, the boutique that was in Osaka has closed in October 2022. It probably closed because, though there were also Japanese customers, with the impossibility to enter Japan many foreign potential customers were prevented from visiting, which might have led to a decrease of visitors that led to this outcome. The Chocolatory also exists online, where the products are and will still be available.

After the Japanese Chocolatory, others opened in the world, in Australia, the UK, then Hong Kong, Brazil and Canada, some of which were created as a temporary experience, others permanent. The essence is always the same: more variety with higher quality chocolate, creations by expert chocolatiers, the possibility to create your own mix with different flavors and the chance to create your own bar.

The Chocolatory in the UK was held in York, place of birth of KitKat, and was a temporary experience for January 2020 only, where it was possible to create a personal eight-finger bar or buy a special six-finger bar, in the flavors of “Gin and Tonic”, “Springtime in Japan” and “Billionaires Treasure”⁵⁰.

The Hong Kong Chocolatory⁵¹ was temporary as well, held in 2021, and was developed in collaboration with Japanese pastry chef Yasumasa Takagi, owner of Le Patisserie Takagi, providing one-finger high-class KitKats in 17 flavors, namely the Sublime series from Japan. This event also included a promotion through which a customer could redeem a Japanese ceramic cup if they spent a certain amount of money.



Figure 21 - Picture from the Hong Kong Chocolatory pop-up store, from The Loop HK – The best of Hong Kong

⁵⁰ York’s Chocolate Story. “KitKat Chocolatory at York’s Chocolate Story”. <https://www.yorkschocolatestory.com/experience-chocolatory/>

⁵¹ Yannie Chan. “Spotlight: KitKat Chocolatory”. The Loop HK – The best of Hong Kong. April 7, 2021. <https://theloophk.com/spotlight-kitkat-chocolatory/>

Brazil and Canada's Chocolatories seem to be permanent. Brazil Chocolatory's website has been created in 2019, so we can assume that was the year of establishment of the chocolate factory. As for Canada, the Canadian Chocolatory had a pop-up event in 2019 first and then the opening of a permanent Chocolatory was decided.

4.5 KitKat's expansion

What countries is KitKat sold in? As already stated in section 4.1, KitKats were first sold only in the UK, and then, in the 1950s, expanded to Commonwealth countries, such as Australia, Canada, New Zealand, Rhodesia and South Africa, where Rowntree was already active. KitKat further expanded in the 1970s, establishing their presence in Europe by creating a new factory in Germany, and also in Japan through Fujiya and in the US through Hershey company. In 1988 Nestlé bought Rowntree, and in the year 2000 they also acquired Fujiya's share of the brand, expanding further in Japan, Russia, Turkey, Venezuela, and Eastern and Central Europe.

Figure 22 shows the expansion of KitKat's reach through the world, from 2015 to today, thanks to the illustrations created by Emilio Mondragón⁵². China has been reached in December 2015⁵³, followed by Perú, Guatemala, Honduras, El Salvador, Nicaragua, Costa Rica and Panama. In 2018 (third image from the top of Figure 22) we can see that all of the Central African countries have been added and Bolivia as well in the South American continent.

At this point KitKat had almost reached every country in the world but the consequences of the Ukrainian war in 2022 are already visible from the fact that Russia has been excluded from business in the bottom picture of Figure 22. On the other hand, the only countries that it never reached were Cuba and Guyana for the American continent, Morocco, Western Sahara, Tunisia and Mozambique for the African continent, Belarus, Albania and Georgia for the European continent, Kazakhstan, Uzbekistan,



Figure 22 - KitKat expansion from 2015 to 2022 from Wikimedia Commons.

⁵² Wikimedia Commons. "KitKat world map". https://commons.wikimedia.org/wiki/File:KitKat_World_Map.png.

⁵³ Ibid.

Turkmenistan, Afghanistan, Tajikistan, Kirghizstan, Mongolia, Nepal, Bhutan, Bangladesh, Laos, Cambodia and North Korea for the Asian continent and Papua New Guinea for Oceania.

4.6 KitKat's websites around the world

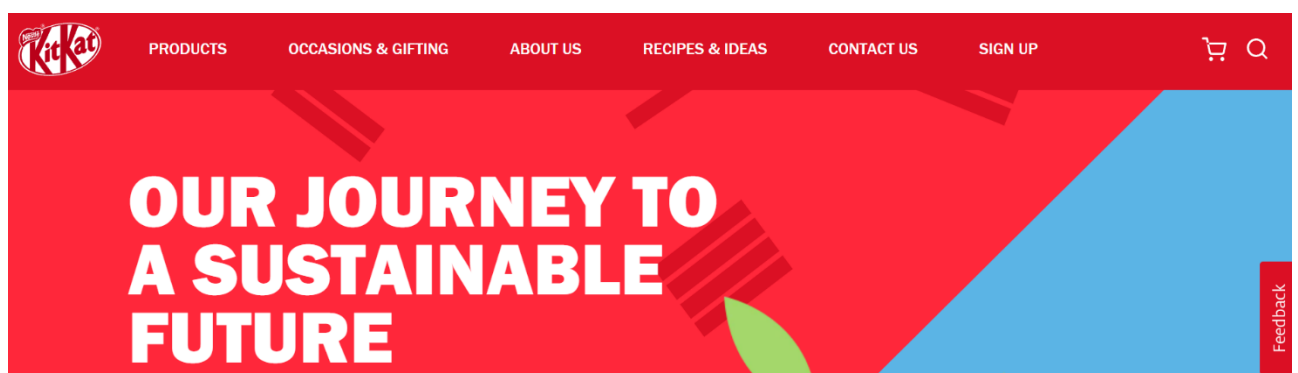
That being said, in what forms is KitKat sold all over the world? I have used the web pages of Nestlé and KitKat to see the differences between countries. Most of the countries in which KitKat is sold don't have a KitKat specific website but rather a KitKat page on their Nestlé website. The Nestlé website has a global version and then local versions for all the locations it has business in, dividing them into four zones: Africa & Middle East, Americas, Asia & Oceania, and Europe, so I will be considering each of them to see the differences and draw conclusions on the organizational structure Nestlé uses to manage the different locations in which Nestlé is active.

In mid-2022, the KitKat specific websites seem to have been changed and given a more uniform format. The sites have been adapted to the country they belong to, but they all share some common points to give a sense of continuity.

The points they all have in common include the color scheme, in fact the color with which KitKat is associated is red because of its original packaging, the structure and a mention to the Nestlé Cocoa Plan that every website mentions. Most of the KitKat specific websites also have a section with recipes that use KitKat to make special cake or milkshakes.

For reference, the structure of a KitKat specific website⁵⁴ will have:

1. A homepage with a menu bar with options to choose from, followed by highlighted contents at the top of the page



2. A quick glimpse to some of the products

⁵⁴ Figures from KitKat Arabia <https://www.kitkat Arabia.com/>, KitKat Canada <https://www.madewithnestle.ca/kit-kat> and KitKat Italy <https://www.kitkat.it/>

LE NOSTRE GAMME



3. Posts from their social media pages



4. A more detailed list of products, called the “Product Carousel”

PRODUCT CAROUSEL



KITKAT® MINI MOMENTS DESSERTS BAG
17GX1

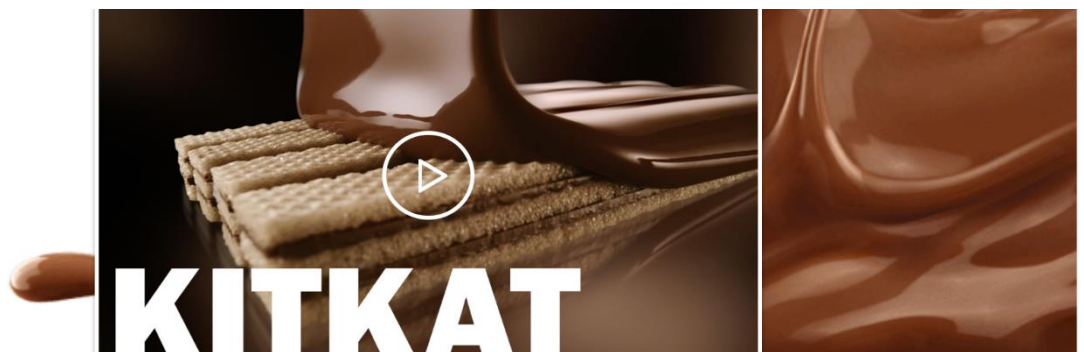


KITKAT® MINI MOMENTS BAG - CINNABON
17GX1



KITKAT® MINI SHARING BAG
10.5GX1

5. Commercial videos



6. A section with their recipes using KitKat



EVERYDAY



BIRTHDAY



HALLOWEEN



CHRISTMAS

With the menu at the top, the user can also choose to go and see the details of Nestlé projects, such as the Nestlé Cocoa Plan in the “About Us” section.

In the following subsections I will examine the websites from different countries, considering the shapes and flavors that are provided. As we will see, the main difference lays in the variety of KitKats being offered to the consumers. I will see in more detail the websites of the countries that have a KitKat specific website and give general information on the countries that only have a Nestlé website.

4.6.1 Africa & Middle East

The Africa & Middle East area of the Nestlé website is divided as follows: Central-West Africa, East & Southern Africa, Middle East & North Africa, and then Iran, Israel, and Turkey as standalone countries. The only countries that have a specific KitKat website instead of a page on the Nestlé website are Arabia and South Africa, which we will see shortly.

Central-West Africa’s Nestlé KitKat page simply describes the product in its original form, the four-finger milk chocolate bar, and has a link to the Nestlé Cocoa Plan. As for the East & Southern Africa KitKat page, it briefly shows the most important points of KitKat’s history, leaving a link to the Nestlé Cocoa Plan at the end of the timeline. Then, there’s a list of products sold, which include the four-finger in milk, white and dark chocolate, the KitKat chunky, the two-finger in milk and white, the eleven-finger in milk, dark and white chocolate, the “Fun Bag” with single fingers available in milk and white chocolate, and finally the KitKat Popchoc, containing little cubes of KitKat. There’s finally a link to their KitKat website, which is the South Africa web site which we’ll see in the next section, and links to the Facebook and Twitter pages. The Iranian Nestlé website, available in English or Persian, explains what the chocolate bar consists of and offers curiosities about how many people are consuming the product in the world and how many calories it has. At the end there’s also mention of the Nestlé Cocoa Plan. On the other hand, Israel doesn’t seem to have a page on KitKat, while Turkey just offers general information on the product, which seems to be only the original milk chocolate bar, with a link to buy it. The Middle East & North Africa Nestlé website KitKat page

offers a few general information, much similar to the Iran page, about the calories and the portion size range, then a link to the Cocoa Plan and a link to the Arabian website.

Let's now see in more detail what the Arabian and South African KitKat websites have to offer.

*Arabia*⁵⁵

As of April 2022, the site was not visible, but thanks to the changes adopted later on, it became visible from outside the country as well. This KitKat website, in English, has the top page advertising Nestlé's plan to reach carbon neutrality by 2025, highlighting the company's efforts for the environment as the first impression to leave to the visitors of the page. After that, we can see a list of their products, which include classics, special editions, seasonal products, and minis. Then the website continues by showing the latest posts shared on their Facebook page and video commercials at the end. There are also sections dedicated to the Nestlé Cocoa Plan and to recipes that use KitKat in original ways.

To be more specific on the range of products they offer:

- The "classics" include four-finger milk and white chocolate KitKat, two-finger in the flavors



Figure 23 - KitKat chunky in the flavors of Lotus Biscoff and Cinnabon, from KitKat Arabia

of milk chocolate, Arabic coffee, cookie crumble and hazelnut, chunky bars in milk chocolate, Lotus Biscoff (made in collaboration with Belgian bakery Lotus Biscoff⁵⁶, the bar contains a "crunchy caramelized Lotus Biscoff spread and crispy biscuit"⁵⁷), and chunky Cinnabon (born from the collaboration with Cinnabon, an American bakery known for cinnamon products such as cinnamon buns, the wafer chocolate bar contains a filling of Cinnabon cream⁵⁸).

- The minis are produced locally, always with 100% certified sustainable cocoa. They all come in bags and include the mini chunky, mini Cinnabon chunky and mini Lotus Biscoff, then the original mini and two bags of mixed minis, one with the flavors of milk chocolate, caramel, cookies and cream, hazelnut and mocha, and the other one dessert themed, with tiramisu, cherry brownie, strawberry cheesecake and crème brulee.

⁵⁵ KitKat Arabia. <https://www.kitkatarabia.com/>.

⁵⁶ Lotus Biscoff. <https://www.lotusbiscoff.com/en-us/about-us>.

⁵⁷ KitKat Arabia. "Chunky Lotus Biscoff". <https://www.kitkatarabia.com/products/kitkat-chunky-lotus-biscoff>.

⁵⁸ Cinnabon. <https://www.cinnabon.com/>.

- The seasonal products, as of December 2022, include the Arabic coffee two-finger bar, and KitKat Ramadan Icons⁵⁹, with Ramadan-shaped chocolates, as shown in the Figure 24.
- Finally, special editions, as of December 2022, advertise the aforementioned Cinnabon collaboration and a raspberry flavor two-finger bar.



Figure 24 – “KitKat Ramadan Icons” from KitKat Arabia

So, we can clearly see that they made an effort to adapt to the local needs and the country’s culture, by, for example, introducing a special product that celebrates an important event such as Ramadan.

South Africa⁶⁰

In April 2022, the link to the South African site brought to a site that only reported Facebook posts, which mostly only advertised the classic milk-chocolate four finger KitKat and its possible uses in recipes, in cakes for example, but no special editions or flavors different from the original.

As of October 2022, the site seems to have been changed. It doesn’t consist of only Facebook posts, but is much similar to other countries’ sites, advertising the different types and flavors of the chocolate bar. The site can be divided in a few sections, which are similar to all the KitKat specific websites, the first advertising a current promotion, where it’s possible to win a trip to New York to watch World Class Comedy. Then, there’s a section showing some of the products available. After that, the Nestlé Plans for sustainability and community support are shown, followed by a sample of posts from their Facebook page and commercial videos. Finally, there’s a “Product Carousel”, showing all the available products. The flavor varieties include original milk chocolate, white and dark chocolate, and peanut butter available only for the Chunky bar.

The shape varieties are as follows:

- Four-finger: 41.5 grams, in milk, white and dark chocolate.
- Eight-finger: 85 grams, in milk and white chocolate.
- Eleven-finger: 135 grams, in milk, white and dark chocolate.
- Minis, which are available only in milk chocolate in a 200 grams bag.
- Chunky, in milk chocolate and peanut butter.
- Santa shaped chocolate for Christmas.

⁵⁹ KitKat Arabia. “KitKat Ramadan Icons”. <https://www.kitkatarabia.com/products/kitkat-ramadan-icons>.

⁶⁰ KitKat South Africa. <https://www.kitkat.co.za/>.

This variety was something that before the update was not visible, so it wasn't possible to tell the varieties of KitKats in South Africa before that and it is to determine whether that is because they weren't sold or simply because they weren't advertised.

Summary

In conclusion, most of the countries don't have a specific KitKat site, but they all at least give the basic information on the product and how it's part of the Nestlé Cocoa Plan. The South African KitKat website is somehow representative of what is available in the East and Southern Africa area, while the Arabian KitKat site covers the Middle East and North Africa. While the South African products mostly seem to have a variety of shapes, the Arabian products provide variety in both shapes and flavors.

4.6.2 The Americas

The American area is divided as follows: Argentina, Bolivia, Brazil, Canada, Caribbean, Central America, Chile, Colombia, Dominican Republic, Ecuador, Mexico, Paraguay, Peru, United States, Uruguay, Venezuela, of which only Brazil, Canada, Mexico, and the United States have their own KitKat website.

As for the Latin American countries, most of them have a Nestlé page rather than a specific KitKat website and on the landing page the user can usually chose between “Shop”, “Products”, “Stories” and “Nestlé in society”, which always highlights the efforts of the company in environmental and social issues, stating that KitKat is the first global confectionery company producing chocolate from 100% sustainable cocoa.



Figure 25 - KitKat cappuccino from the KitKat Chocolatory Brazil website

The variety of products always includes the four-finger, and for some countries the two-finger, minis and chunky. There's a special edition in the flavor of *cappuccino* (shown in Figure 25) for most of the countries, as well as the celebrative Easter Bunny or Santa depending on the festivities. The Caribbean has KitKat Pop Choc, two, four-finger bars, chunky, and also a ten-finger bar in special flavors: dark with orange and dark with raspberry.

Let's now see the KitKat specific websites.

*Brazil*⁶¹

The Nestlé website brings you directly to their KitKat Chocolatory website. In fact, Brazil is one of the few countries where a KitKat Chocolatory resides, allowing customers to buy personalized products, and see special limited editions. On the KitKat Chocolatory site, there's a vast choice of KitKats.

First off, we have the classic four-finger in milk, dark, white chocolate and *cappuccino*, then, there's a lot of themed boxes, seasonal editions (as of November 2022, there are Christmas specials, such as the Santa shaped KitKat and a box named "I love Christmas") and, of course, the possibility to create your own mix, which consists of choosing KitKats in the flavors you prefer and mixing them in a personalized box.

There's a series of boxes named "I love...", with different themes, all containing eight KitKat minis. An example is shown in the Figure 26. They all weigh 92,8 grams and are themed as follows:

- "I love Christmas", which is a box with gingerbread flavored KitKats.

- "I love Brazil" (two versions): the first edition has *pamonha* (typical Brazilian dish), *caipirinha*, *jaboticaba* (a Brazilian tree) and *pacoca* (a traditional Brazilian sweet) flavors, while the second edition has KitKat in the flavors of *guarana* (a plant typical of Latin America), *acai*, Romeo and Juliet and *beijinho* (typical birthday candy made with coconut and condensed milk).



Figure 26 - "I love Japan", "I love Brazil" and "I love Gringos", from the KitKat Chocolatory Brazil website.

- "I love Gringos". "*Gringos*" means "foreigners", so the box is meant to celebrate dishes from other countries known world-wide, such as the blueberry cheesecake, *crème caramel*, cookies & cream, and apple & cinnamon.
- "I love Japan". Japan is the only country outside of Brazil with a whole box dedicated to it. The flavors included are *matcha*, wasabi, *sakè*, and melon, written as "*meron*" referring to the

⁶¹ KitKat Chocolatory Brazil: <https://www.kitkatchocolatory.com.br/loja>

Japanese pronunciation of the word. Japan having its own box can be explained by the fact that Brazil is home to the largest Japanese community living outside of Japan⁶². The Japanese migration to Brazil started at the beginning of the 1900s, when Japanese people were encouraged to go to Brazil to earn money as farmers. Brazil in fact exported coffee and needed workers for the plantations, since slavery was abolished in 1850 and European migration to work in Brazil started being discouraged at the beginning of the 1900s because of the working conditions and the extremely low wages. So, despite many difficulties, between 1906 and 1993 a total of 242,643 Japanese people migrated to Brazil⁶³, leading to the presence of a Japanese community in Brazil, which is likely the reason for the box dedicated to this country.

- “I love Flowers”: an assortment of lavender, rose water, jasmine, and orange tree blossom with honey.
- “I love Drinks” offers four different drink-inspired KitKat flavors: Orange Spritz, Mojito, Moscow Mule and Pina Colada.
- “I love Nuts” offers KitKat with different nuts in combination with either white or milk chocolate: there’s walnut with milk chocolate, Brazil nut with white chocolate, cashew nut with white chocolate and hazelnut with milk chocolate.
- “I love Dark” has four different degrees of chocolate darkness: 40%, 51%, 69% and 72%.
- “I love Ruby” simply offers eight Ruby flavored KitKats.

Aside from these “I love...” boxes, there are other special edition boxes, weighing 74 grams, which not only are special in flavor but also in appearance as they are more elaborated and colorful, and are all six-finger KitKats. The flavors include “Moleson”, a six-finger milk or white chocolate KitKat with Brazilian nuts and cranberry, “Unicorn”, with blueberry flavoring and with the six fingers being divided into three different colors, “Mermaid”, divided in three colors as well and with ananas and coconut taste, and “Alien”, which is very colorful and comes in mint flavor.

⁶² J. F. Normano “Japanese Emigration to Brazil”, *Pacific Affairs*, 7, no.1 (1934): 42-61. <https://doi.org/10.2307/2750689>.

⁶³ Governo do Estado de São Paulo. "Governo do Estado de São Paulo". December 31, 2016. <http://www.saopaulo.sp.gov.br/imigracaojaponesa/historia.php>.



Figure 27 - KitKat "Mermaid", "Moleson" and "Unicorn Soul" from the KitKat Chocolatory Brazil website.

Finally, there's also a big gifting box, with all the flavors mentioned above, plus passion fruit, raspberry, strawberry, and lemon, with a total of 24 flavors.

And this is it for the pre-made boxes. Then, there's also a possibility to create your own mix of KitKats minis, starting from choosing the type and shape of the box, then choosing from 17 different flavors (milk, mocha, coconut, super dark, raspberry, banana, white, pistachio, mint, hazelnuts, lemon, churros, guava, blackberry, cotton candy, passion fruit and pineapple) and finally engraving a message. There's also the possibility of creating a four-finger KitKat with a picture that the user can send to the site. Otherwise, if someone wants to gift something special but doesn't have a specific idea, they can also choose from pre-made designs: a heart design, or "for a great break" design, "Good vibes only" or "All you need is a break" slogan written on a four-finger white chocolate KitKat.

Aside from the flavors described, the Nestlé website, on the other hand, also gives the possibility to buy the products, which include four-finger in milk, white and dark chocolate, gold (which is caramelized white chocolate), strawberry, and lemon, shown in Figure 28⁶⁴. Brazil is also one of the countries offering KitKat Vegan. Other products which are apparently sold but only mentioned on the Nestlé website and not in the Chocolatory site are chunky, two-finger and twelve-finger KitKat.



Figure 28 - Four-finger KitKat Brazil from Nestlé Brazil "KitKat"

⁶⁴ Nestlé Brazil. "KitKat". <https://www.nestle.com.br/marcas/chocolates/kitkat>

Canada⁶⁵

Canada is another one of the few countries that has its own Chocolatory, which opened in 2019, after the success of the Chocolatory Pop-up in Toronto⁶⁶.

Canada's KitKat has its page on the Made with Nestlé website, where they sell KitKats specifically for this country with the possibility to choose between the French and English version of the website (which is possible for the Nestlé webpage as well). KitKat Canada has a Facebook, Instagram and Twitter page, whose links are in the first message that is possible to see right when the user opens the website. After that, we can see that there's a contest going on, where the winner can get a summer vacation worth 10 thousand Canadian dollars by buying a KitKat four-finger or a chunky bar or a King candy bar. The third most important communication that the website is trying to pass, as of November 2022, is their collaboration with Brent Burns, professional ice hockey player, who appears in the commercial for KitKat chunky. Both the website's style of communication and the commercials have a very friendly and humoristic tone, making sure to bring a smile to the user.

There's a vast variety of products being sold, including:

- Four-finger KitKats in the flavors of milk chocolate, 70% dark chocolate, white chocolate, gold, *matcha* green tea.
- Two-finger in the flavor of orange.
- Ten-finger in milk chocolate, cookie crumble, roasted almond, hazelnut and caramel.
- Chunky in classic milk chocolate, caramel, cookie dough and popcorn.
- Chunky minis contained in a pouch with the NHL's shirt on it, because KitKat has become NHL's chocolate.
- KitKat mini (short one-finger KitKats) and treat size (two-finger short KitKats).
- Senses: singular KitKats with filling under the chocolate cover, either in the flavor of hazelnut or caramel.
- Snax: a mix of KitKat bites (KitKats in the shape of little cubes), caramel popcorn, pretzels, and roasted almonds.
- Holiday themed: for Halloween, the classic four-finger KitKat changes packaging to a darker color representing a black cat, and there's also a Haunted House Halloween Kit, containing various



Figure 29 -
KitKat Senses
from KitKat
Canada



Figure 30 – The “Haunted
House Halloween Kit” from
KitKat Canada

⁶⁵ KitKat Canada. <https://www.madewithnestle.ca/kit-kat>.

⁶⁶ Nestlé Canada. “KITKAT Launches First Canadian Chocolatory Pop-Up in Toronto”. May 30, 2018. <https://www.corporate.nestle.ca/en/media/pressreleases/kitkat-chocolatory>.

KitKats bars, icing and “Scary Friends” (KitKats shaped as a vampire, witch, bat, mummy, and Frankenstein’s monster), to build a Halloween haunted house. For Christmas there are KitKat Festive Friends, the Santa shaped KitKat, and then two Christmas Advent calendars: one like the ones sold worldwide and one in collaboration with Hockey Holiday NHL. This year there were also a KitKat Chinese New Year box, containing *matcha* tea and gold KitKat bars, in a tin box, and a box of KitKat minis for Valentine’s Day. For Easter, KitKats become bunny shaped and chocolate easter eggs are available as well. There’s also an Egg Hunt Kit, containing one hollow chocolate bunny, 8 KitKat mini easter eggs and 8 bunny shaped KitKats.

All the products pages are very informative regarding the ingredients, the nutritional values and making it clear when a chocolate bar is made in a peanut-free environment (peanut allergy is in fact considered a “priority food allergen” by Health Canada⁶⁷). They also always highlight the fact that chocolate comes from a sustainable source, making sure to cite the Nestlé Cocoa Plan, and mention other socially relevant actions Nestlé has taken, such as supporting the Kids Help Phone. Another thing to notice is that there’s a Q&A section, which is used very actively by consumers leaving feedback on the products or asking questions.

The package of the original KitKat seems to give great importance to the fact that the chocolate KitKats are made come from a sustainable source, with the “100% sustainably sourced cocoa” sign taking up a third of the packaging, indicating the relative interest that the Canadian consumers have on the matter. In fact, the message in other countries is much smaller or sometimes not even in the front but in a corner in the back.

At the bottom of the site, there are videos advertising other Nestlé products, such as Bliss, Coffee Mate and “Nestlé Favorites”, advertising various Nestlé products for Christmas, not only KitKat.

Since Canada has a KitKat Chocolatory as well, there’s a page⁶⁸ dedicated to that, where you can see, and order pre-made special KitKat bars or make your own customized KitKat. The pre-made bars include four-finger KitKat bars in Canadian flavors (the blueberry *streusel*, for example) or seasonal or cocktail inspired bars, eight-finger “chocolatier’s choice”, like salted caramel bar or the “Berry Best”, decorated with dried berries and almonds.

⁶⁷ Food Allergy Canada. “Peanut”. <https://foodallergycanada.ca/allergies/peanut/>.

⁶⁸ KitKat Chocolatory Canada: <https://www.madewithnestle.ca/kitkat-chocolatory>.

*Mexico*⁶⁹

From the Nestlé KitKat page, the KitKats they seem to be selling are: four-finger in the flavors of milk chocolate, dark chocolate, white chocolate, gold, and lemon pie, and then the chunky KitKat.

As for the KitKat specific website, the landing page focusses on Nestlé's commitment to becoming carbon neutral by 2025. The site, as of December 2022, has a very festive look because it's Christmas season. From the list of products that they sell it seems that, aside from the classic milk, dark and white chocolate four-finger KitKats, they only have the *cappuccino* limited edition, the milk chocolate chunky and many different Christmas themed boxes. The flavor of the Christmas products is always milk chocolate, but they come in festive boxes, containing Santa shaped chocolate, that would make for a nice gift. The site also offers ideas for cakes and desserts to make using KitKat and other ingredients.

*USA*⁷⁰

KitKat in the US is a bit of an exception because it's not managed by Nestlé, but by Hershey, so the site belongs to them, and the chocolate bar is produced by them. Hershey has been making KitKat since 1970, under license from Nestlé. The site still bears resemblance with the other KitKat sites, with a red design and various recipes to use KitKats in but bears no Nestlé logo and also uses a different font, whereas all the other KitKat websites use the same font. There's a shape variety that is not available in Europe or in Africa, and it's the KitKat Thins, a bag that contains one-finger KitKats that can be broken in the middle, with two layers of wafer instead of three. There is also a big variety of sizes to choose from, from one-finger mini, to king size or BigKat.

Let's go in order and see all the types that are sold:

- Four-finger: it comes in the original flavor, milk chocolate, dark and white chocolate, blueberry muffin (limited edition), key lime pie, "breaking bones" (white cream KitKat bars) for Halloween, fruity cereal, and then there's a peculiarity, that is KitKat Duos, that mix two flavors which in this case are mocha-chocolate, strawberry-dark chocolate, and mint-dark chocolate combinations. They all come in a single or a 24 pack box. The King Size weighs double the normal size and can come in a single or four pack.



Figure 31 - Strawberry + Dark chocolate KitKat Duo from KitKat USA

⁶⁹ KitKat Mexico. <https://www.kitkat.com.mx/>.

⁷⁰ KitKat USA. <https://www.hersheyland.com/kit-kat>.

- BigKat: it's a one-finger much similar to the chunky, it has five layers of waffle, is larger than the four-finger bar and weighs as much. There's a King size that simply has two bars inside.
- Colliders: it's a "vanilla flavored dessert with KitKat crumbles" (KitKat USA) as from description on the box.
- Snack size: they're two-finger KitKats. For Halloween there are some special editions: the "Breaking Bones", made with white crème and the "Witch's Brew", which look green and are marshmallow flavored. All flavors, such as the duos, also come in this size.
- Miniature bars: they're one-finger short KitKats and offer many limited-edition flavors. As of November 2022, there are pumpkin-pie, lemon crisp, gingerbread cookie, and Valentine's raspberry crème.
- Assortments: a bag with a mix of flavors, for example Halloween themed bars or the classic flavors, either in miniature or in snack size.
- Minis are tinier than miniatures, they are one finger KitKats, and they are literally bite size. They come in different sized bags, 14, 8 or 7,6 ounces and the customer can choose between a bag containing wrapped or unwrapped minis.
- Thins: as described before, they are very thin bite sized KitKats and they come in milk chocolate and chocolate hazelnut.
- Milk chocolate but with special package for Valentine's Day, Christmas or fall season.
- Reese's and KitKat: a package that contains both KitKat and popular candy produced by Hershey, Reese's. The assortments come in miniature (35 oz) or snack size (45,38 oz) bags.



Figure 32 - KitKat Thins

So, the product has been made so that it can be adapted to the different needs for sizes and quantity of the customers. Since it's not a Nestlé site, there is no link to the Cocoa Plan. The main pages of the site are products, recipes, then there's a page about Hershey and their brands, and a map to find their locations.

Summary

What can be seen is that KitKat is particularly popular in Brazil, where special flavors are made in honor of the country's culture, cuisine, and history. The most variety can be found in Brazil and the United States, which also offers a big number of sizes, weight and number variety. The *cappuccino* limited edition seems to have been created specifically for Latin American countries.

4.6.3 Asia & Oceania

The countries in Nestlé's Asia & Oceania area are: Australia, Bangladesh, Hong Kong, India, Indonesia, Japan, Korea, Mainland China, Malaysia, New Zealand, Pakistan, Philippines, Singapore, Sri Lanka, Taiwan, Thailand and Vietnam, of which only Australia and Japan have a KitKat website.

*Australia*⁷¹

The Australian KitKat site shows not just a wide range of products, but also of collaborations with other brands and various possibilities to mix the different flavors, adapting to the consumers' tastes.

The Shopping part of the site includes the following sections:

- "Gifts", which include special editions and boxes: Santa shaped chocolate, the KitKat Chocolatory Drink Tumbler, various mixes of KitKats in two-finger or four-finger shape, the dark chocolate box, a set with all the chunky variations, the "KitKat cabin", made especially for Christmas, and other collections of different flavors in different sizes and prices.
- "Creations", which, as of October 2022, are two creations by the Australian Chocolatory: one is the "Swirling marble", and the other is the "Creamiest" milk chocolate bar. They both come in a single 16-finger bar.
- "Special Editions" with a great number of boxes available in different themes, all for 20 Australian dollars: one is themed as "classic", and contains milk, dark, ruby and salt caramel two-finger KitKat bars, one is "dessert" themed and contains a mix of 15 two-finger KitKats in the flavors of strawberry cheesecake, cherry brownie, *crème brulee*, *tiramisu* and cookies & cream, then a "fruit" themed box, with strawberry, raspberry, *yuzu* and passionfruit. Other boxes are special editions of strawberry cheesecake, hazelnut, and another collaboration, with Lotus Biscuit. As of October 2022, there are three other special editions:
 1. Espresso, cookies, and hazelnut
 2. Caramel, almond and cookie
 3. Reimagined Aussie Lamington
- The "Discovery Box", which contains KitKat classics, as the milk four-finger bar, and 5-6 new items such as bran new KitKat and KitKat Chocolatory creations and KitKats from around the world. The Discovery Box changes every month with new flavors.
- "Mix Your Break": since Australia has a KitKat Chocolatory, the website offers the clients the possibility to make their own KitKat box, from the chocolate type to a message to write on the box. The steps to follow are as written:

⁷¹ KitKat Australia. <https://www.kitkat.com.au/>

1. Selection of the size of the box: there's a choice in dimensions and consequently prices, from small, fitting 10 pieces for 14 Australian Dollars, to Giant Gift Box, fitting 250 pieces for 200 Australian Dollars.
2. Selection of the chocolate: there's a wide variety of two-finger minis and chunky. The chocolate types include the original milk, white and bitter chocolate, but also ruby, *matcha*, raspberry, strawberry, cassis, passionfruit, *yuzu*, pistachio, and salt caramel for the two-finger bars, and Lotus Biscoff, strawberry cheesecake, hazelnut, *tiramisu*, cookies & cream, *crème brûlée*, cherry brownie and gooey caramel for the chunky KitKats. Aside from the vast choice of flavors, the user can also decide to mix them, as long as the number fits the size of the chosen box.
3. Selection of a gift card in case it's needed: the user can choose between no card, or one of four options, two for specific occasions ("Break a leg" to wish someone good luck, and "Happy birthday" for someone's birthday), while the other two are simply complimentary.
4. Finally, the box will be added to the cart and paid for.

Aside from that, there is now a collaboration with Milo Hamper, another brand owned by Nestlé, which adds a Milo choc-malt to the classical KitKat wafer and milk chocolate combination. This new combo comes both in the shape of chunky and normal fingers in 45 or 165 grams.

Finally, the Australian site doesn't focus only on the tastes, flavors and qualities of the product, it also highlights strongly the humane side of the business, such as the activities done respecting the environment, the societal involvement in helping African children get their education, Nestlé's Cocoa Plan, which aims for "better farming, better lives and better cocoa", and a collaboration with "R U OK?", which created a KitKat box made to share with friends who might be having a difficult time and help them open up by starting a conversation.

*Japan*⁷²

Let's now see the Japanese website. On the landing page, as of November 2022, there's advertisement on the Santa shaped KitKat for Christmas, then other new KitKats, as the one made with whole grain and the one with cocoa nibs. There are links to the Chocolatory site, to the KitKat "Chocolabo", to a list of KitKat specific shops and to the Amazon link in case one wants to buy it online.

When visiting the "Products" page, the products are divided as follows:

⁷² KitKat Japan. <https://nestle.jp/brand/kit/>.

- “Regular KitKat”: they are mostly in the shape of KitKat minis, contained in the new paper package bag. The flavors are milk chocolate in a paper bag containing 13 minis, then there’s the “オトナの甘さ (*otona no amasa*)” series, meaning a “sweetness fit for an adult”, which indicates a flavor that’s not too sweet, and might have a hint of a bitter taste. This series has four flavors: dark chocolate (12 minis), strong *matcha* (12 minis), strawberry (11 minis), white chocolate with crushed *fiantine*, which is a “crispy, fine kind of biscuit made with crepe dough”⁷³ (11 minis). Aside from this series, other flavors, all in paper bags containing 11 minis, include KitKat made with whole wheat biscuits (the crispy texture is advertised on the package as well, with the onomatopoeia “*zaku*”) and white chocolate with salt. Then, there’s a special bag with high cocoa and cocoa nibs, always minis (the quantity is not specified). Another shape in the regular products is the one called “Little”, very similar to pops, they look like little cubes of KitKats, in the flavors of milk and dark chocolate, strawberry, whole wheat biscuit and cocoa with cocoa nibs. Finally, the chunky in the original flavor is available as well.
- “Limited editions”, that change periodically. As of November 2022, they include pudding flavor, which is recommended baked, then mint and cookies & cream, both recommended frozen. They all come in boxes containing 11 minis.
- “Gifts”: they are most likely aimed at travelers, be it Japanese or foreigners. There are 18 flavors, each representing a Japanese region (not necessarily a single prefecture). This is a way to promote the Japanese territory and its traditional products, while also involving some local confectionery producers and shops. There are many companies making products connected to specific regions, the so-called *gotouchi* products, of which we will talk with more detail in Part III. The regions represented in this “gifts” series are:
 - The Tochigi prefecture, represented by *tochiotome* strawberries combined with white chocolate.
 - Shinshuu, represented by its typical Shinshuu apples.
 - Tokai and Hokuriku have the *azuki* sandwich, which is a very popular dish.
 - Okinawa, together with Kyuushuu, is represented by sweet potato flavored KitKats.
 - Hokkaido, with Hokkaido *azuki* beans and strawberries combined with white chocolate.

⁷³ Desert drink & exotic. “KitKat white chocolate *fiantine* (Japan)”. <https://desert-drinks.com/products/kit-kat-white-chocolate-fiantine-japan#:~:text=This%20limited%20edition%20Kit%20Kat,crispy%2C%20finely%20baked%20crepe%20dough.>

- Hiroshima has KitKats in the flavor of *momiji manju*, very typical cakes of the zone. This flavor was also made thanks to a collaboration with *momiji manju* makers Takatsudo⁷⁴.

- Kyoto's KitKats come in two flavors, both belonging in the tea category: one is *uji-matcha*, the other is *houjicha*, roasted green tea, with white chocolate, both made in collaboration with Itoh Kyuemon⁷⁵, a Japanese tea shop in Kyoto specialized in *uji* tea.



Figure 33 - KitKat "Gifts" representing different Japanese regions, from KitKat Japan's Instagram [post](#)

- Yokohama has strawberry cheesecake as its flavor.
- Shizuoka and the Kanto area are represented by Japanese horseradish *wasabi*, a special flavor created through a collaboration with Tamaruya Honten⁷⁶, a shop specialized in making *wasabi* preservers, situated in Shizuoka.
- Tokyo has Tokyo Island lemons (it used to be Rhum raisins flavored chocolate earlier this year).
- Kyuushuu has *amaou* strawberries.
- For Japan in general, one can choose from two boxes containing 8 minis: strawberry cheesecake, in a box in the shape of Mount Fuji, and Japanese *sake* KitKats, in a box that shows a bottle of *sake*. The Japanese *sake* KitKat is part of a series of Japanese liquor-themed KitKats aimed at spreading knowledge through the world about Japanese liquors. This project was produced by former professional footballer Hidetoshi Nakata and made in collaboration with *sake* producer company Masudashuzo. It's interesting to note that all the other boxes for the flavors listed above are made with similar criteria, same shape, and size, with different colors and a

⁷⁴ Takatsudo website. <https://takatsudo.com/index.html>.

⁷⁵ Itoh Kyuemon website. <https://www.itohkyuemon.co.jp/corporate/>.

⁷⁶ Tamaruya Honten website. <http://www.tamaruya.co.jp/eng/about.html>.

simple representation of the flavor they have, while these boxes representing Japan are different, with a shape that is more representative of a “Japanese” atmosphere.

- Tokyo is also represented by Tokyo Banana KitKats (6 minis), made in collaboration with the actual Tokyo Banana makers, in fact, both candies share the “見つけたっ (*miitsuketa*)” slogan, meaning “I found you!” reminiscing on the childhood games people used to play as children, such as hide and seek and catch.
 - Finally, Yamanashi has a box in the flavor of *mochi*, which is often eaten with black sugar and *kinako*, roasted soybean flour. This as well is a product of a collaboration, this time with *mochi* maker Kikyouya⁷⁷.
- The “KitKat Chocolatory”⁷⁸ section offers single servings of special flavors made in the Chocolatory. Since they are provided in a single packet of one KitKat mini, the package is



very minimalistic, picturing an artistic smudge of chocolate or little fruits. There are twelve flavors available at the moment: bitter chocolate, made with 3 types of high-quality chocolate coming from Ghana, Madagascar and the Dominican Republic, couverture milk chocolate, white chocolate, ruby chocolate, then the flavors of *matcha*, strawberry, blueberry, raspberry, passion fruit, *yuzu*, pistachio and salt caramel. All these flavors are offered

in single packets of one mini because

they are part of the “Pick to mix” service, where a customer can choose freely the flavors they want and put them together in a package of ten minis. “Pick to mix” aside, there are four flavors, bitter, milk, white and ruby chocolate, of single sticks offered in a box containing a single one-finger KitKat, in a series called “Sublime”. All in all, the image the Chocolatory seems to want to project is that of high quality in little quantity, with a lot of attention to design and presentation.

⁷⁷ Kikyouya website. <http://kikyouya.co.jp/>.

⁷⁸ KitKat Chocolatory Japan. <https://nestle.jp/brand/kit/chocolatory/>.

The Chocolatory also exists in the shape of online shops, where customers can order their personalized box.

The KitKat website also links to the Chocolabo⁷⁹, which is a special website made for people who want to create a special gift with KitKat, using pictures of their own. The customer can choose between three formats: 20 individual KitKat minis with personalized pictures, 10 boxes with the “original” design, where one can put their pictures, or 10 boxes with “otona no amasa” design, which has a darker color palette. Once you chose the format, you can choose the frame, upload your picture, make adjustments, add a message, chose different colors and add stickers. Finally, since there would be 10 boxes, one can make up to five different designs. The procedure is pretty much the same for the single packets, where one can create up to 4 four different designs.



Figure 35 - Still from the Chocolabo website explaining the creation of a personalized product

Summary

Very similarly to Brazil, KitKat shows a lot more flexibility and creativity in Japan and Australia, both countries with a KitKat Chocolatory, where customers can make their own boxes, which can be used as gifts, with customized pictures or messages and flavors.

The other Asian countries only have a KitKat page on the Nestlé website, and they all have at least a four-finger KitKat and some other shapes, such as two-finger or bites. For the Oceania region, New Zealand simply links to Australia’s website as its representative.

4.6.4 Europe

Nestlé Europe includes Austria, Belgium, Bosnia & Herzegovina, Bulgaria, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Macedonia, Malta, Moldova, Netherlands, Norway, Poland, Portugal, Romania, Russia, Serbia,

⁷⁹ KitKat Japan, Chocolab.
https://www.chocollabo.com/?fd_bridge_id=eXJlVWwvLzVkYmpaUjZHYVZpNkVKUT09LS1XVCtnSWJ5dm1ieGpTMjlTNTIyenZRPT0%3D--92a74d6df7bef997153840e2a207692a9a622b6f&_ga=2.58797610.662446300.1675840885-202778395.1668601799.

Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, UK and Ukraine, but only the UK, Germany, Italy and Netherlands have a KitKat specific website, so I will be considering them.

UK and Ireland⁸⁰

As of October 2022, the UK site has a variety of Christmas themed KitKats, all in milk chocolate flavor and in the shape of a little Santa Claus. There's an Advent Calendar, and various packs of KitKat Santas, from a single portion, weighing 29 grams, to a mini 55-gram pouch, to a 145 gram multipack, to a 220 gram large pouch.

Aside from that, there's a variety of shapes and flavors in the UK KitKats as well:

- Classic four-finger in milk, dark and orange chocolate flavors, and a vegan version as well.
- Two-finger, as long as the 4 finger, in the flavors of milk, dark and white chocolate, then honeycomb, orange and dark mint. The peculiarity of the 2 finger is that it comes in 80% recycled plastic packaging.
- KitKat Bites, shown in Figure 36, available in milk chocolate and caramel flavors.
- Chunky, that comes in several flavors as well: milk chocolate, caramel, Lotus Biscoff, peanut butter and salted caramel popcorn.



Figure 36 - KitKat Bites from KitKat UK

The UK site advertises the involvement of KitKat and Nestlé in the creation of a business that is more eco-friendly and respects the environment.

Germany⁸¹

Like most of the KitKat websites, the first thing that comes out is their commitment to reach carbon neutrality, and then advertisement for some products such as the bag of mixed minis and the salted caramel pop-corn chunky. Just like the other sites, there's a part where they share some Instagram posts and video commercials.



Figure 37 - KitKat mini mix from KitKat Germany

The products are:

- Four-finger in vegan, milk chocolate and white chocolate flavor.
- Chunky in milk and white chocolate, caramel, peanut butter, salted caramel popcorn.
- Milk chocolate Singles.
- Mini mix (milk, white, hazelnut, salted caramel and peanut butter), and milk chocolate mini.

⁸⁰ KitKat UK. <https://www.kitkat.co.uk/>.

⁸¹ KitKat Germany. <https://www.kitkat.de/>.

- Christmas themed KitKat: Santa, Festive Friends, and the Advent Calendar.

*Italy*⁸²

Italian KitKats have their own website as well, with the same color scheme and similar contents as the others. The first thing that the consumer can see when they land on the page is the promotion of a collaboration with Amazon Prime to win a prize connected to the Rings of Power TV series, then the promotion of the fact that Nestlé KitKat is trying to achieve the goal of being carbon neutral by 2025. The classic milk chocolate KitKat advertises the fact that the cocoa to produce the chocolate bar was sustainably sourced.

There isn't a big variety of flavors: just milk, white and dark chocolate. As for shapes, four-finger, two-finger, mini and chunky seem to be available. For Halloween there was a special Halloween-themed KitKat mini bag, while for Christmas there are a Christmas Advent Calendar, the Santa shaped snack and KitKat Festive Friends, with chocolate shaped in various Christmas characters, such as snowmen and ginger cookies.

Finally, throughout the site one can also see a variety of commercial videos, from their YouTube page, recipes, and Instagram posts.



Figure 38 - KitKat Advent Calendar from KitKat Italy



Figure 39 - KitKat Vegan from KitKat Netherlands

*Netherlands*⁸³

The Netherlands KitKat website is advertising KitKat Vegan the most. As the other websites, it has a product carousel and a part dedicated to recipes using KitKat. There's also a section dedicated to the Nestlé Cocoa Plan. The variety of products is very similar to the German products, with four-finger KitKat in the classic flavors and Vegan, chunky in a variety of flavors, such as caramel and salted caramel popcorn, and the bag with a mix of minis.

Summary

Most European countries as well have a KitKat page on the Nestlé website rather than a KitKat page and the information that they all provide includes a brief description of the product and a link to the Nestlé Cocoa Plan, sometimes with interesting facts about the chocolate bar or with a more specific list of available products. The flavors that are available in all countries are the four-finger bar in milk,

⁸² KitKat Italy. <https://www.kitkat.it/>.

⁸³ KitKat Netherlands. <https://www.nestle-chocolade.nl/kitkat>.

white and dark chocolate. Chunky and mini, where available, seem to be the shape varieties made with more different flavors.

4.6.5 Considerations

It looks like in most cases the Nestlé site is used instead of creating a specific KitKat website, but for each area there's at least one country that has a KitKat specific website. As for the contents of the Nestlé website KitKat pages, the minimum level of information provided is the description of the product and a mention of and link to the Nestlé Cocoa Plan, which seems to be as important as the product itself.

As for the KitKat websites, they all share the same color, which is red, have a first part of the site showing anything they want to advertise at the moment, be it the carbon neutrality commitment, a special flavor or a contest in collaboration with other companies. After that, there's usually a list of products available, then the Facebook or Instagram posts, video commercials from YouTube and finally some recipes to use KitKat. The Japanese website is the only one that doesn't talk much about Nestlé's environmental commitment, or about the fact that KitKat is made with chocolate from sustainable sources or about the Cocoa Plan. For that kind of information, the user should visit the Nestlé Japan website which talks about Nestlé's social and environmental commitment and how it has been translated into action in Japan, as seen in section 3.4. On the other hand, the Japanese KitKat website is also the only one that provides the possibility of taking a virtual tour inside the KitKat factory, which is something that can be done both through the site and through the official YouTube channel.

The flavors vary across countries, but what is common to all is the original milk chocolate four-finger, with the only exception of Japan where KitKat mini are the indisputable winners. Many of the Latin American countries have the limited-edition *cappuccino* while European countries generally lack special or limited editions. The "Mini moments" bag with the five different flavors, seems to be sold in some countries all around the world, from Arabia to Bangladesh, Austria and Germany, for example. It's interesting to note that the colors used for the flavors are approximately the same in every country: hazelnut is always associated with green, and cookies and crem with light blue, so it's easy to guess the flavor by looking at the colors. The one that has more differences between countries is white chocolate, because it can go from yellow to white to eggshell white.

As for the shape, the four-finger is almost ubiquitous, aside from Japan where the two-finger minis are the most abundant, while for the rest it changes from country to country, with sizes as well adapting to the tastes and needs of the consumers. Most of the Western and Asian countries have the Easter and Christmas themed products, while Arabia, a mostly Muslim country, has a Ramadan

special box. All these differences show that the product has been somewhat revised in every country it is being sold, appording any modification that seems necessary.

What can be deduced from these differences is that Nestlé used indeed a strategy of glocalization, where the same product is sold globally but with modifications and marketing decisions that depend on the local culture and peculiarities, to make their products appealing by adapting them to the needs and culture of the local environment. It's thus clear that the average European consumer is not that attracted to the variety of flavors, but respects more the traditions of festivities, such as Easter and Christmas. The Australian consumers seem to appreciate the possibility to make their own personalized version of a gift box and is very attentive to modern problems, such as the environment and social issues, and Japanese consumers seem to prefer special limited editions that reflect the Japanese uniqueness and the charms of different regions of Japan, which can be bought as gifts when they go on a trip.

I would say that another thing that has been ascertained is Japanese KitKat's popularity: countries such as Vietnam directly import Japanese KitKats, and the *matcha* KitKat, which was created in Japan, is sold outside of the country as well, reaching as far as Canada.

5. KitKat's marketing mix in Japan: a case study

With all the information gathered until now on the kinds of marketing strategies that an international firm can take, I would like to take into consideration the strategy that KitKat adopted in Japan, to study it as an example of a successful glocalization strategy, since the chocolate bar found great success in Japan.

The marketing mix is the strategy plan through which a company plans to sell their product. It's often referred to as the 4 Ps: product, promotion, placement, and price. I think it's important to see what kind of marketing mix Nestlé Japan decided to adopt for the Japanese KitKat to better understand how they adapted to the local market and what cultural aspects influenced their decision to adopt certain modifications. So, in the next sections we will be analyzing the product, thus the Japanese varieties and flavors, especially the limited editions, we will see the evolution of KitKat commercials, trying to connect the commercials to the history of Nestlé and KitKat in Japan, and we will also see how they are distributed and priced.

5.1 Product

5.1.1 Shape variety

As seen with more detail in the section about the KitKats sold in Japan, the shape variety that is predominant in Japan is the two-finger KitKat mini, in the flavors of milk chocolate, the “*otona no amasa*” series (with flavors of strawberry, dark chocolate and *matcha*), the white chocolate and *fiantine*, plus the special editions of the period, the “gifts” dedicated to different Japanese regions,



Figure 40 - KitKat Littles, from KitKat Japan Instagram [post](#)

and the high-level flavors created in the Chocolatory. There seem to be no four-finger KitKat, not even the original, so there seems to be a preference for smaller products.

The other shape being sold is the one called “Littles” with little cubes in bags, in the flavors of strawberry or white chocolate and *fiantine*.

Each box or bag of KitKat, aside from the littles, contains single wrapped minis, which makes it easier to share. On every KitKat wrapping, there’s always space to write a short message, in case the chocolate bar is a gift for someone.

5.1.2 Flavor variety and limited editions

As seen from the history of Nestlé, in the year 2000 Nestlé bought Fujiya’s shares of KitKat and has been managing Japanese KitKat on its own. From that year, the number of flavors and special editions started to increase, so we can say that the strategy changed substantially after Nestlé took over: the product was adapted more to the tastes of the Japanese consumers.

To this day there are more than 300 flavors that have been sold in Japan. There are mainly two ways in which the Japanese KitKat special edition flavors can be divided:

1. Time: the first thing one thinks of when they hear the words “limited edition” is a special edition that is bound to end after a short time. Japanese people are very receptive to seasonal editions of foods and will expect certain flavors in certain times of the year. KitKat hasn’t failed in adhering to that schedule, it has indeed produced special seasonal flavors every year. The flavors that are considered a must are surely cherry blossoms every spring, chestnuts, or sweet potato in the fall for example. These limited editions will last a few



Figure 41 - Strawberry Gateau Chocolat KitKat from Instagram [post](#)

weeks and then they'll be gone at a very quick pace. The flavors are very imaginative, there has been the Japanese *sakè* series, where KitKats with flavors of different Japanese liquors were made, there has been a KitKat flavor called "*ikinari dango*", that was made so that it could be baked, while for some other KitKat flavors, such as mint chocolate, there's a suggestion of trying them frozen. As of January 14th, 2023, the latest special flavor is Strawberry Gateau Chocolat, promoted on their Instagram page with a [post](#) on December 22, but there's already a new flavor that will be launched on the 16th, teased in a post from January 13th.

2. Space: Japan is divided into 47 prefectures and each of them has special and traditional products. It's a well-established praxis for Japanese brands to make special editions that are connected to those specific prefectures and products, and KitKat is no exception. As already observed in the subsection about Japanese KitKat, there's a specific "*Omiyage*" section dedicated to the so-called *gotouchi* products, where different regions have their specific KitKat flavors connected to typical products of the place, some of which were made in collaboration with local shops specialized in that product. The *gotouchi* KitKat can be a great idea for a souvenir from people who went on a trip in a specific prefecture, hence the name of the category "*omiyage*" which translates to "gift".

5.1.3 Packaging

The packaging of the product always plays a fundamental role: it is, after all, the first thing a potential consumer sees, their first contact with the product, so it must be appealing and fit the customers' tastes.

Figure 42 displays the original KitKat package that was used from 1935 to 1937. The chocolate bar has come a long way from that time, but the color that represents the brand is always red, as seen in all the KitKat websites, the package of the original flavor is still red and, even if the package for special flavors might be a different color, the logo is always red.



Figure 42 - Original KitKat package from Nestlé "KitKat".

In this section, I would like to see how KitKat Japan adapted to the market in representing Japan through the package and by also stating their commitment to environmental issues.

Expressing Japan through the package

According to Suarez, Hugo, and Paris (2020)⁸⁴, Japanese people in particular give a lot of importance to the way a product is packed: the packaging itself is in fact part of the experience and expresses the care that is put into the production and management itself of the product.

A package that shows in some way the characteristics of the Japanese culture, also, seems to be appreciated by Japanese people. On this front, not all the KitKat packages show a uniquely Japanese image, but some of them do. The advantage of these Japanese packages is that not only it can be appreciated by local consumers, but it also is easier to be chosen as a souvenir from foreign tourists who are looking for something they can only buy in Japan: as will be discussed in more depth in the next chapter, the target of Japanese KitKat is not only the local



Figure 43 - KitKat Tokyo Banana package from [Grapee](#)

consumers, but also foreigners that come to visit Japan, because Japan's population is facing the problem of a decreasing natality rate and the increase of the average age of the population, that inevitably means that in the future the population will decrease, and so will the number of potential clients.



Figure 44 - KitKat strawberry cheesecake package, from KitKat Japan

Figures 43 and 44 show some examples of the packages that express “Japaneseness”. They both are in the shape of Mount Fuji, which is a very important part of the Japanese landscape and is very well known outside of Japan. Figure 43 shows KitKat in the flavor of Tokyo Banana, which is a typical sweet made in Tokyo, so it's a special edition representing Tokyo as well. Both the Tokyo Banana KitKat and the strawberry cheesecake KitKat are, or have been, in the section “*omiyage*”, meant to be presents or souvenirs, representing Japan in the specific. So, it can be thought that they were made in this shape to attract tourists wishing to

bring something that says, “I'm from Japan”.

There was another project specifically aimed at foreigners, which was meant to spread some new knowledge about Japanese liquors, such as *sakè*, *umeshu*, represented in Figures 45 and 46, and *yuzushu*. Special KitKats were produced in this flavor, and



Figure 45 - Umeshu KitKat, from [Jw webmagazine](#)



Figure 46 - Japanese sakè KitKat from KitKat Japan

⁸⁴ Suarez, Lina, Hugo, Nichole, and Paris, Cody M. “Understanding Japanese consumer behaviour and cultural relevance of gift giving”, *African Journal of Hospitality, Tourism and Leisure*, 9, no.1 (2020).

videos – in Japanese with English subtitles – were posted on YouTube, to share the process of creation of this product, from the idea to the completion of the chocolate bar. The playlist that includes these videos is available on the [Official Nestlé Japan YouTube channel](#).

Other packages also reflect the fact that the product has been adapted to the Japanese culture and what is appreciated by the Japanese population in general. For example, the cherry blossom season is very famous in Japan and in the world. In Japan, it’s a very important social event, in which people gather to admire the beauty of the flowers. Every year there are thus cherry blossom themed special KitKats. The first special KitKat packaging, made in 2000, was in fact cherry-blossom inspired, in theme with the period of entrance exams and *hanami*.

Figure 47 shows a New Year’s special packaging that represents cherry blossoms flying away in a red and white package, which refers to the musical event that is broadcasted every year at the end of the year, the “紅白歌合戦 (*Kouhaku uta gassen*)” a musical competition in which two teams, one red and one white, compete with their songs. The KitKats themselves are not a special flavor, they’re the classic white and milk chocolate, but they’re presented in this peculiar packaging, that mixes them both, because of the event of New Year.



Figure 47 - End of the year “Red and White” themed KitKat from [Amazon](#)

The paper packaging



Figure 48 -New KitKat in paper package, from [Stylise](#)

The raising concern for the climatic change and global warming has made it impossible for any business to ignore it and not address it. We’ve seen Nestlé’s values in section 3.2, and one of the most important values is the respect for the environment. We’ve also seen that all values are shared throughout the subsidiaries of Nestlé in every country, but that does not mean that they all do it the same

way: not only the product but also the strategies and management have been adapted to the local market. In Japan, a new packaging made entirely of paper has been launched in 2019 and, at the moment, this package seems to be a peculiarity of the Japanese KitKats, while other countries, such as the UK, might have a plastic packaging but they make sure to state that it is recycled in a certain

percentage or that it will be recycled. What all packages have in common in every country is the mention of the Cocoa Plan.

The strategy to promote this change involved showing that the paper packaging can be used to make *origami*, draw, or write special messages. *Origami* is a traditional Japanese activity, so this is also a good way to connect to the “Japaneseness” of the packaging, that might also make it more appealing to the consumers. As we will see in the next paragraph, one of the more recent commercials shows Noppo, a famous television personality that used to be in TV programs for children, teaching how to make *origami* with the KitKat packaging.

The use of the paper packaging to write a message is advertised through the portrayal of another important part of Japanese culture, which is the official love confession “*kokuhaku*”, where someone confesses their feeling to the person they like, generally in the context of middle and high school. Commercials advertising this paper package show that it can be used to deliver a person’s feelings.

This way, Japanese KitKat has blended in Nestlé’s global value of protecting the environment by reducing the use of plastic, and a way to make this package have a Japanese image by associating it with the very Japanese activity of *origami*.

5.1.4 Considerations

So, from these observations it’s clear that the product has been adapted to the country, the habits of the customers and the social context, with flavors reflecting the Japanese propensity for seasonal editions and for editions that represent different parts of the country, as a part of the *gotouchi* phenomenon, and of the fact that a certain Japaneseness is always appreciated both by locals and by foreigners.

The fact that gift-giving is a part of Japanese culture is shown by the fact that there is a special “gift” section thought for people who want to buy a present for people when they go on a trip to a specific location, and by the fact that it’s possible to write a special message on the wrapping of single minis, as it can be used to show gratitude or give encouragement to someone.

The commitment of the company towards the environment, which is a value that is shared in every country the company operates, is also represented both by the fact that the packaging is made of paper and by the mention of the Cocoa Plan on the back of the package.

5.2 Promotion: TV commercials and social media

Promotion is another “P” of the marketing strategy, it’s in fact impossible to think of a business that doesn’t have social media or doesn’t advertise their products in some way.

In this section I will analyze the KitKat commercials in Japan, starting from the 70s, when KitKat just began being sold in Japan, finishing to today's commercials. After that, we will also see what social media platforms KitKat has and how it uses each one of them to communicate with their followers.

5.2.1 The history of KitKat commercials in Japan

I am now considering the evolution of Japanese commercials used to advertise KitKats, while trying to make connections with the actual story of Rowntree Mackintosh first and then Nestlé, to see if management differences can be perceived through the way they decided to advertise the product.

Many videos of Japanese KitKat commercials can be found on YouTube, and I have gathered the ones I found in a YouTube [playlist](#).

I will not be talking about all of them, but I have selected a few representatives for each decade from the 70s to today.

The Seventies

As explained in section 4.1, KitKat first entered Japan in 1973. I have found two examples for this decade and they both show the original commercial, with English characters speaking English. There are Japanese subtitles and a message in Japanese, with the essential information on the product, such as what it is and its price.

Figure 49 shows two moments from a commercial⁸⁵ where extremely popular Scottish pop rock



Figure 49 - KitKat commercial with Bay City Rollers, from YouTube

band, Bay City Rollers, is singing a song made especially for KitKat, with a KitKat poster in the background, followed by a close-up of the product itself.

It wouldn't be possible to tell it's a commercial that was aired in Japan if it wasn't for the Japanese description of the chocolate bar,

saying “チョコとウェハーの名コンビ” (*choco to ueha no meicombi*), “a great combination of

⁸⁵ YouTube. “KitKat CM 映像”. December 22, 2009. https://www.youtube.com/watch?v=BEKg_YfpUqw&ab_channel=TetsuroNakayama.

chocolate and wafer”, a very short and effective description, since, at the time, people most likely didn’t know what a KitKat consisted of.

The use of the original commercials instead of the creation of new ones is probably due to the fact that commercials are expensive, and, with KitKat being a new product in Japan, it would have been a great investment to produce a Japanese commercial in Japan without even having much information on how it would have been received from the Japanese audience and possible consumers. As we’ve seen, when companies enter a new market, they first have a great perception of risk, so they are less willing to invest a great amount of money. After they gain more knowledge on the market’s characteristics, they feel more comfortable making decisions. At this time, the company had just entered Japan, so it can be said that it was testing the waters.

The Eighties

We can see a definite change through the 80s: in the year 1980, the commercial used was still an original English commercial, even though the song used as background was translated to a Japanese version. By the second half of the decade, however, a new series of commercials was introduced, with actual Japanese characters in the video: young Rie Miyazawa, who later became a very famous actress, is the first of the many to appear in a KitKat commercial.

In the commercial⁸⁶ shown in Figure 50, though there are Japanese characters, the setting is always England: in this series of commercials, the protagonists are young girls travelling to England, where even the Royal Guards enjoy a break with a KitKat. The image of KitKat being broken is introduced in every video and, at the end, there’s an image of the product with the same simple description we’ve seen earlier. A song about KitKat has been



Figure 50 - Commercial from 1985 set in England, with Rie Miyazawa as protagonist, from YouTube

⁸⁶ YouTube. “ 【 CM 】 宮沢りえ キットカット ”. May 6, 2007. https://www.youtube.com/watch?v=1O7zDNNrijw&ab_channel=KSS1558

specifically made for the soundtrack, which simply says “ブレイクするなら... (*Bureiku suru nara...*)” which means “If you’re going to have a break...” interrupted by the scene where the KitKat is snapped, and then it continues by repeating “KitKat break” multiple times. So, this time, even though the slogan is “Have a break, have a KitKat”, the message that appears on screen is “Have a break, KitKat break”, to match the song in the background.

I think it’s important to note the fact that, even though the protagonists are Japanese, the setting is still very clearly foreign. At this point, I would like to make a digression on the use of foreigners in Japanese commercials: as Ólafsson (2014) explains, in the Japanese perspective, the fact that a product is being imported from abroad to a place as far away as Japan must mean that the product is very successful abroad, so, when selling a foreign product, it would probably be beneficial to stress its popularity abroad. I believe that setting the commercial in England might have been a way to use this perspective to their advantage. Also, to make this impression of “foreignness” even stronger, the commercial ends with someone, supposedly one of the Guards, speaking Japanese with a foreign accent, instead of having a Japanese actress say the punchline in perfect Japanese.

The Nineties



In 1988 KitKat became Nestlé’s property. The setting of the commercial⁸⁷ shown in Figure 51, from 1992, is now completely Japanese, as well as all the characters. In the commercial, two office ladies decide to take a break, and, while one is getting coffee, the other completes her colleague’s work. After eating a KitKat, the

Figure 51 - Commercial from 1992 with Sae Isshiki as protagonist, from YouTube

⁸⁷⁸⁷ YouTube. “【懐かしいCM】キットカット 一色紗英”. August 5, 2019. https://www.youtube.com/watch?v=GIUn7E91B-Q&ab_channel=Mashibusica.

colleague sees that her work has been finished so they decide to take another break. The scene of breaking the KitKat bar with a snapping sound is still used, and now there's also a scene where a single finger of the bar is snapped in half, to show what the bar looks like on the inside. This time the slogan is "Have a break, have a KitKat".

In this series of commercials, the protagonist is often an office lady in her free time either at work or outside, for example trying paragliding or preparing for a meeting. One thing I think is important is the predominance of the presence of the so called OLs, office ladies. After the Second World War, the rise of the OLs began, and by the 1980s this was the most common job for Japanese women, making roughly one-third of the female work force⁸⁸, which also brought to the implementation in 1986 of the Equal Employment Opportunity Law in an attempt to get closer to equal employment opportunities for men and women.⁸⁹

The fact that OLs are often the protagonists of these commercials shows the attention that Nestlé paid to the social background of Japan, which is fundamental to create an effective marketing strategy and decide how to communicate with the potential customers to create a good bond with them. We will see that this is a kind of commercial called soft selling, used frequently in Japan, that uses stories to which the viewers can relate in order to establish a connection with them.

The Two Thousands

In the 2000s, KitKat was well established, and Nestlé was confident enough to go independent and detach itself from their cooperation with Fujiya. There is a considerable change: the number of flavors increased significantly in a short span of time, and the "*kitto katsu*" strategy started being implemented, leading to a lot of commercials with the theme of entrance exams being introduced. As seen in section 4.1, in fact, at the beginning of the 2000s, people naturally made the connection between the Japanese pronunciation of KitKat with the dialect version of the phrase "きつと勝つ", "*Kitto katsu*", which would mean "I (or you, we) will surely win", so Nestlé decided to effectively use this assonance in their strategy as well, spreading the message that KitKat can be bought and gifted to encourage people as well.

At this point, the commercials seem to have at least two different themes:

⁸⁸ Cherry Kittredge. *Womansword: What Japanese words say about women*. Stone Bridge Press, 2016.

⁸⁹ Miyako Inoue. *Vicarious language: Gender and linguistic modernity in Japan*, 11. Oakland: University of California Press, 2006.

- Romance: the commercial⁹⁰ Figure 52 is taken from shows a girl nervously waiting for her Valentine’s date. The box that is being advertised is a special KitKat box, with chocolate made in collaboration with “Le Pâtissier Takagi” which is a pâtissier specialized in foreign cakes and pastries. The background song is by Kaela Kimura, who is a pop rock singer, model, and television presenter. The slogan is not said but it’s



Figure 52 - Takami Mizuki in 2006 Valentine's special commercial, from YouTube

written at the end, together with the link to the website. We can hear the use of the word “きつと” which phonetically sounds like the Japanese pronunciation of “Kit” in KitKat, and has a meaning in Japanese, which is “surely”. So, there’s a play of words that is used to connect the brand with a message of hope and encouragement, in this case hope of having reciprocated feelings.

- Study, entrance exams: entrance exams are a very important part of the students’ lives and in Japanese culture in general, which is something that Nestlé has clearly understood, and which has thus been given a lot of space. In the commercial⁹¹ in Figure 53, a girl, always interpreted by Mizuki Takami, is going to take an entrance exam, and finds a box of KitKats that her mother put in her bag to wish her good luck on the exam. The use of the word “*kitto*” is here as well, expressing



Figure 53 - Mizuki Takami in 2006 entrance exam commercial from YouTube

the hope of passing the exam. The phrase used, supposedly said by the mother encouraging her daughter, is “きつと桜は咲くよ (*Kitto sakura wa saku-yo*)”, which literally means “cherry blossoms will certainly bloom”. In this context this phrase refers to the fact that when highschoolers go see the results of the entrance exams for universities, if they passed the exam, they say that cherry blossoms have bloomed – the results of the exams, in fact, usually come when cherry blossoms are giving spectacle – instead of simply saying they were accepted by

⁹⁰ YouTube. “KitKat Renai 2006 CM”. March 10, 2006. https://www.youtube.com/watch?v=oOCN1FJD1EE&ab_channel=akichau.

⁹¹ YouTube. “KitKat Juken 2006 CM”. March 10, 2006. https://www.youtube.com/watch?v=gSJs_thmGCQ&ab_channel=akichau.

the university they applied for. The song used as a background is always sung by Kaela Kimura.

These are clear examples of soft sell commercials, which use situations that are relatable to the viewers and insert the product seamlessly into the context. The creation of relatable stories, the use of the assonance with the phrase “*kitto katsu*” and the portrayal of moments in life that are considered very important in Japan, all show that Nestlé was paying attention to what was being said by their consumers about their product, and that they had a deep understanding of the Japanese culture and of people’s everyday life.

The first decade of the Two Thousands

The testimonial for the brand from 2010 to 2012 was Meisa Kuroki, Japanese actress, singer, and model, who, in Figure 54, is advertising, in a very upbeat commercial⁹², two different KitKat flavors, available in a new format: original and dark chocolate, in the shape of KitKat minis in a package of three. “The third one is for you” is what she says, pointing out the fact that there are two versions of the chocolate bar, but also highlighting the fact that this format makes it easy to share it with someone else.

The slogan is always the same and it’s written at the end together with the image of the packaged product and the name of Nestlé’s website.

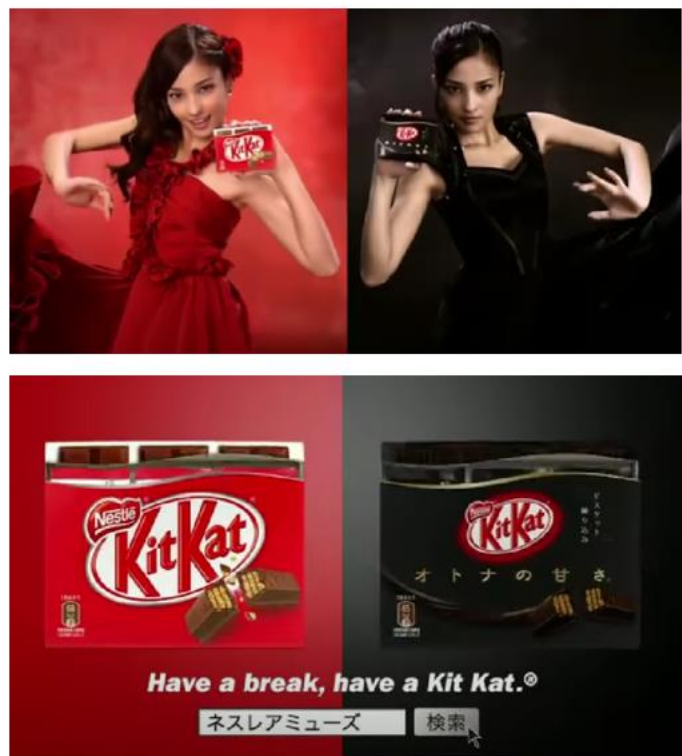


Figure 54 - Meisa Kuroki in commercial for black and red KitKats, from YouTube

While the commercials of the 2000s still focused on the emotional story more than the flavor variety, the commercial I’m taking into consideration has quick music and dance, giving it a Spanish, so foreign once again, appeal. It’s probably no coincidence that the singer chosen isn’t completely Japanese but a quarter Brazilian, giving an exotic touch to her image. This was the launch of the line that still survives today: “*Otona no amasa*”, “The sweetness of adults”, of which we have already talked in previous sections.

⁹² YouTube. “黒木メイサ CM- キットカット (One More Drama - 黒木メイサ)”. January 5, 2013. https://www.youtube.com/watch?v=XNKw9VrMfCs&ab_channel=MeisaSpain

Parallel to that, the workplace and entrance exams storylines haven't been abandoned. In fact, after entering the 2010s, the testimonials have been separated into the ones who will do commercials with workplace or flavor themes and people who will represent the entrance exams period. The number of testimonials grew a lot in the 2010s compared to the decade before that: it was three people, doing both romantic and scholastic themes in the 2000s, while there has been a total of seven brand ambassadors in the 2010s. (We will see the list of celebrities in these commercials with more detail in the next subsection).

2013 was the 40th anniversary of KitKat in Japan and KitKat made a special commercial for the occasion, with pop singer Ayaka singing the main song for the commercial⁹³. The commercial was about thanking the customers for the years spent together, so the song's theme was "Arigatou", "Thank you", and featured children using KitKats to deliver their feelings of gratitude towards their teachers. This commercial also showed the cultural tradition of giving gifts to someone who took care of you. The KitKat wrapping, in fact, has a little section to write a short personal message in case there's the need.



Figure 55 - Noppo explains how to make origami with the new KitKat package, from YouTube

Going on to the end of the 2010s, an important change occurred in 2019: the package became a paper package, so commercials had to highlight this change. The person chosen for this task was Takami Noppo, a very famous television personality who can reach both younger and older viewers. Noppo was in fact the host at the television show for children "Dekiru kana? (Can you do it?)" that ran for 23 years from 1967 to 1990. This makes him a character that can both be appreciated by children today and be recognized with a feeling of nostalgia by people who might not be so young anymore. Thus, the choice was not a coincidence: the aim was probably to reach as many people as possible, from little children to their

parents. In the commercial⁹⁴ in Figure 55, Noppo, together with the mascot Gonto-kun, explains to some children how to use the KitKat paper package to make *origami*.

⁹³ YouTube. " 絢香 キットカット CM ありがとう篇 ". May 30, 2014. https://www.youtube.com/watch?v=bSSsoFVkojc&ab_channel=GrabowskiMilford.

⁹⁴ YouTube. " 【 CM 】 キットカット ". October 4, 2019. https://www.youtube.com/watch?v=GF3zP9g2KVs&ab_channel=%E4%BD%90%E5%B7%9D%E6%A2%85%E4%B8%89%E9%83%8E.

In summary, in the 2010s, the number and type of commercials diversified a lot along with the celebrities and television personalities that appeared in them.

The second decade of the Two Thousands

In this decade, the theme of paper packaging continues to be important: for Valentine's Day and Easter, special short movies have been made and are available on the official Nestlé YouTube channel. The Valentine's video starts with a couple of children playing with the KitKat paper wrapping, using it to write messages as well, and then proceeds to show the now teenagers use the same paper to declare their love for one another. The Easter video shows some father-son quality time spent drawing on the paper packaging. So, these videos show various ways to use the paper, as well as the fact that people from all ages can have fun with them.

I think that it could be said that this strategy relies on the “Japaneseness” of *origami* tradition, to make it even more appealing to potential customers, on top of the fact that recently there has been an increasing attention to the climate change issue and the related problems, leading to an increasing interest in big companies to show their commitment to a better future for the planet.

Another social phenomenon that is being reflected by the commercials is the new Korean Wave. The most recent ambassadors for the brand are in fact JO1, a group that was made through the Japanese version of a survival TV show that started from South Korea, “Produce 101”, with a style that resembles the South Korean idol training system. The Korean program was extremely popular not only in South Korea but throughout Asia in general, bringing the creation of two more seasons of the show and a Japanese version as well, of which JO1 is the product.

We can also see more interest in the quality of the ingredients in more recent commercials: one of the new flavors is in fact whole wheat biscuit KitKat, whose commercial features Magi Kadowaki, in what is probably a word play with her name since the Japanese word for wheat is in fact “*mugi*”. The commercial⁹⁵ has a very rustic and almost “unprocessed” feeling to it: instead of a real background,



Figure 56 - Mugi Kadowaki in the whole wheat biscuit KitKat commercial, from YouTube

⁹⁵ YouTube. 【 CM 】 ネ ス レ キ ッ ト カ ッ ト . March 8, 2021. https://www.youtube.com/watch?v=OL_Jb3J6fGw&list=PLoZvXEtz4L3NFg_ULXa5PueqV2tSVnkJ7&index=33&ab_channel=%E4%BD%90%E5%B7%9D%E6%A2%85%E4%B8%89%E9%83%8E

there's a drawing of a field, with sun, clouds, and mountains on the back. Mugi is dressed as a farmer and the logo has been changed for the occasion, as it's possible to see in Figure 56, the shapes are purposefully unrefined, and an ear of wheat has been added to the logo.

Another new flavor is high cocoa with cocoa nibs, and the commercial⁹⁶ includes two entertainers at yoga class who talk about the quality of the ingredients.

Comments

So, I think we can safely say that at the beginning, when KitKat had just entered the Japanese market, as it is normal, the company, Rowntree, was not going to invest too much by making specifically Japanese commercials, so they opted for the use of the commercials that were already being used in England.

After years of experience and after seeing that the product was appreciated by Japanese people as well, they decided to invest more and create commercials specifically targeted to Japanese people. Both Rowntree, when it began making commercials for Japan, and Nestlé decided to do the same thing: they adapted to the country. The use of the foreign appeal in the 80s commercials shows that they knew how Japanese people thought, the presence of OLs as protagonists in the 90s shows observance of the social trends in Japan, the representation of entrance exams and of KitKat as a way of encouraging people indicates how much attention they put to what is important in the life of Japanese people. After KitKat passed to Nestlé, the commercials became more “Japanese”, with a setting that wasn't foreign anymore and I would say that KitKat began being treated almost as a Japanese product, inserted in everyday life of Japanese people, be it an office lady, a student taking entrance exams or a person wishing to express their feelings to someone.

The slogan is still “have a break, have a KitKat”, but in Japan they associated the image of KitKat with that of hope, managing to provide a product that is ideal as a gift to offer encouragement, connecting the product to the Japanese language as well.

Another way in which they have adapted to the Japanese market was the use of celebrities in the commercials, on which I would like to focus some attention.

Celebrities in KitKat Japan commercials

Japan tends to use celebrities in their commercials, even more than other countries do. KitKat commercials are no exception, they always used actors who were or became very famous. On the

⁹⁶ YouTube. “ニューヨーク、クセ強キャラでヨガのレッスン!? 「ニブニブ〜」 キットカット新 CM 『「キットカット まるごとハイカカオ+」 カカオニブでニブニブ〜』”. March 4, 2022. https://www.youtube.com/watch?v=LksGcZFkd0o&ab_channel=oricon.

website Teiban Navi⁹⁷ it's possible to see the list of all the actors, singers and entertainers that appeared on KitKat commercials:

- The 70s: popular Scottish pop rock band Bay City Rollers was the protagonist of the first KitKat commercials that circulated in Japan. In 1978 Kenji Sawada⁹⁸ (30 years old at the time), famous Japanese singer, who for a few years was also the vocalist for the Japanese rock band The Tigers, appeared in a KitKat commercial. The use of a Japanese singer was probably thought to somehow give a sense of continuity with the fact that British singers were used in the original commercials. Sawada had already debuted for 10 years when he appeared in the commercial, so he was already known to the public.
- The 80s: from 1985 to 1988 Kumiko Gotou⁹⁹ (11 years old) and Rie Miyazawa¹⁰⁰ (12 years old) acted together in some of the commercials, such as the one in which they go to England, or the ones where they are in Japan, and they are having a tennis training session and take a break. Gotou is a Japanese idol who debuted in 1984 and was active as an actress and singer until she got married in 1995. Miyazawa is a former teen idol, who began her career as a child model. She is now an awarded actress, singer, and fashion model, considered one of Japan's top actresses.
- The 90s: from 1992 to 1996 *tarento* (which is a term used to refer to celebrities or aspiring entertainers) and actress Sae Isshiki¹⁰¹ (15 years old) who debuted in 1991 was chosen for the KitKat commercials. At the time of her debut, so when she was advertising KitKats as well, Isshiki had a pure and innocent image, but she diversified to more spontaneous and comical concepts as she gained more experience and exposure. In 1996 Miho Kanno¹⁰² (19 years old), who is an actress and J-pop singer who debuted in 1992 in the group Sakurakko Club, was chosen for the next commercials. Then again in 1998 Emily Nakayama (20 years old), *tarento* and actress who debuted in 1994 in the drama “おれは O 型・牡羊座 (*ore-wa o-gata, ohitsuji-za*)”. Her activities included mainly acting and commercial jobs at the beginning, expanding to information and variety from the 2000s.

⁹⁷ Teiban Navi. “Kitto Katto CM rekidaishutsuensha ichiran” キットカット CM 歴代出演者一覧 [List of the entertainers who appeared in KitKat commercials]. <https://teiban-navi.com/kitkat>.

⁹⁸ Wikipedia. “Kenji Sawada”. https://en.wikipedia.org/wiki/Kenji_Sawada.

⁹⁹ Wikipedia. “Kumiko Goto”. https://en.wikipedia.org/wiki/Kumiko_Goto.

¹⁰⁰ Wikipedia. “Rie Miyazawa”. https://en.wikipedia.org/wiki/Rie_Miyazawa.

¹⁰¹ Wikipedia Japan. “Isshiki Sae” 一色紗英 . <https://ja.wikipedia.org/wiki/%E4%B8%80%E8%89%B2%E7%B4%97%E8%8B%B1>.

¹⁰² Wikipedia. “Miho Kanno”. https://en.wikipedia.org/wiki/Miho_Kanno.

- The 2000s: in 2001 Takami Mizuhashi¹⁰³ (16 years old), actress who debuted in 2000 in a commercial for J-Phone, appeared in a KitKat commercial, followed by Japanese actress Anne Suzuki¹⁰⁴ (13 years old) from 2002 to 2006. After that, from 2007 to 2010, Kie Kitano¹⁰⁵ (16 years old), actress, singer and gravure idol who made her acting debut in 2007, starred in the commercials about romance and entrance exams.
- The 2010s: in these years we saw a diversification of commercials where different people in the same years were used for different kinds of commercials. We've seen Meisa Kuroki (22 years old), who was the testimonial from 2010 to 2012. Then, in the years 2012 and 2013, Manami Higa¹⁰⁶ (26 years old), Japanese actress who starred in the 2007 *asadora* (short for "asa dorama", which indicates short twenty-minute dramas produced every year that are broadcasted every morning) "Dondo Hare". In 2013, as already seen in the previous section, pop singer and songwriter Ayaka¹⁰⁷ (26 years old) was the chosen celebrity. In 2015 pop and R&B singer May J (27 years old) appeared in a KitKat commercial and KitKat also held an event in that same year, with the presence of the singer, to cheer on students who had entrance exams and to advertise the image of KitKats being a good luck charm for exams. In 2019 Gonta-kun and Takami Noppo stepped up to make commercials to show people how to use the paper packaging while also making people reminisce about their childhood. In 2019 and 2020 Japanese actress Emi Kurara (40 years old) was also the protagonist of a TV commercial for KitKat.
- The 2020s: in 2020 Japanese actress and singer who debuted in 2016 Nana Mori¹⁰⁸ (19 years old) appeared in KitKat commercials, but also awarded actress Mugi Kadowaki¹⁰⁹ (29 years old) for the whole wheat biscuit commercial, and in 2021 JO1 became the official ambassadors of KitKat.

After looking at this list we can see that there are some common trends. While the very first commercials had male representatives, after that for more than thirty years the protagonists were always young women and girls, who had recently debuted in the entertainment industry. At first, the chosen entertainers were younger, with their ages not going over 20 years, while in the 2010s we can see that the number of people increased, and their age range became wider as well. From 2019 we see male characters coming back as the protagonists: first iconic television personality Noppo and

¹⁰³ Wikipedia Japan. "Mizuhashi Takami".

<https://ja.wikipedia.org/wiki/%E6%B0%B4%E6%A9%8B%E8%B2%B4%E5%B7%B1>

¹⁰⁴ Foster & Foster Plus. "Suzuki Anne". <https://www.web-foster.com/artists/suzuki-anne/>.

¹⁰⁵ Wikipedia. "Kie Kitano". https://en.wikipedia.org/wiki/Kie_Kitano.

¹⁰⁶ Manami Higa website. <https://higamanami.com/>.

¹⁰⁷ Ayaka official website. <https://room-ayaka.jp/>.

¹⁰⁸ Mori Nana official website. <https://www.morinanamusic.com/>.

¹⁰⁹ Humanite. "Kadowaki Mugi". <http://www.humanite.co.jp/actor.html?id=24>.

then boy group JO1, which debuted in 2020 through the popular trainee survival show “Produce 101 Japan” made in 2019.

This phenomenon of using celebrities to promote a product is not at all new in Japan. In fact, we will see that it is rooted in an era where television had not even been invented yet: the Meiji era, where famous *kabuki* actors were portrayed holding or using certain products to advertise them.

5.2.2 KitKat Japan’s social media

KitKat Japan has Instagram, Twitter, and YouTube accounts, so I will now see how it uses these social channels, and what the differences might be, based on the use that users make of these tools.

*Instagram*¹¹⁰

As of January 2023, the Japanese KitKat Instagram page has 20,5 thousand followers. Comparing it to the other KitKat pages from different countries, the number is not particularly superior, staying in the range of tens of thousands. The Japanese page posts more often compared to the others and is always showcasing its variety in flavors and the new releases.

One of the types of posts that it uses the most is the quiz, where they’ll ask a question and tell the users to answer in the comments using one of a couple of specific emojis.

Questions include:

- The flavor people prefer out of a few choices,
- The flavor people would like to try next,
- The flavor that they think will be launched next.

I think it’s worth noticing that the name of the account is written in English, and that most of the posts, even though they have a description completely written in Japanese, have images that are easy to understand even without knowing the Japanese language, often accompanied by words in English to summarize the meaning of the post, and the choices in the quizzes.



Figure 57 - [Post](#) from October 28th, 2022

¹¹⁰ KitKat Japan Instagram. https://www.instagram.com/kitkat_japan_official/.

*Twitter*¹¹¹

We can already see a difference with Instagram as this channel is clearly mostly directed at Japanese consumers: the name is written in *katakana* and all the posts are written in Japanese, often without images or explanatory English words.

The numbers are also different from Instagram: with Twitter being one of the most used social media platforms in Japan, it comes as no surprise that out of the KitKat channels on Twitter, Japan's KitKat is the one with the most followers, with 337.5 thousand followers, which is more than fifteen times more than the ones they have on Instagram.

The contents vary, some tweets have the same content as the Instagram posts, but there are more compared to the other platform, and they are updated every couple of days. The contents that are not posted on Instagram are ones that are more specifically targeted to the Japanese consumers, so while Instagram mostly focusses on the different flavors, the Twitter posts also tackle important events in the lives of Japanese people and contests that only consumers in Japan can enter. For example, the latest contest was held in a very short span of time, between the 6th and the 8th of January, and it was made so that the 100th person to retweet the tweet about the contest would win a special KitKat with a package designed in the "Chocolabo" and created to be gifted to students who are going to undergo entrance exams. As of January 12th, 2023, the latest tweet is from January 10th, which is a retweet of a post of the girl who received the special KitKat box as a present from her mother.

As for the New Year's posts, Instagram simply shared a video wishing a happy new year to their followers, but Twitter also posted about *Hatsumode*, which is the first visit to the shrine that Japanese people usually do in the first days of January.

The Twitter posts are thus clearly targeted more specifically to Japanese consumers, with contests, quizzes, and a closer interaction with consumers, showing attention to the contents they are tagged in and retweeting posts that are created by consumers themselves, sharing their stories and experiences about KitKat.

*YouTube*¹¹²

YouTube is probably the channel with the most differentiated content. The contents regarding Japanese KitKat are contained in the Nestlé Japan Official Channel, among videos about all the other products managed by Nestlé. The company, in fact, uploads videos about different products, often dividing them by putting them in different playlists.

¹¹¹ KitKat Japan Twitter. <https://twitter.com/KITKATJapan>.

¹¹² Nestlé Japan Official YouTube Channel ネスレ日本公式チャンネル. <https://www.youtube.com/@nestlewmc>.

KitKat has its own playlist with various types of contents:

- Ads: the YouTube channel seems to have started sharing their ads on YouTube recently, and I think that the reason is the popularity of Japanese commercials on YouTube, which might push official channels to share their ads, rather than letting other people gain from posting the ads illegally.
- The stories behind the birth of specific KitKat flavors: in particular, a lot of attention has been put on the Japanese liquor series, aimed at spreading knowledge throughout the world about different Japanese sakes, such as *sakè* and *umeshu*. The videos feature the producer of this line, Hidetoshi Nakata, and shows the creation process of the product, with the various meetings and taste tests that occur to obtain the desired flavor.
- A virtual tour of the KitKat factory in Japan, in which the whole production process is explained, from the sanitation procedures done by the workers to the machinery used to make KitKat, to the packaging and the transportation, all the steps are explained by people who work at the KitKat factory.

Depending on the content and the target, we can see that the videos might or might not include English subtitles. In fact, the series about the process of the creation of KitKat with the flavors of different *sakès* has subtitles incorporated in the video. We can assume that this is because the main target does not reside in Japan, but abroad, since this is a project to spread the knowledge on *sakè*. This whole project might be part of the strategy of targeting not only Japanese people but also foreigners due to Japan's problem of a decreasing and ageing population. On the other hand, there doesn't seem to be a reason why the Japanese KitKat factory tour would be directed at foreigners, so there are no subtitles.

5.2.3 Considerations

In conclusion, regarding the commercials, we can say that KitKat Japan decided to adapt to the Japanese public, by using a soft selling strategy, which includes the creation of commercials with an emotional or entertaining value to bond with the potential customers and including many celebrities through the years.

When talking about the different strategies that could be used for promoting the product, we saw that there are mainly four options: making no changes to either the product or the message, making changes in the product or the message, or making changes to both. In this case, we could say that the strategy of modifying both has been made: the product was adapted to the local culture and the message as well. Even though the slogan "Have a break, have a KitKat" is used globally, with the meaning that this is a snack fit for a break, the Japanese KitKat gives a wider message, attaching more

emotional values, such as KitKat being a means to express gratitude or to encourage students, and people in general, for important events in the life of people, such as entrance exams but also sport competitions.

Regarding the use of social media, that has also been adapted to the use that Japanese do of these socials, taking into consideration the type of contents they are used to and the social media platforms that are most used by Japanese people. So, all in all, there has certainly been an adaptation to the local market.

5.3 Placement

Nestlé sells in the world in millions of different points of sale, to make the product accessible to as many people as possible. Also, as we've seen, they sell the product in many different formats, sizes, and portions to accommodate all kinds of tastes and needs, so that consumers can enjoy the product "whenever and however" they prefer.

In Japan, KitKat can be found in the supermarket, in convenience stores and in small stores, such as the kiosks that can be found in some train stations. As stated in section 2.2, in fact, food products don't require exclusivity with distributors, so they can be sold from a range of different distributors.

One explanation for the fact that in Japan there are many limited editions of food is actually the fact that they sell in convenience stores, which in fact have a quicker rate of restocking, compared to supermarkets. What this means is that Japanese convenience stores have a restocking routine that happens every week as opposed to supermarkets, that restock every month. This influences the way products are made and sold. With these rhythms, it'll be necessary to have more limited editions and in a shorter span of time, so Nestlé must have created a system that is constantly looking for new flavors and ideas. The Instagram page, as we have seen, is often asking for the audience's opinion, checking what kind of product they would like to try and at the same time displaying unending creativity, with new ideas coming through periodically.

Finally, KitKat can also be bought at the KitKat Chocolatory in Tokyo, the KitKat dedicated shop where fans can buy special flavors and editions of high-quality KitKats made in collaboration with expert chefs or make a personalized bar themselves.

Online shopping

The official KitKat website provides links to buy their products online from retailers, relying on two of the biggest online shopping sites in Japan: Rakuten and Amazon. Both sites offer bundles of bags, not singular bags, probably because it's more convenient. Rakuten offers a wider range of products, from ones that are advertised on the site to others that maybe were older editions.

KitKat’s official shop on the Amazon site offers nine different flavors: the four “*otona no amasa*” series (strawberry, dark chocolate, white chocolate and *fiantine*, and rich *matcha*), all in bundles of twelve bags containing 11 to 13 mini bars, depending on the flavor, for the price of 4,980 yen for the dark chocolate (13 bars), 4,880 yen for *matcha* (12 bars), 4,400 yen for strawberry (12 bars) and 3,800 for white chocolate and *fiantine* (11 bars). Then, there’s also the whole wheat biscuit flavor in a bundle of 12 bags containing 12 bars of KitKat minis for 3,465 yen, the cheesecake KitKats in a bundle of only 6 bags containing 9 bars for 2,320 yen and the original KitKat minis in a bundle of 12 bags containing 14 pieces for 4,580 yen. Finally, there’s also a bundle of 8 boxes of a “Heart Bear” a KitKat in the shape of a bear with a heart, each box contains 6 pieces, and the price was 10,300 yen, but it was already sold out. As of November 2022, most of them are about to end.

All the packages are made of paper and advertise the fact that the KitKats have been made slightly bigger than before.

5.4 Price

KitKat has been priced reasonably in line with products from this market segment in order to be competitive and so that customers will not be deterred from buying.

However, recently, some KitKats have seen an increase in price¹¹³. Specifically, the ones involved are KitKat minis, in bags of 12, and “Variety assort” of 146 grams, sold in convenience stores, and KitKat minis in bags of 14 sold in supermarkets and drugstores. Starting from July 1st, 2022, in convenience stores, the KitKat mini bags went from 324 yen to 356 yen and the variety assortments went from 378 yen to 416 yen. On the other hand, for the KitKat minis sold in supermarkets and drugstores, there was no effective change on the price, but on the number of KitKats contained in a bag, that went from 14 to 13. The reason for this is the increase in the importation price of resources, such as cocoa, sugar, whole milk powder and wheat, which was worsened by the depreciation of the yen.

¹¹³ Shokuhin Shinbun 食品新聞. “Nesure ‘Kitto Katto’ neage ‘Kitto Katto mini’ (12 mai) yaku 10% appu” ネスレ 「キットカット」値上げ 「キットカットミニ」(12枚)約10%アップ [Nestlé KitKat price increase. “KitKat mini” (12) price to increase by 10%]. April 4, 2022. <https://shokuhin.net/54626/2022/04/04/kakou/kashi/#:~:text=7%E6%9C%881%E6%97%A5%E3%81%8B%E3%82%89%E3%81%A8%E3%81%9D%E3%82%8C%E3%81%9E%E3%82%8C%E6%94%B9%E5%AE%9A%E3%81%95%E3%82%8C%E3%82%8B%E3%80%82>

Conclusions

In light of the information on internationalization and entry modes seen in Part I and the information on Nestlé seen in Part II, I'd like to summarize the entry mode chosen by Nestlé. At first, Nestlé internationalized through exports, the least risky non-equity entry mode, but then found reason to internationalize in the lack of resources together with the increasing demand during World War I and started operating abroad as well. Now, "Nestlé has at least 600,000 contract farmers in over 80 developing economies as direct suppliers of various agricultural commodities" (Collinson et al, 2017). We've also seen that Nestlé entered new markets by acquiring existing businesses as well, expanding at the same time the range of products they can offer. For KitKat in Japan in particular, the chosen strategy was entry through licensing, adopted first by Rowntree. This non-equity mode lasted until the year 2000, when Nestlé decided it was time to take the reins.

When considering internationalization, a firm will face the conundrum of having their product have modifications or leaving it unchanged even though it will go to a different market. Glocalization is a strategy that mixes the two, selling the same product but with the necessary changes to the marketing mix depending on the target market. After choosing the country they wish to enter through accurate screenings regarding the general situation of the country, such as the economic position, demographic trends and governmental rules regarding business, the firm can decide to enter the market, and can do so through non-equity, so through exportations and licensing contracts, or equity modes, which involve shared or full ownership of activities. The more experience they gain on the field, the lower the perceived risk, so they will feel they can make bigger investments.

Culture plays a very important role in the definition of the marketing strategy, so the appropriate modifications, if necessary, can be made both to the product and to the message used to promote it. Nestlé firmly believes that "food is a local matter", believing that there is no worldwide taste and that there's thus the need to learn all there is to know about the local culture and tastes, that influence what the consumers eat and drink. "International Business" cites Nestlé as one of the companies that created a management structure that allows them to divide products into those that can be produced and marketed regionally, locally, or globally. Nestlé, in fact, goes by the strategy of "think globally, act locally" (Nestlé, 2014) and, as we've seen, its organization is one that operates globally but is made up by smaller local units, working with Nestlé's principle "centralize what you must but decentralize what you can". Centralization implies that decisions are taken at the headquarters in Switzerland, while decentralization is the action of taking decisions locally, based on what is needed, on the characteristics of the population, the local culture, the demand, the competition, and the market. The mix of the two ensures the best outcome. In fact, "Glocalization works for companies

with decentralized authority structures and for companies that exist and compete in multiple, different cultural contexts.” (Investopedia, 2022)¹¹⁴.

As we’ve observed from the different KitKat sites and from Nestlé’s information on its organizational structure, Nestlé is a global brand but created a different marketing mix in each country, where the company’s subsidiaries manufacture the product adapting it to the local market.

As for the marketing mix that KitKat Japan adopted, changes have surely been made, both on the product, with the predominant shape being the two-finger mini and the special flavors changing multiple times in a year, and on the message, which, even though it still contains the idea that KitKat is a good snack for a break, now includes the notion that KitKat is connected to a feeling of hope that goals will be achieved, making it so that people can buy it to encourage friends and family in important events of their everyday life. The way commercials are made is also in line with the way of thinking of Japanese people, with known celebrities as the protagonists and a soft-selling approach.

The frequent limited editions, which can be seasonal or connected to specific Japanese prefectures, the way the message is delivered through commercials, and the use of their social media platforms, all indicate the fact that KitKat Japan knows the culture, life, expectations, and the taste of Japanese people, which is fundamental to make a marketing strategy successful.

¹¹⁴ Hayes, Adam. “Glocalization: What It Means, Advantages, and Examples”. Investopedia. August 30, 2022. <https://www.investopedia.com/terms/g/glocalization.asp>.

Part III: Japan's characteristics and marketing strategy for food in Japan

After seeing the example given by KitKat Japan's strategy in Japan, I would now like to draw some conclusions on the marketing strategy that could be beneficial to a foreign firm wishing to enter the Japanese market, especially in the field of food and confectionery.

To do so, it is necessary to know some important characteristics about Japan, which were taken into consideration by KitKat as well, so I will first see with more detail some of Japan's characteristics, from the demographic trends to the important events to the usage of social media, to have a better understanding of its culture and the expectations of Japanese customers.

6. Japan and its characteristics

6.1 Objectives and research method

Japan, as any other country, has its own peculiarities and characteristics, and it's fundamental for any enterprise wishing to enter this market to know it well and understand what is expected by the potential customers. In this section we will first see the Japanese cultural background that influences the way that businesses operate, analyzing the Japanese tendency to give an image of being different from other countries, both Western and Asian, and seeing other traditions and habits such as gift-giving and important events that businesses in Japan shouldn't ignore.

Other than internet research, for this part I also conducted some research on my own, with a survey and two interviews. The survey contained questions regarding Japanese commercials and customers' buying patterns, both for normal and special edition products. The questionnaire was answered by 53 people, of which 96% were in the age group of 18-24 years and 89% were girls. They answered from the prefectures of Tokyo, Kanagawa, Shizuoka, Aichi, Osaka, Hyogo, Okayama, Fukuoka, Akita, Yamagata, Tochigi, Niigata, Saitama, and Chiba.

The one-on-one interviews were answered by two girls from Niigata prefecture, both in the age group of 18-24 years old, and the content of the interviews were also about promotion in Japan, especially in the TV commercial sector, and their buying pattern of KitKats and of special edition products in general.

I will be using the answers from the questionnaire and the interviews to complement the information gained from studies, books, and internet research where I think is needed.

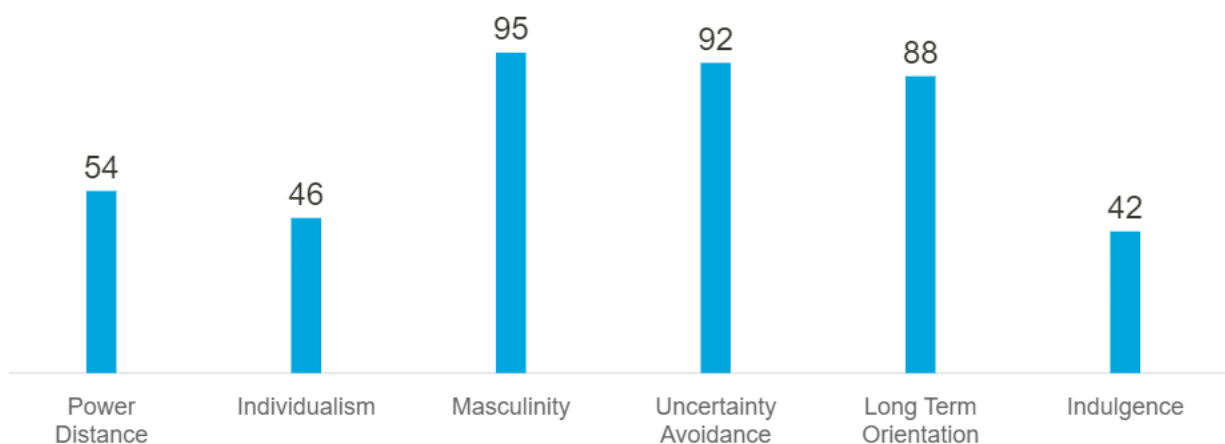
6.2 Cultural background

Every country and every market has its peculiarities, given from the fact that consumers around the world have different tastes that characterize them. In this section, I would like to see the Japanese characteristics that I think would have an important impact on the strategy of a firm that is considering entering the Japanese market. I will talk in particular about the “Cool Japan” and *gotouchi* phenomena, the gift-giving tradition, the tendency to have limited editions, and the events that warrant a change in product flavors – or at least in the packaging –, which I think influenced Nestlé’s strategy and are the very important and influential traits that characterize the Japanese population and culture.

6.2.1 Japan and Hofstede’s cultural dimensions

We’ve seen in section 1.2 that companies need to not only adapt their products to the local culture, but also to adapt their management style to what the locals are used to. There have been many cultural studies in management, with Dutch psychologist Geert Hofstede’s being the best-known, to see what aspects of culture influence the way different countries’ businesses work. Hofstede observed six cultural dimensions – power distance, individualism, masculinity, uncertainty avoidance, long-term orientation, and indulgence –, so I’d like to consider them applied to the Japanese context.

Figure 58 represents these cultural dimensions with a score given to the country taken into consideration, which in this case is Japan. The image is taken from the website [Hofstede Insights](https://www.hofstede-insights.com), which is a consulting organization whose main focus is intercultural management and that offers data-based information on different countries’ cultures, adding on to Hofstede’s studies. We can see that the highest levels in Japan are for masculinity, at 95, and uncertainty avoidance, at 92, while indulgence (42) and individualism (46) are the lowest. This means that Japanese society is driven by



* estimated

Figure 58 - Japan in Hofstede's cultural dimensions, from <https://www.hofstede-insights.com/country-comparison/japan/>

“competition, achievement and success”¹¹⁵, where people tend to try and control their desires. Let’s see in more detail.

Power distance refers to the degree to which people accept the fact that power is not distributed equally in society. Japan’s score is 54, so it’s defined as a “borderline hierarchical society”¹¹⁶. Japanese people are, surely, conscious of their position in society and respect the people who are in higher positions, but still Japan is defined as a meritocratic society and not as hierarchical as other Asian countries. This results, for example, in a very slow decision-making process, because decisions must be confirmed by different layers of the hierarchy and there’s no “one top guy” who can make a decision on his own.

Individualism is opposed to collectivism, where people think of the group before themselves. With the individualism score being 46, Japan seems to be more of a collectivistic society, where harmony of the group often can come before the expression of the individual’s opinion. However, 46 is not that low of a score for individualism, and Hofstede Insights explains this by saying that the “Japanese are experienced as collectivistic by Western standards and experienced as Individualist by Asian standards”. This is because while they do belong in groups to which they are loyal, such as the company they will belong to for several years, they might not have the family culture that other Asian countries do, since the Japanese families are becoming more and more nuclear families where the core is only parents and children. Also, company loyalty is chosen by the individual for the individual, so it could be considered an individualistic decision.

The masculinity dimension shows that Japanese society is driven by competition and success, but since Japan is also a mildly collectivistic society, there is more of a competition between groups rather than between individuals. “What you also see as an expression of Masculinity in Japan is the drive for excellence and perfection in their material production (*monodukuri*) and in material services (hotels and restaurants) and presentation (gift wrapping and food presentation) in every aspect of life” (Hofstede Insights). Firms want to excel, both in the products they offer and in the service to the customers. The care for presentation and packaging is in fact something that we will discuss in more detail in one of the next sections.

Uncertainty avoidance refers to the way a society deals with the future and its unpredictability. Japan, with 96, is one of the most uncertainty avoiding countries in the world. This might be because Japan often must face natural disasters that occur suddenly, so Japan has strict plans and rituals to face these unpredictable events. This, however, seeped into everyday life as well, resulting in the fact that people are often reluctant to do something that doesn’t have a precedent. In corporate Japan, this

¹¹⁵ Hofstede insights. “Japan”. <https://www.hofstede-insights.com/country-comparison/japan/>.

¹¹⁶ Ibid.

translates to the fact that “a lot of time and effort is put into feasibility studies and all the risk factors must be worked out before any project can start. Managers ask for all the detailed facts and figures before taking any decision” (Hofstede Insights), which is something that makes change challenging.

Long-term orientation also deals with how societies prepare for the future while also maintaining links to the past. Japan has a very high score for long term orientation, which means that they tend to prepare for the future. In corporate Japan, this translates to a high rate of investment in R&D, for example, which is important for the innovation, survival, and durability of the company.

Indulgence, finally, is “the extent to which people try to control their desires and impulses” (Hofstede Insights), which heavily depends on how people were raised. Japan has a low score of 42, which puts it on the side of restraint, where people often feel constricted by social norms and feel that if they indulge themselves, they’re doing something wrong.

In conclusion, Japan is a country that is predominantly masculine and collectivistic, which leads to heavy competition between companies and the desire to provide top level products and services to their customers, while also investing in the future and in always improving their product. So, a company that wishes to operate in this country should be prepared to enter a competitive market, where customers’ expectations are high, so they should always aim at high quality, both in the product itself and the way it’s presented, and also at innovating the product to ensure its survival.

6.2.2 Japanese uniqueness and “Cool Japan”

It has been observed that when people are in a country different than their own, one of two things might happen to their behavior: they might exhibit and exaggerate certain stereotypical behaviors connected to their country or, on the opposite end of the spectrum, try to fight the stereotypes actively and suppress those behaviors. One thing that has been observed with Japanese people is that they tend to enhance and highlight the peculiarities of their own culture *inside* their own country. The Japanese, in fact, seem to like to talk about their culture and its uniqueness. For example, there’s even a TV show called “Cool Japan”, where foreigners are gathered to talk about some aspects of the Japanese culture that surprised them.

“Cool Japan” is a term that was born in 2002, from the article “Japan’s Gross National Cool”, written by American journalist Douglas McGray. In this article he hypothesized that the Japanese culture could be a means to maximize economic potential and increase Japan’s soft power, which, as the Cambridge Dictionary defines, is “the use of a country’s cultural and economic influence to persuade other countries to do something, rather than the use of military power”¹¹⁷. It’s a term

¹¹⁷ Cambridge Dictionary. “Soft power”. November 23, 2022. <https://dictionary.cambridge.org/it/dizionario/inglese/soft-power>.

coined by Nye and indicates a non-traditional kind of power that comes from a country's culture and its influence on other countries.

Even though the expression "Cool Japan" was born in 2002, the idea of Japanese uniqueness and the propaganda of Japan as a country that is special and that is both "non-Western and un-Asian" has deep roots that reach the nineteenth century, with the Meiji Restoration that was aiming at creating a civilized and modernized but at the same time exotic image of Japan that could be appreciated by Westerners, in the hopes of eventually bringing Japan to be seen as equal to other Western countries. So, already in that period, Japan was trying to create an image that showed how it was different from other Asian countries, how it wasn't Western but was at the same time modernizing to be considered more civilized – thus the coexistence, still today, of tradition hand in hand with modern technology.

After the Second World War, Japan started to see the US as an example and looked to its popular culture, prosperity, and lifestyle with admiration. However, Japan's miraculous economic growth in the decades that followed made it so that "the worship of the US dissolved into a state of euphoria to celebrate Japan's own economic superpower" (Matsui, 2014)¹¹⁸. That self-confidence was quickly undermined by the burst of the economic bubble in 1992, so McGray's article in 2002 came at a time where Japan was trying to get back on its feet and find ways to become economically stable again, so this explains why the Cool Japan term was instantly picked up and used by the Japanese government and various ministries. At that time, in fact, Japanese companies and products such as Nintendo, PlayStation, Hello Kitty and Pokémon were becoming very popular all around the world, so the idea of promoting Japan through the content industry, mostly thanks to anime (Hayao Miyazaki winning an Academy Award, for example, showed how important the world of animation is as well), *manga* and games, but also more traditional forms of arts such as flower arrangement and traditional theatre such as *kabuki*, came as a natural consequence.

As a part of this "craze" (Matsui, 2014), Nikkei BP, a business magazine, introduced the "Japan Cool Award", given to people who contribute to exporting Japanese culture, while Meiji University introduced the School of Global Japanese Studies in 2007 to "scientifically think about "Japan Cool"" (Matsui, 2014). Different Ministries also started using this strategy to boost Japanese economy, image, and influence back up and created divisions especially designed to think of ways to use the "Cool Japan" effect:

- The Cabinet Office of Prime Minister Jun'ichiro Koizumi established the Intellectual Property Headquarters. Koizumi was in fact the first to address Japanese popular culture products as a

¹¹⁸ Takeshi Matsui. "Nation Branding through stigmatized popular culture: the 'Cool Japan' craze among central ministries". *Hitotsubashi journal of commerce and management*, 48, no.1, 2014: 81-97. <https://www.jstor.org/stable/43295053>.

means to promote Japan and its soft power. The Headquarters established the Working Group on Japan Brand, with the aim of discussing “intellectual cultural resources that were not protected as intellectual property, such as cooking and fashion” (Matsui, 2014), concluding that Japan’s soft power can be increased through food culture and fashion.

- The Ministry of Economy, Trade and Industry (METI) has as its central focus the “export of Japanese content” (Matsui, 2014) and, always as a consequence of the emergence of the Cool Japan policies, it established a Media and Content Industry Division, to promote Japanese content abroad, which in turn also established a Content Industry International Strategy Study Group, pushing for the content industry to be the new leading industry to harness Japan’s economy and to contribute to enhancing the nation’s brand value in both economic and cultural aspects (Matsui, 2014, and Research Society of Content Industry International Strategy, 2003). To do this, various events were established, for example the Japanese International Contents Festival, launched in 2007.
- The Ministry of Foreign Affairs also used Cool Japan policies, with the objective of expanding its cultural diplomacy, creating a new image for Japan through the Cool Japan cultural products, for example, by supporting the World Cosplay Summit and by creating the International Manga Award, which awarded non-Japanese *mangakas*, giving them the possibility to visit Japan for ten days. “There is an organic linkage between public diplomacy, nation branding, and national identity, as they all coalesce around the idea of ‘packaging’ a positive image of the state in an attempt at nurturing an amicable international environment.”, is what Tamaki (2018)¹¹⁹ states and Cool Japan initiatives are seen as something that can help make Japan an attractive destination for inbound tourists.
- The Ministry of Land, Infrastructure, Transport and Tourism wanted to promote the “Visit Japan Campaign”. In fact, “boosting inward tourism has been one of the prime concerns of the Japanese government” (Tamaki, 2018) and, to promote the “Visit Japan Campaign” they used “the female pop duo *Puffy AmiYumi* as its goodwill ambassadors to the US in 2005” (Matsui, 2014).
- The Agency for Cultural Affairs, which is a part of the Ministry of Education, Culture, Sports, Science and Technology is another body “committed to the promotion of the content industry” and has held The Japan Media Arts Festival since 1997.

All in all, the Cool Japan policies were used hoping that the promotion of Japanese uniqueness would help bring more inbound tourists, promote exports of Japanese products, and help revitalize

¹¹⁹ Taku Tamaki. “Repackaging national identity: Cool Japan and the resilience of Japanese identity narratives”. *Asian Journal of Political Science*, 27, no.1 (2019): 108-126. <https://doi.org/10.1080/02185377.2019.1594323>.

the Japanese economy. Cool Japan policies were also used to boost the image and trust in Japan after the disaster of Fukushima in 2011, to be able to rebuild what was destroyed and promote tourism once again.

One of the flaws of the Cool Japan term is that it is very ambiguous, but the other face of the coin is that this means that it can be interpreted and used in many ways with a lot of flexibility in many fields and genres. A consequence of this ambiguity is that it leaves space for the previous image that Japan was trying to portray, that of a unique Japan, certainly not Western but also different from other Asian countries. So, even though Cool Japan is a relatively new phenomenon, Tamaki (2018) argues that its way of presenting Japan is not that different from the nineteenth century propaganda, though now Japan is certainly pushing a peaceful image compared to those times. Tamaki, in fact, notices that “the organizers of Tokyo 1940 exploited an image of Japan as a unique entity” and that that image was not that different when advertising the Tokyo 2020 Olympics.

Prime Minister Shinzo Abe was also a supporter of Cool Japan initiatives, stating that “Japan needs to be at the forefront of liberal trading regime, as this is the only way through which Japan’s unique regional brands such as Matsuzaka beef, Yūbari melon, and Uonuma koshihikari rice can be promoted worldwide” (Tamaki, 2018 and Abe, 2015¹²⁰). Cool Japan is also considered to be important in attracting people from other countries because it could be part of a solution to the problem of Japan’s declining population, which leads to a need for workforce.

On top of all the Cool Japan policies established by the various bodies of different ministries, there is also a television show called “Cool Japan”, launched in 2005 by the broadcasting channel NHK, that gathers foreigners living in Japan to comment on some unique cultural aspects of the country. Each episode is centered around one peculiarity about Japanese culture, such as how Japanese people behave at the restaurant, that gets then discussed by the people on the show to gain some insight on what foreigners think about it and what differences there may be with their own countries. These are behaviors that might in fact seem normal to Japanese people but may cause some kind of “cultural shock” to the people coming to Japan.

One of the ways in which this whole phenomenon is manifested is in product packaging: a packaging made in a Japanese style is still very much appreciated by the Japanese customers, as Suarez et al (2020) state in their study “Understanding Japanese consumer behaviour and cultural

¹²⁰ Abe, Shinzo 安倍晋三. “Abenomikusu no seihi wo tou ‘ichioku sō-katsuyō’ waga shin-i” アベノミクスの正否を問う「一億総活用」我が真意 (Appraising Abenomics: My determination with mobilising 100 million). *Bungei shunjū* 94–103, 2015.

relevance of gift giving”. As we have seen in the previous chapter, KitKat’s packaging is always well thought out and sometimes shows Japanese characteristics.

Understanding this need to promote Japan’s culture abroad, a firm could think of different ways in which they could contribute: KitKat for example made the KitKat *sakè* line in order to spread the knowledge on Japanese liquors. Also, to promote Japan and its culture, a firm in the food industry could make flavors of their product using special ingredients that can only be found in special parts of Japan, as KitKat and many others have done in their *gotouchi* lines.

6.2.3 Gotouchi

We’ve talked about globalization and how it influences products and, consequently, people’s tastes, making them more standardized and uniform. However, there are still differences between countries and, even inside countries, between different parts of the countries themselves. Japan develops from north to south and thus has prefectures characterized by different climates that will naturally offer different fruits and products. Also, some prefectures face the sea, some others have mountains, and this certainly influences the terrain and what it can offer. These differences can be celebrated and promoted through *gotouchi* products.

The word ご当地, read as “*gotouchi*”, literally means “the place”, with the honorific *go-* added at the beginning. It’s a phenomenon that has started relatively recently and it’s aimed at highlighting and celebrating the charms of different prefectures in Japan, to promote each one of them. This movement became necessary after the big economic growth that Japan saw after the Second World War. In fact, a consequence of this economic boom was that many young people left their hometowns to go to urbanized cities such as Tokyo. To this day, this migratory phenomenon has not shown signs of stopping and, combined with the population’s age that is increasing every year, has produced a problem that consists of countryside cities and villages having fewer people and, especially, fewer young people, leaving mostly elder citizens behind.

The need to promote every region has come from this problem and local governments have thought of many ways to prevent any further depopulation and reinvigorate local communities. To do this, for example, there have been “*gotouchi kentei*”, exams that test people’s knowledge on a specific prefecture’s history, culture, and industry, allowing people to both test their own knowledge and to learn new things about their own prefecture but also to spike the interest in these places. The Kyoto Chamber of Commerce and Industry was the first to create this kind of test in 2004 and after that many followed. In 2006 a Nintendo DS game software was launched: the “*Gotouchi Kentei*”.

In recent years, there has also been a boom in local mascots, called *yuru-kyara*, for example the very famous Kumamon. They're all characters that are easy to know and love and thus also help promote the local culture and visits from foreign countries. These mascots are so popular that in 2009 a big festival was held in Hikone, attracting around 72000 people from the whole Japanese territory.¹²¹

This is a trend that can also be used by businesses that want to create limited editions of products. The term *gotouchi*, in fact, is very wide and can be referred to any kind of product, be it food or gadgets. As we've seen, KitKat Japan offers *gotouchi* KitKats, with different flavors for different regions – not necessarily every single prefecture –sometimes grouping a few of them together or making more than one flavor for the same prefecture. Another example is Starbucks that, in 2020, created a series of special Frappuccinos that were inspired by specific products of the 47 prefectures, each of them having a special Frappuccino, available in only that prefecture.

These products will only be available in the specific prefecture, so, if someone goes on a trip, they would make for great gifts to bring back to family and friends, from both the point of view of Japanese tourists and foreigners.

According to the research I made, 27 out of the 53 people who answered the questionnaire said that they have bought KitKat as a present: out of those people, 17 answered what they bought and the vast majority, 12 people, answered the *gotouchi* products. From the interview I made, this came out to be the most logical conclusion, since when someone goes on a trip and wants to bring presents to their friends, they will choose something that is easy to transport and also represents the local specialties as well. The *gotouchi* KitKat were clearly thought for that purpose, hence the name of the category “*omiyage*” which translates to “gift”. The other flavor that was gifted was the *matcha* flavor, for foreign friends, since *matcha* is famously connected to Japan.

So, the *gotouchi* phenomenon was born to promote local communities and can be also used by firms in their strategy, providing different versions of their product which would make for great souvenirs.

6.2.4 Gift-giving

Japan has a well-established tradition of giving gifts to the people who took care of you during the year. There are two main periods in which presents are given: one is during the summer, “*ochuugen*”, the other is at the end of the year, “*oseibo*”. The presents are given to people who have a hierarchically superior position, to thank them for their guidance and help. A good kind of present is something that

¹²¹ Click Japan. “*Go-tochi* boom: We love local”. 2009. https://www.tjf.or.jp/clicknippon/ja/archive/docs/TB22_E.pdf

might be useful, and it shouldn't be something that might take up much space, so food is often chosen as a present.

Aside from that, there's also a strong culture of “*omiyage*” in general: when someone goes to vacation in some specific place, it's expected of them to bring something back to their coworkers and friends. That's why *gotouchi* versions of food can be very useful in these occasions: it's a flavor that can only be found in that specific prefecture, so it can represent it well.

According to the people I interviewed, something that makes for a good souvenir is either something to eat or something that can be used in everyday life. In particular, to the question “What makes for a good souvenir?” one of the interviewees answered:

“Something that contains a good number of product inside. If I want to give some of it to my friends, it's better if it's a bag containing singularly wrapped chocolate or cookies.”

What she meant was that when it comes to food, she found bags that contained single wrapped confectionery (as opposed to a bag with unwrapped confectionery) to be easier to buy as a present, because she could buy the whole bag and still be able to divide the content in little bags to give to her friends. Japanese KitKats are clearly thought to be shared or given as presents: they are wrapped individually and each wrapping contains a special message already printed on it, but also a section where the person gifting the chocolate bar can write a short personalized message.

6.2.5 Limited editions

Limited editions are a substantial investment to make, as they require constant innovation and changes to the product, but, if used in the right context, they can give great results: they can bring in new customers thanks to the novelty of the product, but also draw back lost customers and keep the current customers interested. Limited editions might spark conversations, bringing attention to the original product as well.¹²²

The Japanese market sees a lot of limited editions that follow each other at a very quick pace, Japanese people are said to be very receptive to the charms of limited editions and they are also used to them, so in the questionnaire I prepared I also inserted an optional question asking the personal opinion of the people answering, regarding why they think that limited editions are so popular in Japan. A phrase that came up multiple times was “日本人は限定という言葉に弱い (*nihonjin-wa gentei toiu kotoba-ni yowai*)”, “Japanese people are weak to the words ‘limited edition’”: 11 people out of the 48 that answered the question used these exact words. Limited editions in fact create interest

¹²² JustFood. “Limited edition foods: A limited function?”. January 24, 2005. <https://www.just-food.com/features/limited-edition-foods-a-limited-function/>

in the product and make the consumer want to try it, because the number is scarce, and it won't last long. One of the people I interviewed said:

“As to why people buy these limited editions, I think it's because people can buy them without worries: if it's a brand we already know, we think ‘There's no way this could be bad!’ so we buy them without thinking too much about it. If companies were to always sell the same product people would quickly lose interest.”

Another answer that came up frequently in the questionnaire when talking about the reason for the success of limited editions had to do with seasons: 8 people pointed out the fact that Japanese people give importance to the four seasons. Furthermore, from both the interviews I made, it was said that people almost come to *expect* certain limited editions, because depending on the season some specific flavors will be available. One interviewee said:

“If a certain product is advertised only at a certain time of the year, when people see its commercial, they will think ‘Ah it's already that time of the year’ and they will think that since the season has come, they want to eat a certain product, so sales will increase. The company can also see if the product was successful and think of improvements they can make for the following year”

So, people will come to expect these flavors when a certain time of the year comes, which will also lead them to buy the product.

Another reason for limited editions is that the products are sold in convenience stores, which are refilled weekly, making it easier for businesses to launch new products constantly.

Glico's global website has made an article from an interview made to a group of foreigners living in Japan¹²³. The interview was about the presence of seasonal limited editions in Japan and how they were perceived by non-Japanese people. The group interviewed included people from China, France, India, Indonesia, Sweden, and Vietnam. What comes up from the article is that while other countries don't have that many seasonal limited editions where sweets are made in the flavor that is typical of the season, many Japanese products will have those seasonal flavors.

Limited editions turn out to be a double-edged sword: while the people interviewed said that it was a pity that limited editions exist only for a short time and that if you don't catch that window of time you might lose the opportunity of trying the new flavor, it is true, on the other hand, that that itself is part of the appeal: they are a “once-in-a-lifetime pleasure”, which is something that encourages people to buy the product because they don't want to miss the chance. The article proceeds

¹²³ Natsumi Ouchi. “Japan's ‘Seasonal Limited Editions’ are Full of Surprises”. Glico global. <https://www.glico.com/global/feature/season/>.

to provide a timeline, shown in Figure 59, of how the seasonal limited editions are divided in the year and what flavors are typically used in those periods.

Approximately, the seasonal flavors are as follows:

1. “January to March - Strawberry
2. March to April - Cherry Blossom
3. May to June - Matcha (green tea)
4. June to July - Cherry
5. July to August - Watermelon
6. August to September - Peach
7. August to October - Grapes, Pears
8. October to November - Sweet Potato, Chestnuts, Pumpkin
9. December to January - Oranges

(Depending on the weather and type, the time the ingredients are in season may change)¹²⁴



Figure 59 - Seasonal flavors in Japan, by Glico

On a psychological level, these limited editions push the consumer to buy the product, because there's only a short window of time in which they can try that specific product, so this will put pressure on them to buy it. One of the people I interviewed said:

¹²⁴ Ouchi, Natsumi. “Japan’s ‘Seasonal Limited Editions’ are Full of Surprises”. Glico global. <https://www.glico.com/global/feature/season/>.

“Since they won’t be available forever, I will want to eat them while they’re there. In this sense, the word ‘limited’ is very strong, and we’re weak to it”.

Some of these flavors are connected to some important events in Japanese people’s lives. For example, cherry blossoms give a spectacular show in March and April, which is an event that’s so popular that so many people gather that it might be difficult to find a place to sit in parks where one can admire the cherry blossoms. The observation of nature and its appreciation is a tradition that has been around for centuries in Japan, in fact one of the most common subjects for poetry in the Heian era, the golden era for Japanese arts, was in fact that of admiration for nature’s beauty. That being said, nature’s admiration remains to this day, in some form, such as the admiration of cherry blossoms, and also autumn leaves when they become red in the fall. During cherry blossom season, it can be observed that convenience stores are invaded by cherry blossom themed products, foods in the flavor of cherry blossom, such as KitKats, Pocky, but also drinks such as Fanta, Coca Cola, and even Starbucks makes special cherry blossom themed drinks.

This is also the period when the results of entrance exams come out, which are one of the most important events in young people’s lives. There are entrance exams for high schools and for universities, and it’s said that it’s very difficult to enter Japanese universities. Students will start studying for these entrance exams years before the exams themselves.

KitKats are seen as a good luck charm in these moments, because of the assonance with the phrase “*kitto katsu*”, “I (you) will surely win” and they are often bought in this context. The “*kitto katsu*” interpretation of the name of the product, in fact, makes it so that the chocolate bar can be gifted to someone else as an encouragement when an entrance exam, or a sports event, or something similar, is near. Both people I interviewed said that, in the context of “*kitto katsu*”, they received KitKat bars from their teachers or friends as an encouragement:

“Before exams, when I was in middle school our cram school teacher used to give us KitKats to encourage us for the exams, which is when I first heard of the KitKat assonance with the phrase ‘kitto katsu’ ”

Also, one of the people who answered the questionnaire I made also said that they’re a teacher at *juku*, cram school, and that they have bought KitKat for their students to encourage them for upcoming exams. So, it’s clear that KitKat was quick to pick up the assonance and to spread the message, on the basis of a good understanding of Japanese culture and people’s lives.

Other events that should be taken into consideration are Valentine’s Day, where chocolate is the main protagonist, followed by White Day, on March 14th, a particular event, that might not be very known abroad, where boys and men give white chocolate to the girl who gave them chocolate on

Valentine’s Day. Other events of Western origin are Easter, Halloween, and Christmas, for which firms don’t miss a chance to create special editions.

6.3 Demographic trends

When a business wants to expand, it will have to make observations on the population to understand what their target would be. In order to make these observations there’s a few sites that might be useful, and I’d like to consider the World Bank Data¹²⁵, which contains data on many different fields, from agriculture, to economy and to gender, pertaining single countries and the whole world.

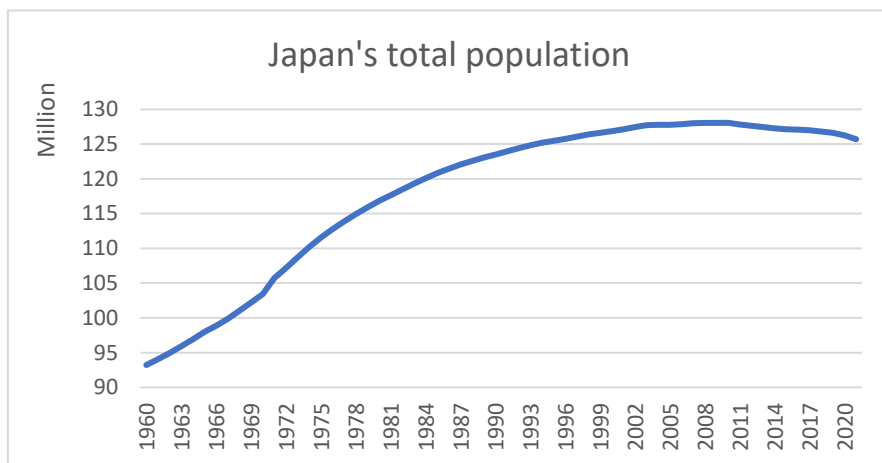


Figure 60 - Japan's total population from 1960 to 2021

First of all, let’s consider Japan’s total population, shown in Figure 60. According to the World Bank Data, the last recorded value for the total Japanese population was 125,681,593 in 2021. As we can see from Figure 60, in 1960 it was just above 93,000,000 and in the

following decades it saw a consistent increase until the next century. We can observe that in the 2000s a plateau has been reached, followed by a slow and constant decrease from 2011.

This phenomenon is certainly strictly connected to the decreasing fertility rate – which is the number of children born alive per woman “as a proportion of the average annual population of women of the same age.”¹²⁶. According to the data from the World Bank, Japan’s fertility rate in 2020 was 1.3. Assuming that the value that enables the population number to stay the same, without either increasing

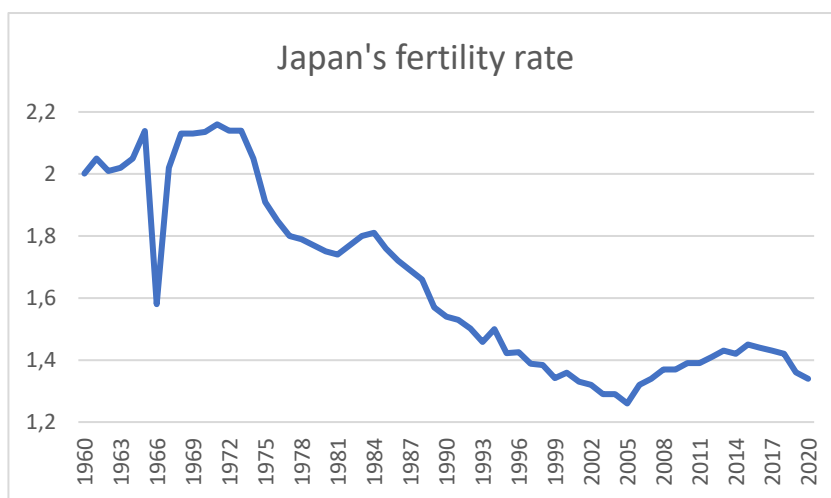


Figure 61 - Japan's fertility rate from 1960 to 2020

¹²⁵ World Bank Data. <https://data.worldbank.org/indicator>.

¹²⁶ Insee. “Definition - Fertility Rate”. January 27, 2021. <https://www.insee.fr/en/metadonnees/definition/c1872>.

or decreasing, is 2, the prospects for the Japanese population are most likely of slow decrease. As we can see from Figure 61, the fertility rate in 1960 was 2 and increased in the following years but had a sudden and deep fall, to 1.6, in 1966. This, however, can be explained by the fact that that was a year in the Chinese Zodiac that was considered to be bad to be born. It's an event called “ひのえうま (hi no e uma)” that occurs once in sixty years, and it is believed that girls born in this year will grow to kill their husband¹²⁷. The next year the fertility rate went back to normal, close to its original value of 2.1. From 1973, on the other hand, there has been a slow and steady decrease: when the value 1.6 was hit again in the 90s, it wasn't because of cultural beliefs, but it was because of a systematic and inexorable downward trend. 2005 was the lowest point, at 1.3, but it went slightly back up in the following years, just to decrease again in 2020.

The reasons for this decrease are many and complex, some of which could be the higher standards of life and the cost of raising children, that make it so that future parents want to give their children a higher quality of life, thus deciding to have fewer children. Another reason is that, even though more women have started to work in order to balance the higher cost of life, Japanese men often still don't help with childbearing or with house chores, making it less likely for women to want to have more children.

The result is a low childbirth rate – the ratio between the number of children born alive and the total population for the year – which went from 17 in 1960 to 7 in 2020, with a sudden decrease in 1966, that was quickly balanced the next year.

So, all of this adds up to the fact that Japan's population has

seen a constant growth from 1960 but has reached a plateau in the early 2000s and has been slowly but steadily decreasing since 2010, as seen previously.

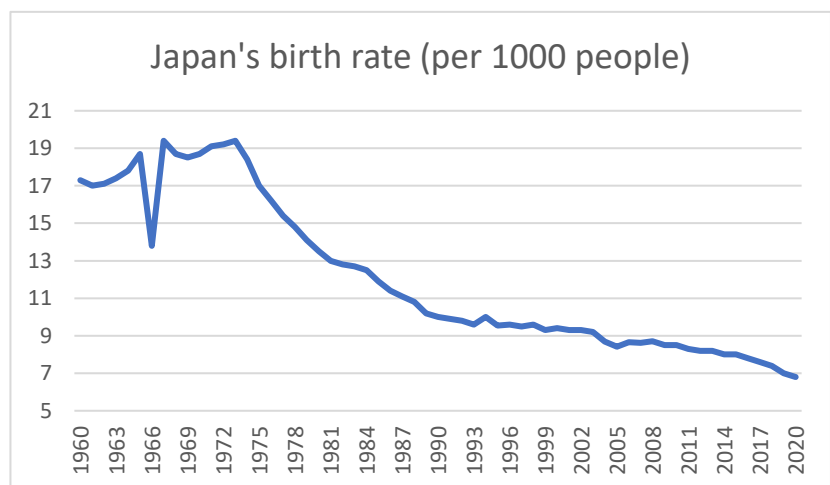


Figure 62 - Japan's birth rate from 1960 to 2020

¹²⁷ Wikipedia. “Fire Horse”. https://en.wikipedia.org/wiki/Fire_Horse.

Finally, I would like to analyze the Japanese population according to age. As shown in Figure

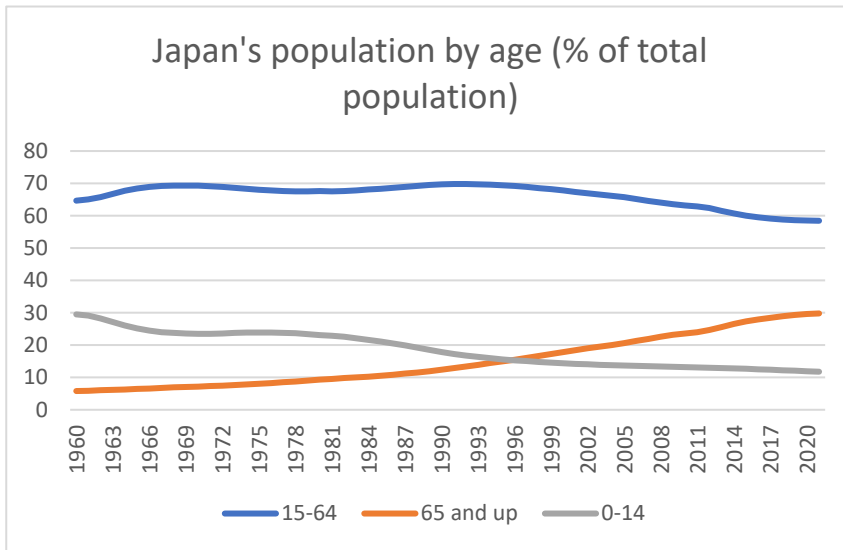


Figure 63 - Japan's population from 1960 to 2021, divided by age

63¹²⁸, compared to fifty years ago, the values of people of age 0 to 14 years old and 65 years and up have almost switched: the number of older people started by being inferior to the number of younger people and newborns, but as time went on the number of the elderly has been steadily increasing, while the number of births has decreased. This will inevitably

lead to a slow decrease of the population aged 15-64: in fact, the population in the middle, 15 to 64 years old, has been decreasing since 1995. In 2021, the population aged 0-14 represented 12% of the total population, the population 15-64 was 59% and people over 65 represented 29%.

All this data supports the idea that the Japanese population is most likely going to continue decreasing and becoming older on average, which will lead to a decreasing pool of potential customers through the years. A business always has to look forward and think of the future, for its own survival, so, from the analysis of these trends comes the idea of having foreigners visiting Japan as an important part of the target as well. Other than enlarging the pool of possible customers, this strategy also goes hand in hand with the idea of making the product look more Japanese, since it's something that, as we've seen in the previous paragraph, is appreciated by the Japanese consumers, and at the same time would help make the product more appealing to tourists as well. After all, it is normal for someone going on a trip to a different country to think of bringing something home, either as a souvenir or as something for themselves.

Also, as seen in the "gotouchi" section, this is a problem that affects rural cities the most, since younger people leave to go to work in bigger cities, leaving the elderly behind, so promoting rural areas and their products is going to be beneficial.

¹²⁸ World Bank Data. "Population ages 0-14 (% of total population) - Japan". <https://data.worldbank.org/indicator/SP.POP.0014.TO.ZS?locations=JP>, "Population ages 15-64 (% of total population) - Japan". <https://data.worldbank.org/indicator/SP.POP.1564.TO.ZS?locations=JP>, "Population ages 65 and above (% of total population) - Japan". <https://data.worldbank.org/indicator/SP.POP.65UP.TO.ZS?locations=JP>.

6.4 Commercials in Japan

Types of commercials

Japanese commercials are known and appreciated around the world for their peculiarity and the fact that they are usually fun to watch, thanks to the interesting stories they tell and the music they use. I would first like to take a step back and talk about two different types of commercials, just to have a better understanding of commercials in general and of Japanese commercials in particular.

Ólafsson (2014) explains that there are mainly two types of commercials: hard selling and soft selling. A hard selling commercial is the type of commercial whose main objective is to put pressure to the potential consumer so that they buy the product. These commercials are made so that they communicate a sense of urgency, giving the audience the perception of an immediate need that they didn't have the moment before. These commercials usually rely on phrases that put pressure on the consumer, such as "There's only a few left!" or give a short time limit stating that if the customer waits, they might lose a great opportunity. Another characteristic of hard selling is the comparison with other products, saying that their product is the best and often using "overstatements, unrealistic results, words like "leading" and "number one", and comparisons to competitors" (Ólafsson, 2014). This kind of advertising doesn't create any kind of bond with the consumer and, on the long run, probably helps create a sense of distrust rather than trust in the brand, because it's very clear that the main goal is to have the viewer feel the need for and eventually buy the product.

The concept of soft selling is the opposite of that: it aims at creating a bond with potential customers, through stories that might not have much to do with the product itself, but that reach the heart of the viewer through relatable situations and sometimes touching stories, combined with the right kind of music. These kinds of commercials don't make comparisons with others to bring themselves up, and don't put pressure on people to buy the product; they create stories that resonate through the viewer, be it in a moving way or an entertaining way. "Soft-sell establishes an emotional appeal and underlines the company reputation to win the trust and respect of the viewer" (Ólafsson, 2014).

According to Ólafsson (2014), Japanese commercials, compared to other countries in the world, have a tendency of being mostly soft sell commercials. "Advertisements in Japan avoid touting the benefits of the product because it could be seen as insulting to the intelligence of the viewer" says Ólafsson (2014). So, in Japan, it's most important to not only establish a connection with the viewer, but also to gain their trust by showing them respect. One more element that Ólafsson added was that Japanese companies are also reluctant to make other companies lose their face, so they avoid making comparisons in their commercials.

Both people I interviewed confirmed that Japanese commercials are mostly the soft selling type and that they generally don't make comparisons to other companies, unless it's something like a detergent.

“I think soft sell is indeed more prevalent here. There aren't many commercials where the company makes comparisons with other companies, but rather they will introduce their product. I think it's better if a commercial has a story, it will be more successful, especially if there are memorable characters. For example, there used to be the 'arigatou usagi ('thank you bunny')' which was extremely popular some time ago.”

One of the interviewees also said that some commercials have stories that aren't self-conclusive but that develop over time through the launch of new commercials, making a series out of these advertisements, which makes them more fun and engaging, with characters that viewers grow to like.

As a result of all these tendencies, we have Japanese commercials that are entertaining, with fun stories, and another result of the prevalence of soft selling commercials is that Japanese people don't have too much of a negative image of commercials, compared to people in other countries, because they don't see them as a nuisance but rather as entertainment (Ólafsson, 2014), often because there are always popular actors or idols as protagonists.

So, when advertising to the Japanese customers it's important to build a bond of trust, show respect and create stories that the consumers can relate to, that are fun or that bring emotions, all to create a connection with the viewer. This is the kind of commercial that is expected by the Japanese consumers.

A brief history of the evolution of Japanese advertisement

That being said, have Japanese commercials always been this way? Let's find out by considering the history of Japanese commercials. To better understand how we got to today's advertising methods, I'm going to start from the history that lies behind it. Thanks to [The Ad Museum Tokyo](#), we can find a lot of information on the history of Japanese advertising, which I will try to summarize in this section.

The Japanese advertising history seems to have its roots in the Edo Period (1603-1868). During this time, *nishiki-e* – a type of colored woodblock printing used often in *ukiyo-e*, invented in the 1760s, in which different woodblocks were used for every color¹²⁹ – were mostly used for advertisement. They could be considered a predecessor to today's fashion magazines and posters, and they also

¹²⁹ Wikipedia. “Nishiki-e”. <https://en.wikipedia.org/wiki/Nishiki-e>.

advertised performances and events. Product placement was already in action during this period, as *kabuki* plays often contained the names of stores and their products.

Much similarly to today, where celebrities are a very important part of commercials, famous *kabuki* actors were represented together with some products in advertisement *nishiki-e*, promoting word-of-mouth marketing as well.

In 1683 *hikifuda*, advertising woodblocks, were invented and used as flyers, though they would get popular mainly in the 1800s. Peter Drucker states in his “Management”, that marketing began at that age, thanks to Mitsui Takatoshi. Other means of advertisement were board games that featured shops and products, called *esugoroku*. A great part in the evolution of advertisement in this period was also played by Echigoya, the ancestor of the Mitsukoshi department store.

Following the Edo Period, the Meiji Period (1868-1912) has been characterized by an incredible growth and development in technology, infrastructure, culture, literature, taking Japan and Japanese people by storm, since the country was trying to achieve hundreds of years’ worth of technological evolution in the span of just a few years. Roads, infrastructure and vehicles, everything was modernized and influenced by the Western culture, even the way people dressed changed: the Emperor was seen wearing both Western clothing and traditional Japanese clothes depending on the occasion, and so other people began behaving the same way.

This surely affected the advertising scenery as well, both in the content represented and in the technology used to create these messages: newspapers and magazines became central to the advertising world and horse-drawn carriages and people wearing western clothes started appearing in advertisements (as it’s visible in Figure 65, for example), showing the influence of Western culture.



Figure 64 - Kabuki actors Ichikawa Danjuro VII and Iwai Shijaku advertising Edoko and Kotoko tooth powders, promoting word-of-mouth marketing, from The Ad Museum Tokyo



Figure 65 - Nishiki-e where the changes in the scenery in Japan can be seen, from The Ad Museum Tokyo

It's also in this period that the word “advertisement”, “廣告 (*koukoku*)” made its first appearance, in 1872, on the 600th issue of the Yokohama Mainichi Newspaper.

Tobacco, cigarettes, and over-the-counter drugs producers began competing both with local and with external competition, and this produced “new sales promotion ideas, such as giveaways and street advertising”¹³⁰.

子菓洋西の永森



Figure 66 - Poster advertising Morinaga's Western Confectionery, from The Ad Museum Tokyo

The Western influence introduced large-size printing, making the creation of a new medium, posters, possible. Figure 66 shows a poster that advertises “Western confectionery”, sold by sweets manufacturer Morinaga.

Following the Meiji Period, the Taisho Period was very short, went from 1912 to 1926, and was characterized by Japan's economic growth and the “emergence of a mass-consumption society”. In the Meiji Period we saw that the Western influence was being represented, but the means of representation were still often made in Japanese style. In the Taisho Period, however, the Western technology began being used more.

¹³⁰ The Ad Museum Tokyo. “Japanese Advertising History. Meiji Period”. https://www.admt.jp/en/exhibition/jp_ad_history/meiji/

In 1922 Japan's first poster that featured nudity also came out, advertising red wine. The poster, visible in Figure 67 is not a drawing but a photo, another sign of the advancement of technology. The picture is in black and white except for the product being advertised, the wine.

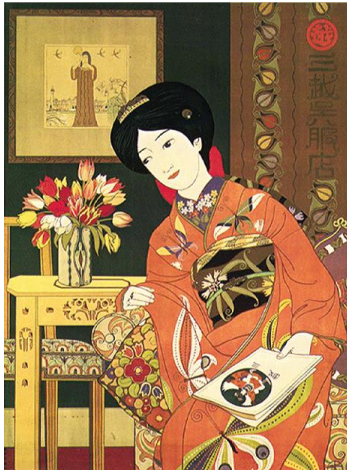


Figure 68 - Poster advertising Mitsukoshi Kimono store from The Ad Museum Tokyo

An important artist in this context is Hisui Sugiura, a designer that “pioneered commercial art in Japan”¹³¹, with his designs for posters and front covers for magazines influenced by *art nouveau*, of which Figure 68 is an example. The subjects are often female, and the style of drawing is different from that of original *ukiyo-e* style.



Figure 67 - Japan's first poster featuring nudity, from The Ad Museum Tokyo

The Showa Period continued the trends started in the Taisho Period, with the modernization and internationalization of advertising expression, which represented more and more the mixture of Japanese

and modern Western culture. The change of urban life and its enjoyability can be recognized from the advertisement posters. There were also adverts aimed at encouraging foreign tourists to go to Japan.

However, things changed with the Second World War. During the 1930s, Japan went through a period of strong authoritarianism, mixed also with the rise of xenophobia. Because of the war, advertisement campaigns became more aimed at boosting the population's morale, encouraging cultivation to fight the food shortages and to spread the government's propaganda.

After the war, Japan was under the American occupation.

In the 30s, television was introduced in Japan as well, in 1939 there was an experiment to test the television broadcasting from NHK¹³², but regular broadcasting started after the war, in the 50s. The number of sets of television



Figure 69 - Poster from 1944 encouraging people to "make pumpkins", from The Ad Museum Tokyo

¹³¹ The Ad Museum Tokyo. “Japanese advertising history. Taisho Period”. [Japanese Advertising History Taisho Period | Exhibitions | The Ad Museum Tokyo \(admt.jp\)](http://www.admt.jp/).

¹³² NHK (Japan Broadcasting Corporation). Terebi wa shinka suru – Nihon housou gijutsu hattatsushoushi. テレビは進化する - 日本放送技術発達小史 [The evolution of TV - a brief history of TV technology in Japan]. “Can You see me clearly?” Public TV image reception experiment (1939)”. <https://web.archive.org/web/20130101044401/http://www.nhk.or.jp/str1/aboutstr1/evolution-of-tv-en/p07/column/index1.html>

increased from 3000 to 12 million between 1953, year in which NHK General TV and Nippon Television were launched, and 1960, right after the royal wedding of Crown Prince Akihito¹³³.

In this period and through the 70s many commercials were actually on the hard-selling side, they were very different from the soft-selling commercials of today's Japan. However, after years of this kind of commercials, people started to see these hard-selling commercials as manipulatory and to be less likely to believe in their message. Also, during the 80s, an insider trading and corruption scandal, known as the Recruit scandal, hit the Liberal Democratic Party. As a consequence, the general level of trust that the public had, be it for politicians or for TV commercials, decreased significantly.

In this period filled with increasing distrust, the turning point happened in the 1980s, when one commercial¹³⁴, starring famous comedian Beat Takeshi came out. It was a toothpaste commercial, and it had Takeshi as the protagonist. The setting was like a comedic scene: there were two characters, where one had to choose between an old and a new toothpaste, which was the product being advertised. When the man started to go for the old one, he ended up being slapped in the head by the comedian, as if saying that obviously he should choose the new one. Being an entertaining commercial, this is seen as the commercial that changed the scenery of the Japanese television commercial culture, a precursor to today's fun and entertaining ads.

Celebrities in Japanese commercials

The use of celebrities in commercials is a common strategy all around the world, especially in the soft sell category. Celebrities in fact help create a positive image of the product and the company itself. Japanese commercials always display famous entertainers, idols, actors, and athletes as their protagonists. As seen in the previous paragraph, this is a trend that already has roots in the Edo Period, where famous *kabuki* actors were portrayed using the advertised product. Over 70% of Japanese advertisement has some sort of celebrity, says Ólafsson (2014), be it an actor, an athlete, or a famous entertainer, which is a lot more compared to other countries: this percentage is in fact only 10% for Europe and 20% for the USA (Ólafsson, 2014).

Japan has also a lot of “*tarento*” (Japanized word for “talent”), young people trying to enter the entertainment industry through talents such as acting, singing or being funny. The system of using celebrities for commercials is important for both parties: the company can create the image they want to portray, and aspiring actors see commercials as potential steppingstones in their careers. The celebrity's image is used to gain a positive image for the company itself, though this used to happen

¹³³ "How receivers grew". *Variety*. 14 May 1975. p. 116.

¹³⁴ YouTube. デ ミ ュ ー ト サ ン ス タ ー CM. June 20, 2009. https://www.youtube.com/watch?v=wwfmUsxib_o&ab_channel=callfromthepast.

in the past more than now, since at the time they usually were connected to one brand in particular, “lending” their image to that special brand, while now one celebrity might be endorsing more than one brand (Ólafsson, 2014). Still, since the airtime of commercials is very short, companies believe that they can make the best of that short time by hiring a celebrity, which will then also appear on posters and cardboards, attracting more attention than an unknown model could.

A downside to this trend is that binding the image of the company to a certain celebrity might become a problem if the celebrity is then involved in a scandal. There is a lot of pressure on *tarento* to always appear innocent and pure, so it’s very easy to fall into a scandal, since their range of action is more limited than that of a normal person.

Nonetheless, celebrities are certainly a very important part of Japanese advertisement. From the interviews I have conducted, it seems that it would be very unlikely for a Japanese commercial to have unknown people as the main protagonists and one of the interviewees said that it’s quite common for people to follow and talk about commercials and that is because of the celebrities that appear in it. A topic of conversation can be, in fact, that a certain company changed their representative from one celebrity to another. Furthermore, some people seem to enjoy watching commercials because a certain idol they support appears in them, and this also makes people support the firm itself.

“I don’t watch a lot of real-time TV, so I don’t know commercials well, but my friends actually do. A subject of conversation is often the appearance of certain celebrities in commercials or the change of actors (...) I feel like a lot of Japanese people are intently watching commercials and it might be because of the celebrities that appear on them because they like them and they like talking about them. (...) I also think that celebrities are very influential in Japan, compared to other countries, so if a Japanese person sees a celebrity wearing or using a certain product, they will want to buy it too. I, too, buy products if they’re collaborating with my favorite idols. So, I think it’s a very strong strategy.”

From the interview, it came out that celebrities’ influence is so great that they can affect the sales of a product, with the idea that, if a product is sold by two companies, which both offer a high level of quality, the consumer will choose the one that collaborates with their favorite idols.

So, celebrities have always been a very important part of a company’s strategy in Japan, as they can even influence the sales of the product and can represent an added value to the brand.

6.5 Social media in Japan

Social media is an essential tool in today's marketing: not only does it give more opportunities to gain visibility for a firm's product, but it also makes communication with consumers easier, establishing a two-way conversation, where customers can express their honest opinions on the product. According to the key insights of the Japanese market for 2022 by Jim Kersey¹³⁵, one of the consequences of the Covid-2019 pandemic is an increase of social media usage, so especially now, it is necessary for a company to have its own social media accounts. The social media platforms will have to be chosen depending on the business's goals, intentions and on their target.

According to [Data Reportal](#), the most used social media platforms in the world are, in this order, Facebook, YouTube, WhatsApp and Instagram. On the other hand, the list is different for Japan in the specific: the top used platforms are YouTube, LINE, Twitter and Instagram, with Facebook placing fifth.

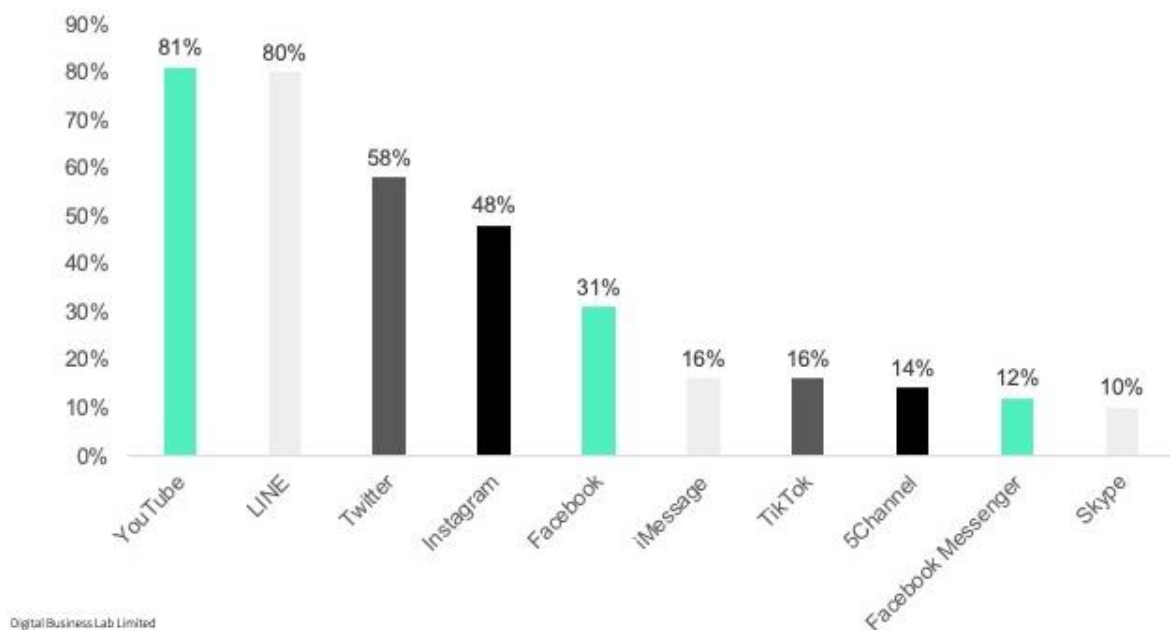


Figure 70 - Social media platforms use in Japan from [Digital Business](#)

Since, as shown in Figure 70, 81% of the population uses YouTube, the potential reach of ads on this platform is 102 million, so it's a tool that shouldn't be ignored. Companies should take account of the growing popularity of vlogs and maybe consider making collaborations with famous YouTubers. In this regard, we have seen that Nestlé has its YouTube channel where videos on their various brands are uploaded. They use them to give more insight on how they work, their ethical

¹³⁵ Jim Kersey. "Japan Market Analysis – Key Insights for 2022". HumbleBunny. September 6, 2022. <https://www.humblebunny.com/japan-market-analysis-key-insights-2022/>.

values, the manufacturing process, to upload some short movies to advertise some products, and many more videos.

LINE is the most popular messaging app in Japan and offers many features, making it so that “Brands are recommended to leverage the platforms’ wide variety of unique ads placement to reach their desired audiences in the Japanese market”¹³⁶. One of the interviewees stated that LINE is the social media platform that she uses the most. When I asked her how she knows that some special edition flavors of products are being sold, such as special edition Frappuccinos from Starbucks or special meals from McDonald’s, she said that she often knows from checking the “News” section on LINE. The chatting app, in fact, is not only used for messaging and calling, but the interviewee also said that she uses it to check the most trending news as well. It is thus a tool that should be considered when advertising a product.

Twitter stood in the 14th position in the global list of most used social media platforms, while in Japan it’s much more popular, on the third position. When it comes to Twitter users in the world, in fact, Japan is second only to the United States. This popularity can be explained by the fact that Twitter protects people’s privacy more: many users seem to prefer writing their opinion in anonymous form through anonymous accounts. One of the people I interviewed added that Twitter is also used by people to keep up with what’s trending:

“Twitter has the trending section, so compared to Instagram it’s easier to keep up with news and such, so there’s a lot of people who get information from there.”

According to Digital Business Lab, many Japanese people go specifically to Twitter when they want to read honest opinions regarding a product, so Twitter is certainly a very important tool of communication, where honest feedback can be obtained. Digital Business Lab concludes that “Brands are recommended to leverage Twitter as a channel to communicate with the Japanese audience as the core of customer service”.

According to Digital Business Lab, Instagram would be a very effective means of communicating to Generation Z consumers, with stories and reels being fundamental. KitKat, for example, aside from uploading pictures with quizzes on the flavors of the chocolate bar, also creates short videos about new KitKats or to celebrate certain events and posts them in their stories as well.

Facebook in Japan is not as popular as it is in the world, but it’s still one of the top social media platforms. With a big percentage of users who are over 40, Facebook users are older than the other

¹³⁶ Digital Business Lab. “Social Media Penetration in Japan”. October 3, 2022. <https://digital-business-lab.com/2022/10/%E2%91%A1-social-media-penetration-in-japan-research/#:~:text=Social%20Media%20User%20Penetration%20in%20Japan&text=According%20to%20DataReportal%2C%20as%20of,4th%2C%205th%20and%206th%20place.>

platforms, but this also means that it's the social media platform where "business decision-makers" spend their time, which is very useful for interaction between firms. In fact, as Digital Business Lab states, since LinkedIn is not very popular in Japan, "80% of Japanese enterprises use Facebook—not LinkedIn—for business networking".

In summary, now social media is extremely important for advertising products, and it is important to know what kind of use is being made not only by consumers but also by possible business partners, in order to know where and how to approach them.

Conclusion: marketing food in Japan

In conclusion, what made KitKat successful in Japan was their ability to glocalize, understanding the Japanese culture, people's expectations and creating a strategy that was adapted to this context, while also not forgetting their company values. So, I would like to make some points regarding the marketing strategy that could be beneficial for a foreign firm that is considering entering the Japanese market in the food sector.

When entering a new market, it is normal for firms to feel in an unknown and risky territory, so they might not be willing to invest too much at first. A firm might first enter the market through non-equity modes, letting local experts take action and then, after gaining some experience, consider equity modes and make more substantial investments when the firm knows the market better.

The strategy of glocalization "think global, act local" is certainly needed to gain success in Japan and thorough research is necessary, as there are some elements of the Japanese culture that create certain expectations out of customers and that shape their behavior. The expectations of Japanese consumers regarding products are high, starting from the package, that is the first contact they have with the product itself. A firm entering Japan has to be ready to enter a very competitive market where firms are striving to provide the best quality products and the best service possible. The fact that the Japanese society is mostly masculine and collectivistic makes it so that it's driven by success and there's a lot of competition between firms. To shine in this competitiveness doesn't mean to bring other companies down when advertising the firm's product by making comparisons, as this is not seen very well, but rather it means investing in R&D to consistently improve the quality of the product and bring innovation, and, in the case of food, thinking of new flavors and special editions, renovating the life cycle of the product by innovating it before it dies. Limited editions are extremely important in the Japanese market, as Japanese people give much importance to the four seasons and every year come to expect some specific flavors, so the firm should always be ready to make special editions in theme with the season.

Japan has a declining and ageing population, which will naturally lead to a future decrease of the number of potential customers. This makes it so that it might be beneficial to look at foreigners coming to Japan as a part of the potential target as well. This means making the product, or some versions of it, more "Japanese", so that even if the firm is an international enterprise that sells the product worldwide, consumers coming from countries different than Japan might find the product attractive because it has some characteristic, ingredients, flavors, that can only be found in Japan, which is something that would make it a great experience to try in Japan or a good candidate for a souvenir to bring home. One way of doing this would be making *gotouchi* products, which can only

be found in specific regions of Japan. These products, in fact, make for perfect souvenirs both for Japanese people traveling inside Japan and for foreigners visiting the country. In line with this, the firm might consider making special packages that represent something that people typically associate with Japan.

This “Japaneseness” is also connected to the “Cool Japan” craze that has been part of the Japanese culture for quite some time, where the government as well is trying to highlight the peculiarities of Japan in order to heighten Japan’s soft power and influence and boost its image abroad. This means that as part of the activities to make in Japan, a company might try to promote Japan to the world through their product, by making special editions aimed at this goal.

The firm has to establish a relationship of trust with the Japanese consumer, so the interactions must sound sincere and it’s best if advertisements are relatable, interesting and entertaining. Japan has a higher amount of soft selling commercials compared to other countries, so a firm that wishes to be successful will have to make commercials that are entertaining and that create a bond with the viewers. A very important aspect of Japanese commercials is that they often use celebrities to promote their products. It might be a considerable investment, but the influence of these celebrities is so impacting that it can increase the sales of the product, or make the commercial, and thus the product, well known and talked about, especially by younger people.

Remaining on the subject of promotion, social media is a fundamental tool to create a bond with customers, with Twitter being one of the most popular, where users often leave unfiltered and honest comments on their experience with certain products and where potential customers search for other people’s feedback to decide whether they want to try the product or not. Twitter can thus be used to promote collaborations, campaigns, and such, but also to see what people actually think of the product and understand what kind of improvements need to be made or what kind of strategies worked particularly well. LINE is another popular social media platform, and even though it’s mostly an instant communication service, it also has a News section where customers see what news are trending, so a firm might consider creating an account to communicate with their customers and to create articles which will be useful to let people know of the new release of special limited edition flavors of the product. All in all, when considering the use of social media, the firm has to be conscious of the use that people do of them and of the demographic that they represent, in order to choose the right platform for the right content and vice versa.

When entering a new market, there is no one-size-fits-all strategy to be taken, depending on the product category it might be possible to sell the same product worldwide without making any modifications, but it might be necessary to change the message that the company advertises when trying to sell the product; food is generally a product that needs extensive modifications. In any case,

it is fundamental to learn and know about the local culture in order to be able to reach the customers and offer what they need and expect. Japan has a very competitive market with high expectations from the consumers and, especially when it comes to food and confectionery, a firm should be ready to make the necessary adaptations and get creative with possible new flavors in order to compete in this market.

The information gathered in this study is but a fraction of the great work that lies behind a successful strategy, but I hope it helped gaining some insight on the Japanese market.

Appendix: brands in Japan using a similar strategy

After all these considerations on the Japanese culture, the customers' preferences, the variety of flavors and limited editions, the commercials and use of social media, I would like to briefly consider other companies and see the similarities in the strategies they use to sell in Japan.

I will consider both Japanese and foreign brands that are successful in Japan: I chose Glico's Pocky for the Japanese brand because, much similarly to KitKat, Pocky are a confectionery product that is very popular in Japan. Then, even though it is not in the food industry, I chose Au to consider it as an example of successful Japanese TV commercials. For the foreign brands I chose Starbucks and McDonald's that in the food and beverage industry are the best known.

These are also all brands that came up during the interviews I made.

A. Japanese brands

a. Glico's Pocky

Pocky are biscuit sticks covered in chocolate made by Glico, a confectionery shop founded in 1922 in Osaka. The company's concept is similar to that of Nestlé, since its slogan is “おいしさと健康 (*oishisa to kenkou*)” which has been translated to English as “Good Taste and Good Health” from 1971 to 1992 and “A Wholesome Life in the Best of Taste” from 1992¹³⁷. The name Glico¹³⁸ comes from the fact that the founder, Riichi Ezaki, found out that oyster broth contains glycogen, which had helped Ezaki's son heal from the symptoms of typhus, and decided to start selling food products with glycogen incorporated in it, starting from the “Glico Caramel”, in the red box with the running man.

Glico Caramel was very successful, and the company expanded their range of products and the countries they sold to. Today, with more than 10 billion packets sold from 1966 (the year in which they were invented) Pockys are very popular and have their own day, together with PRETZ: November 11th is “Pocky & PRETZ Day”.

In Europe, the first Glico subsidiary created was in France, the General Biscuit Glico France, which in 1982 started selling Pocky in Europe under the name *Mikado*, most likely to associate it with the image of its country of origin. The word Pocky is supposed to reproduce the sound the stick makes when eaten, but when thinking of selling it abroad as a Japanese product, it doesn't hold any

¹³⁷ Wikipedia. “Ezaki Glico”. https://en.wikipedia.org/wiki/Ezaki_Glico.

¹³⁸ Glico global. “History”. <https://www.glico.com/global/about/history/>.

special connection to Japan, that's probably the reason for the different name. Today, they are produced under license by Mondelez International.

In Italy, they are only available in the original form, in the flavors of milk, white and dark chocolate, much like KitKats. However, when going to Japan it's easy to notice that the variety of flavors is much vaster in Japan, with different sizes as well. The first variations were produced starting from five years after the invention of the biscuit stick, with the almond-coated version made in 1971 and the strawberry flavor in 1977. Now, there are both seasonal flavors, which more or less follow the schedule we've seen in the "Limited Editions" section, and also *gotouchi* editions. The two seasonal flavors advertised at the moment, as of January 20th, 2023, are "Winter's luxury" flavors: chocolate Pocky covered in cocoa powder, and salted caramel with butter Pocky.

Aside from seasonal flavors, Pocky has regional flavors as well, promoted as gifts, encouraging visits to the various regions of Japan. The 8 flavors are Tokyo *amazake* for the Tokyo Prefecture, *ehime iyokan* (a citrus fruit similar to the tangerine) sold in the prefectures of the Chushikoku region, *amaou* strawberries for Kyushu (just like KitKat), *goroujima kintoki*, a kind of sweet potato, from Hokuriku, cherries from the Satonishiki shop in Yamagata sold in the Tohoku region, *yubari* melon for Hokkaido, Shinshu *kyohou*, a kind of big grapes, sold in the Shinshu area, and, finally, *uji matcha* for the Kinki region. These regional Pockys are bigger than regular Pocky (24 cm long versus the regular 16.3 cm) and are advertised as ideal presents for whoever goes on a trip in one of those regions and are specifically wrapped individually so that they're easier to share.



Figure 71 - Regional Pocky, from Pocky Japan [website](#)

The regular flavors are the original milk chocolate Pocky, in regular size or ultra-thin size, which contains 50 Pockys. Then there are more elaborated Pockys, in the flavors of whole wheat biscuit with butter and burnt milk, strawberries, where texture also comes into play with the onomatopoeia “*tsubu tsubu*” referring to the pieces of dried strawberries in the coating, and crushed almonds with “luxurious” chocolate.

There’s also a series of “luxury” Pocky, which are shorter and have a thicker coating, in the flavors of milk chocolate and almond milk.

In line with what we’ve seen about the importance of celebrities in commercials, Glico is collaborating with two very famous actresses, Kasumi Arimura and Yui Sakuma, to advertise their product. As for social media, they have Twitter, LINE, Instagram, and YouTube accounts.

b. Au: an example of TV commercials

Au is a mobile phone company, founded in the year 2000. It’s not connected to the food industry, but I still wanted to consider it specifically as an example of Japanese TV commercials done well. In fact, when talking about commercials during the interviews, the au commercials came up in both conversations, as an example of fun commercials, with characters that people grow to love and stories that don’t end with one commercial but continue and evolve.

Today, au has mainly two series of very popular commercials: the “San-taro” (“the three Taro”) series, started approximately 8 years ago, and the “Takasugi-*kun*” series, started 4 years ago.

The protagonists of the San-taro series are Momotaro, Kintaro and Urashima Taro, beloved Japanese folk tale characters, who often still make appearances or get referred to in modern TV series, *anime*, and *manga*. These three characters come from different tales, but, in the commercials, they are portrayed as friends. The commercials are set in ancient times befitting the characters, interpreted by Shota Matsuda, Gaku Hamada, and Kenta Kiritani respectively, who are all successful actors. The story kept on evolving and, after a year, new characters were introduced, Kazuyahime and Otohime, two famous princesses from Japanese folktales, interpreted by actresses Kasumi Arimura and Nanao Arai. The commercials reference the original folk tales while also introducing au promotions.

The Takasugi-*kun* series, on the other hand, is set in the modern age and the protagonists are high school students, with funny names that become part of their catchphrase: Takasugi-*kun* is “*Ishiki takasugiru Takasugi-kun*” “Takasugi who is too knowledgeable”, who is in fact very knowledgeable when it comes to every au promotion and offer. In this case as well, as time progressed new characters were included, such as “*Komakasugiruyo, Komasugi-kun*”, “Komasugi, who is way too precise” a student who is very detailed, especially when explaining au promotions. The commercials put the characters in situations that are similar to those of high school dramas and introduce au’s promotions

in a funny way. The actors involved are Ryunosuke Kamiki (interpreting Takasugi-kun), Honoka Matsumoto whose character is simply called Matsumoto and Taishi Nakagawa in the part of Komasugi-kun. The latest addition to the cast has been Nanase Nishino, a member of famous J-Pop group Nogizaka-46.

These commercials are also uploaded on Au's official YouTube channel, in the playlist "[TV commercials](#)" containing 73 videos and garnering many views from fans (their most viewed video is in fact a commercial from seven years ago, with 132 million views). There has also been a crossover of commercials, where all the characters from these two series are in the ancient age but making classroom representative elections.

I think this is an example of good promotion because the commercials are so enjoyable that people won't feel bothered to watch them, and they also use the image of famous actors so that their fans will be happy to see them in the commercial. At the same time, they also manage to use or create characters that the viewers will love, so that the commercial, and the company will be appreciated.

B. Foreign brands

a. Starbucks¹³⁹

When talking about successful foreign businesses in Japan, in the field of food and beverage, we can't not mention Starbucks. Japan was the first place Starbucks landed outside of the American continent.

Let's first briefly see Starbucks's history. The coffee shop was created in 1971 as a café that offered "fresh-roasted coffee beans, tea and spices from around the world for our customers to take home" (Starbucks website. "About us"). The concept changed after Howard Schultz entered the company in 1982 and went to Italy on a trip in 1983, where he tried Italian coffee and decided to bring those flavors, artistry, and coffee culture to the US, through Starbucks. After some tries and failures, Starbucks found their style and expanded in the American continent first and then set foot outside of their continent, with their first landing spot being Japan in 1996, thanks to a fortuitous meeting in the US between Howard Schultz and Yuji Tsumada, CEO of Sazaby League which developed the café chain Afternoon Tea.

Since Starbucks's concept was to bring good quality coffee to the American market, the quality of the coffee and the way it's made are extremely important, in fact, there's a whole page dedicated to their "Coffee & Craft"¹⁴⁰, where many stories are shared about how they make coffee and the people who make it. The baristas who prepare the coffee are especially trained. This happens not only

¹³⁹ Starbucks official website. <https://www.starbucks.com/about-us/>.

¹⁴⁰ Starbucks. "Coffee & Craft". <https://stories.starbucks.com/stories/coffee-craft/>.

in the US but in all subsidiaries because it's company policy. Much like KitKat has company values that must be respected by all employees around the world. Furthermore, they are also committed to ethical sourcing to create sustainable products: for ethical sourcing in coffee, they adhere to the Coffee and Farmer Equity Practices, launched in 2004, which is a “verification program that measures farms against economic, social and environmental criteria, all designed to promote transparent, profitable and sustainable coffee growing practices while also protecting the well-being of coffee farmers and workers, their families and their communities”¹⁴¹. This ensures support to farmers and their communities. As for cocoa, Starbucks works with the Rainforest Alliance and they're also a member of initiatives such as the Cocoa & Forest Initiative, whose goal is the end of the Ivory Coast deforestation. For tea and manufactured foods as well, Starbucks belongs to partnerships for ethical sourcing and is invested in supporting the communities as well.

The Starbucks website has different versions based on the geographic area and language: first there's the USA site, in English, then Canada available in both English and French, then Europe, Middle East and Africa are all put together, with a site in English. For Latin America there are Spanish, Portuguese and English versions. Then, there's a website dedicated to Asia, but Japan is the only country that has its own website, in Japanese.

As of November 2022, the Japanese site was advertising a special Strawberry Velvet Brownie Mocha and Frappuccino, in theme with Christmas festivities. Christmas is a time for presents, so other Christmas promotions included the “Let's be a Santa!” initiative where consumers can decide to make a donation through the “Be a Santa Donation” program or join the “みんなの (*minna no*) Love & Happiness (Let's Be a Santa) ムービー (*muubii*)”, a project made in collaboration with singer Dai Hirai. The event consisted in the creation of a video by putting together videos sent from consumers. Customers could join by making a video of an important person, time or thing and posting it on social media with the hashtag #スターバックス LoveHappiness. There was also a special Christmas edition of the roasted beans they sell, named “Christmas Blend” and they came in four versions, “Starbucks Christmas Blend” which contained ginger, custard, dry fruit, “Starbucks Christmas Blonde Roast” with citrus and berry crumble flavor, “Starbucks Christmas Blend Espresso Roast” with dark chocolate and baking spices, and “Starbucks Reserve Christmas 2022” with maple, cheese, and clove. In line with the fact that Starbucks's concept is to offer good quality coffee from

¹⁴¹ Starbucks. “C.A.F.E. Practices: Starbucks Approach to Ethically Sourcing Coffee”. <https://stories.starbucks.com/press/2020/caf-practices-starbucks-approach-to-ethically-sourcing-coffee/>.

the Italian coffee culture, they also sold typical Italian Panettone. Always in theme with Christmas, there were also Christmas themed tumblers, mugs, cups and gift sets.

After Christmas time is over, come Valentine’s Day products. As of the end of January 2023, there are Valentine’s themed gadgets, such as mugs and tumblers, and *fondant chocolat* flavored menu additions: the *fondant au chocolat* cake, a Frappuccino in the flavor of *fondant chocolat* and a mocha in the flavor of *fondant chocolat* almond milk.



Figure 72 - JIMOTO Frappuccino advertisement image, from [Starbucks Stories Japan](#)

That aside, Starbucks has also made *jimoto* Frappuccino in the year 2020, where 47 Frappuccino flavors were created, one for each prefecture in Japan. Starbucks mainly sells beverages, so the difference with products like KitKat and Pocky is that they can make *gotouchi* beverages, but they can’t advertise them as gifts to bring back for tourists. However, they have been able to overcome this by making *jimoto* gadgets, in the series “JiMOTO Made”, with mugs, cups, glasses, good luck charms and blankets, made with local materials and techniques, each available only in a specific region or prefecture.

So, Starbucks not only makes seasonal and local limited editions of their drinks, but they also make gadgets to go with the seasons and festivities, and also as souvenirs for visiting tourists.

b. McDonald’s

McDonald’s entered Japan in 1971, not that much earlier than KitKat, and it’s another company that clearly uses a glocalization strategy, as it’s possible to see that depending on the country, the ingredients, products, and their sizes change.

In Japan, they frequently offer seasonal limited editions. In fact, in both interviews I made, McDonald’s came up as an example of a food company that has seasonal products, that both interviewees said that they come to expect every year.

“McDonald’s can be divided into spring, summer, fall and winter McDonald’s, it’s very seasonal. I really like the sankaku chocopie, which comes out in the winter, December. Its normal flavor is chocolate but every year there will also be other flavors, this year it was strawberry, and they make commercials about it, the actors might change, but the song

they use is always the same, so every time I see the commercial, I think 'It's already winter' and I will go buy it. Also, there's tsukimi burger in October and korokke in December.”

Hanami is an event of which we have already spoken, in which people gather to see the cherry blossoms. However, there's also another similar event where nature is admired that might not be as known: *tsukimi*. *Tsukimi* literally means “moon-viewing”, and refers to the celebration of the full moon, an event of Chinese origins that was taken up in Japan as well in the Heian Period. It falls on the fifteenth night of the eighth month according to the traditional Japanese calendar, in September or October of the modern solar calendar. To this day, in this period many Japanese restaurants will offer special editions and menus in honor of the *tsukimi*, and McDonald's is no different, offering, for example, hamburgers with round fried eggs to resemble the roundness of the full moon.



Figure 73 - 2021 McDonald's Tsukimi menu from McDonald's Japan news article at <https://www.mcdonalds.co.jp/company/news/2021/0901b/>



Figure 74 - McDonald's "gotouchi gourmet burgers" from [Ryuutsuu News](#)

McDonald's has also made *gotouchi* products. For example, in August 2018 McDonald's launched their “gotouchi gourmet burgers”, which consisted of three hamburgers:

1. The “chicken *nanban*” (a typical dish originated in the Miyazaki prefecture) hamburger, sold all over Japan.
2. The “*miso katsu*” burger, typical of the Nagoya prefecture and sold only in Eastern Japan (in red in Figure 74).
3. The “*kuro-karee katsu*” hamburger, based on a famous dish from the Kanazawa prefecture and sold only in Western Japan, in yellow in Figure 74.

These hamburgers were only available in August of that year.

The limited edition now (January 21, 2023) is a “Samurai Mac”¹⁴², available starting from the 4th of January and advertised a commercial in an *anime* style, with drawings from Tetsuo Hara, illustrator

¹⁴² McDonald's Japan. <https://www.mcdonalds.co.jp/>.

of the *manga* “*Hokuto no Ken*” (translated in English as “Fist of the North Star”), which is one of the best-selling manga series, with over 100 million copies sold¹⁴³.

So, it’s clear that McDonald’s also takes into consideration the various trends, traditions, and local subcultures of Japan to appeal to the Japanese public and manages to be appreciated this way.

Summary

With these examples it is thus possible to say that we have confirmed some of the observations made throughout this thesis:

- Brands in Japan give as much importance to natural events as the Japanese customers do: they will follow seasonal schedules to cater to the expectations of the Japanese consumers, offering some specific flavors every year in specific periods.
- Not only that, but they also give importance to the habit of giving gifts by creating products and gadgets that will be available in specific regions of Japan, promoting the territory with collaborations with local activities at the same time.
- To promote their products and projects they can use the image of famous celebrities that have a following of their own and create entertaining commercials with interesting characters and a story that evolves through time.
- Also, they can rely on traditional or pop culture to reach the hearts of the viewers with characters that the public has known and loved for a long time.

The food industry is one that requires adaptation to the country the firm operates in, so it’s important that companies entering Japan pay attention to these trends and act accordingly.

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Irene