Chapter 3.14

Foreseeing the Future Lifestyle with Digital Music:
A Comparative Study Between Mobile Phone Ring Tones and Hard–Disk Music Players Like iPod

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ABSTRACT

This chapter aims to explore the future trajectory of enjoying digital music entertainment among consumers comparing the characteristics of the usage patterns of digital music appliances in the U.S. and those in Japan. As the first step of this research, the author conducted two empirical surveys in the U.S. and Japan, and found some basic differences in the usage patterns of a variety of digital music appliances. Next, a series of ethnographical research based on focus-group interviews with Japanese young women was done and some interesting reasons of the differences were discovered. In Japan, sharing the experiences of listening to the latest hit songs with friends by playing them with mobile phones that have the high quality, ring tone functions can be a new way of enjoying music contents, while hard-disk music players like iPod have become a de facto standard of the digital music appliances in the world.

INTRODUCTION: CENTRAL QUESTIONS

The November 2001 debut of iPod and the subsequent opening of iTunes Music Store have brought a rapid expansion of the digital music market around the world. Some estimate that the market will be worth $1.7 billion dollars by 2009 (Jupiter Research). Now, iTunes Music Store service is available in 30 countries around the world, with the total number of downloaded songs surpassing the 500 million mark in July 2005.

The store only opened in Japan in August 2005 and sold over 1 million songs in the first 4 days. This is an astonishing achievement, consider-

ing that Japan's largest online music store Mora has monthly sales of around 450,000 songs. In March and April 2005, SONY, which has long led the portable music player market, released a new digital music player under the Walkman brand, offering both the hard disk type and USB flash memory type to launch a marketing drive against iPod. The developments have finally begun to provide Japanese music lovers with an environment whereby digital music contents are broadly enjoyed in terms of both services and hardware devices.

One of the major characteristics of Japan's digital music market has been the presence of digital music contents for use on mobile phones. The use of digital music contents on mobile phones, which started as regular ring tones, has gradually evolved into Chaku-uta® (true-tone ring tones) by December 2002, and to Chaku-uta Full™ (mobile-phone-based music distribution service launched in December 2004 by the mobile carrier "au"). Chaku-uta® and Chaku-uta Full™ have sold over 100 million songs and 10 million songs respectively, making the digital music service the largest segment in mobile-phone content services.

The environment for enjoying digital music content is set to expand even further into the future. How would such a development affect the way Japanese music fans listen to music in general? This paper examines future ways of enjoying digital music content in Japan, and the competition between music players like iPod for use with personal computers and mobile phones that have adopted the usage as music players.

JAPAN'S DIGITAL MUSIC CONTENT MARKET AND THE PROLIFERATION OF MOBILE PHONES BEFORE 2005

Firstly, let us examine past developments of the digital music content market in Japan. Japan's first

digital music distribution service started in April 1997. A company called MUSIC.CO.JP began offering songs mainly from independent labels. Coinciding with the launch of numerous music download services in the U.S., a number of online music Web sites opened one after another, orchestrated by individual artists and record labels. In December 1999, SONY Music Entertainment became the first major record company to start an online music store bitmusic. Toshiba EMI, Avex Records, and other major companies followed suit. Yet, since early 2005, the system for online distribution of digital music contents has been underdeveloped, as can be seen in the fact that Mora's supposed largest online music catalog in Japan contained just 100,000 songs, as opposed to iTunes Music Store's lineup of 1 million songs upon its launch in August in Japan.

There is no denying that mobile-phone-related music services have been the driving force of the nation's digital music market. The launch of the i-mode service by NTT DoCoMo in February 1999 marked the start of digital content downloading services via mobile phones. The connection speed of 9600bps in those days made it, initially, difficult to distribute songs in high audio quality. Faced with the adversity, businesses began offering Chaku-melo music ring tones, instead of distributing actual music contents, achieving dramatic growth. The Chaku-melo market has rapidly expanded to 80-90 billion yen in 2002. What makes this development unique was the fact that this service was initiated not by record companies rather by major online Karaoke service providers like GIGA and XING, computer game companies like SEGA, and other companies operating in the peripheral areas of the music industry itself. The market size of 80-90 billion yen as of 2002 is among the highest of all mobile-related digital content services, proving the market-led proliferation of digital content services for mobile phones.

Amidst the flourishing success of the Chaku-melo market, supported by peripheral music

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