Retail Format Innovation and Survival of Small Stores: Evidence from the Japanese Shoe Trade, 1974–2022

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This study discusses how a group of small and medium-sized shoe retailers in Japan survived in the late 20th and early 21st centuries. Modern retail history research regards small and medium-sized retailers as non-innovative, because historians observed them at a macro level, focusing on their closeness to the local community in Japan and Western countries. This study suggests that, by taking those perspectives, researchers might have overlooked the existence of innovative small and medium-sized retailers. This study uses micro-level and non-local community perspectives. By subdividing small and medium-sized shoe retailers based on retail format using a combination of written and oral sources, this study shows that a group of small and medium-sized shoe retailers survived through innovative retail format to meet universal needs beyond the community, which large retailers failed to meet.

小売業態革新と小規模店の存続：日本の靴産業の分析（1974–2022）

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現代小売業史研究は、中小小売商をマクロ視点から観察してきたこと、生き残り策として地域社会との密着性に着目してきたことに特徴がある。しかしそれ故、中小小売商を非革新的存在として捉えてきた。本研究では 20 世紀後半の日本の中小靴小売商を、業態ごとに細分化して観察する。地域を超えた普遍的ニーズに対応する革新的な小売業態を採用することで、一部の中小靴小売商が存続してきたことを明らかにする。

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1. Introduction

This study discusses how a group of small and medium-sized shoe retailers in Japan survived in the late 20th and early 21st centuries, despite the overall decline of small and medium-sized shoe retailers amid competition from large shoe retailers. Although large shoe discounters thrived along suburban main roads from the 1980s, a group of small and medium-sized shoe retailers successfully differentiated themselves by adopting a new retail format, shoe adjuster retailing (SA retailing), and survived.

This study fills a gap in research on modern retail history. While considerable research has been done on large retailers in Western countries, less work has been done on small and medium-sized retailers (Berghoff, 2006; Cochoy, 2010; Deutsch, 2010; Logemann, 2013; Monod, 1996). In addition to insufficient archives, the view that small and medium-sized retailers were non-innovative by refusing or failing to modernize, has inhibited research (Berghoff, 2006; Spellman, 2016). In Japan, where supermarkets developed after WWII, the perception of small and medium-sized retailers of the period as non-innovative has also prevailed (Kitayama, 2005; Deie, 1995).

Underlying the view of small and medium-sized retailers as non-innovative, there are two perspectives of previous studies: the macro and the locality perspectives. First, they may seem non-innovative at the macro level because they declined in Western countries and Japan. In recent years, however, close micro-level observations suggest that some small and medium-sized retailers took progressive initiatives (Cochoy, 2010) and, based on these initiatives, modern retailing developed in the 19th and early 20th centuries in the U.S. (Spellman, 2016). Second, historians have attributed small and medium-sized retailers' attentive response to local economic and social needs as a reason for their survival despite economic inefficiencies. Alexander and Phillips (2006) pointed out that in the 1930s and 1940s in Britain, independent retailers were legitimized by their social role in the community, which has continued (Baron et al., 2001). French (2008) found this legitimization of independent grocers against large chains in Scotland from 1915 to 1965. In Japan, studies have emphasized the economic and social function of small and medium-sized retailers in their local communities in the late 20th century (Kiyonari, 1983; Minakata, 2005; Yasuda, 1988).

When discussing small and medium-sized retailers from the macro level and the locality perspective, they may seem non-innovative. However, this study subdivides small and medium-sized shoe retailers based on retail format and shows that a group of small and medium-sized shoe retailers survived through innovative retail format to meet the universal needs beyond the community, which large retailers failed to meet. Thought the number of those shoe retailers are limited, the history of them helps clarify the bias of previous research and suggests one way to research innovative small and medium-sized retailers.

The remainder of this paper comprises five sections. The next section reviews the literature of small and medium-sized retailers in Japan, pointing out that small and medium-sized retailers has been regarded as non-innovative. The third section explains the methods and data used in this study. The forth section examines the survival rate of SA retailers and confirms that their survival was attributed to the retailing format, rather than other factors. The fifth section illustrates how SA retailing emerged and developed. The final section summarizes the study findings and discusses its contributions.

2. Distribution Policy in Postwar Japan and Views on Small and Medium-sized Retailers

Many studies on small and medium-sized retailers have been conducted in relation to distribution policies in postwar Japan to coordinate activities between small and large retailers in Japan (Kitayama, 2005). Therefore, the first subsection briefly reviews distribution policies to coordinate activities between small and large retailers and their impact on the retail industry, followed by a subsection on the views on small and medium-sized retailers.

2.1 Distribution Policy

Supermarkets surged during the 1960s. They identified themselves as 'self-service discount department stores' because they sold a variety of products such as groceries, household commodities, and daily clothing at lower prices and adopted chain operation (Fujioka, 2017; Harada, 2018; Tatsuki, 1995). They opened stores in existing shopping streets in town to meet the demand for daily necessities. Therefore, they greatly threatened small and medium-sized retailers competing with supermarkets in terms of assortment and location (Kawano, 2009; Minakata, 2005; Tamura, 2011; Tsūshō sangyōshō Sangyō seisakukyoku and Chūshōkiygōchō, 1984). The Department Store Law established in 1956 was the law restricting the activities of large retailers, but it failed to regulate supermarkets. Therefore, the Large-Scale Retail Store Law (LSRS Law) was enacted in 1974, adding supermarkets as a regulatory target with the repeal of the Department Store Law (Ishihara, 2009a; Tsūshō sangyōshō Sangyō seisakukyoku Shōseika, 1976).[2]

According to the LSRS Law, stores larger than 1,500 m² or 3,000 m² as designated by government ordinance were subject to regulation, with the following items subject to adjustment: opening date, store floor space, closing time, and the number of days closed per year. Unlike the Department Store Law's permit system, the LSRS Law adopted a notification system. Although the law stipulated a procedure for making adjustments when the Minister of International Trade and Industry determined that new store openings would significantly affect surrounding small and medium-sized retailers (Tsūshō sangyōshō Sangyō seisakukyoku Shōseika, 1976), the Commercial Activities Adjustments Board established in local chambers of commerce or associations of commerce and industry handled the substantive coordination. They prepared coordination drafts, although this process was not explicitly stated in the LSRS Law (Kawano, 2009). This ambiguity allowed the LSRS Law to operate like the permit system (Hayashi, 2010; Kawano, 2009).

Although the LSRS Law did not immediately dampen supermarkets' eagerness to open new stores, new store locations changed from traditional shopping streets in town to newly developed residential areas in the suburbs (Kawano, 2009; Minakata, 2005; Tsūshō sangyōshō Sangyō seisakukyoku Daikibotenpochōseikan, 1983). In addition to motorization, the hassle of coordination with local communities under the LSRS Law prompted this move (Kawano, 2009; Minakata, 2005). Simultaneously, supermarkets started to create shopping centers (SCs) by serving as the anchor and gathering specialty stores and restaurants and opened SCs in the suburbs in the end of the 1960s (Minakata, 2013; Tamura, 2011; Yahagi, 2004).

As the economy slowed down due to the 1973 oil shock, disputes by small and medium-sized retailers against the opening of supermarkets intensified throughout Japan. Coordination procedures to open a new store took longer, and some local governments started to regulate smaller stores than those regulated by the LSRS Law (Hayashi, 2010; Kawano, 2009; Tsūshō sangyōshō Sangyō seisakukyoku Daikibotenpochōseikan, 1983; Tsūshō sangyōshō Shōseika, 1989). Thus, the LSRS Law was amended in 1989. The main changes were a store size

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[2] For a detailed history of distribution policy in postwar Japan, see Keizaisangyō Kenkyūjo (Research Institute of Economy, Trade and Industry) Tsūshōsangyōseisakushi hensan iinkai and Ishihara (2011).

standard reduction to 500 m² and that stores 500–1500 m² were placed under the control of prefectural governors while stores of 1500 m² or more remained under the Minister of International Trade and Industry. The Commercial Activities Adjustments Board moved from the notification level to the ministerial ordinance level.

The tightening of the LSRS Law worked more to encourage than quell store opening disputes between supermarkets and small and medium-sized retailers. Substantial time and effort were devoted to complicated informal coordination, such as prior coordination of supermarkets with the Commercial Activities Adjustments Board before formal procedures were initiated (Hayashi, 2010; Kawano, 2009; Tamura, 1981). Some local governments issued declarations of a freeze on the opening of large-scale stores. By the end of the 1970s, large store openings had become a political issue, and the Diet members supported by small and medium-sized retailers insisted on the permit system (Ishihara, 2009b). In response, the Minister of International Trade and Industry announced a 2-year policy of curbing the opening of large-scale stores from February 1982.

This new policy slowed the pace of supermarket store openings, and among the limited number of other store openings, new SCs were located in the suburbs (Hosono, 2000; Minakata, 2005). As the pace of store openings slowed, supermarkets pushed to diversify (Hosono, 2000; Minakata, 2013; Tamura, 1996). Convenience stores were a typical and successful new retail format developed by supermarkets; these are open 24 hours a day and stocked with approximately 3,000 daily necessities in approximately 100 m² of space (Dawson & Larke, 2004; Kawabe, 1994; Meyer-Ohle, 2003; Minakata, 2013; Takaoka, 1999; Tsūshō sangyōshō Shōseika, 1989).

The business community began to point out the unclear and cumbersome operation that deviated unduly from the LSRS Law as a problem (Kawano, 2009; Tsūshō sangyōshō Shōseika. 1989). Furthermore, the U.S., which had a trade deficit with Japan, proposed Japan–U.S. structural consultations in 1989 to promote exports to Japan. The U.S. regarded the LSRS Law as a structural impediment to the distribution of imported goods, as it considered large stores to be a promising distribution channel (Suzuki, 1992). The LSRS Law was relaxed during the 1990s, and the number of supermarket openings increased significantly in the suburbs (Minakata, 2005, 2013).

The LSRS Law was abolished in 2000, and the focus of distribution policy became town planning with the Three Laws: the City Planning Act, the City Center

Revitalization Act, and the Large-Scale Retail Location Law. Behind this shift was the hollowing out of traditional shopping streets in towns (Matsuura & Sugano, 2009; Tsūshō sangyōshō Sangyō seisakukyoku Ryūtsūsangyōka, 1998; Tsūshōsangyōshō Sangyōseisakukyoku and Chūshōkigyōchō, 1995). In addition to SCs developed by supermarkets, large specialty discount stores grew in the 1990s in the suburbs, and public facilities, such as hospitals, schools, and government buildings, also moved to the suburbs. As a result, the impact of large stores on the living environment and town development drew attention.

Despite the LSRS Law, small and medium-sized retailers eventually declined (Hayashi, 2010; Minakata, 2005, 2013). The number of stores with less than five employees peaked in 1982 at 1,721,465, then decreased to 87% of this figure in 1991 (Tsūshō sangyōshō, 1984, 1992). The relaxation of the LSRS Law combined with the recession that began during the 1990s accelerated the decline in the number of small retailers to 62% of the total retailers in 1982 by 2002 and 34% of the total retailers by 2016 (Keizaisangyōshō, 2003, 2019). After the distribution policy change in 2000 to community development, the decline of shopping districts has not stopped (Hayashi, 2010; Minakata, 2005, 2013).

2.2 Views on Small and Medium-sized Retailers

Previous studies on small and medium-sized retailers have often discussed them in relation to distribution policies. Although the protection of small and medium-sized retailers by the LSRS Law has been controversial, many researchers shared the view that small and medium-sized retailers were non-innovative with no potential for growth (Deie, 1995; Kitayama, 2005). Opponents of the Law criticized protecting economically inefficient small and medium-sized retailers (Tamura, 1981, 1996). Proponents stated that protection by the Law is necessary because small and medium-sized retailers played an important role in their community regardless of their economic inferiority (Sakamoto, 2004; Yasuda, 1988). Those studies have discussed small and medium retailers from the macro level.

Proponents of small and medium-sized retailers discuss them in relation to the community. The Industrial Policy Bureau of the Ministry of International Trade and Industry and the Small and Medium Enterprise Agency in the 1980s set forth the social function of commerce in their *80nendai no ryūtsū sangyō vision* (Distribution industry vision for the 1980s) (1984), prior to the Three Laws of town planning around 2000.[3] Since then, small and medium-sized retailers have been

[3] The City Planning Act, the City Center Revitalization Act, and the Large-Scale Retail Location

perceived as key players in revitalizing the local community (Abe, 1995; Ishihara & Ishii, 1992; Kiyonari & Yahagi, 1991; Tanaka, 1995). While large chains only offer standardized services because of their pursuit of efficiency, small and medium-sized retailers are attentively able to satisfy the needs of local communities. Therefore, small and medium-sized retailers should be protected (Sakamoto, 2004; Yasuda, 1988). Their path to survival lies in closeness to the local community (Ikeda, 1990; Kiyonari, 1983; Minakata, 2005).

Regardless of the LSRS Law and the Three Laws of town planning, small and medium-sized retailers and shopping streets faded (Hayashi, 2010; Minakata, 2005, 2013; Tamura, 2000). Although there were generous subsidy programs for shopping streets, the number of shopping streets willing to utilize these programs declined significantly (Minakata, 2013), supporting the view that they were non-innovative. Because of their non-innovativeness, the strategy of contributing to local needs might have been implemented poorly albeit conceptually correct (Kawakita, 1991).

Viewing small and medium-sized retailers as non-innovative from the macro and locality perspectives is one approach. However, this study points out that, by adopting those perspectives, the literature might have overlooked other aspects of small and medium-sized retailers. This study uses micro-level and non-local community perspectives and shows that some small and medium-sized retailers were innovative and survived by meeting needs that were not community specific but that large retailers failed to meet, even attracting people from outside the community. They survived although the shopping street in which they were located declined. Though the historical case study conducted in this research employs a single case study, it helps reveal the bias in the existing research.

3. Methods

To highlight how small and medium-sized shoe retailers advanced their retail format from traditional to SA retailing, and survived in the late 20th century, this study observed small and medium-sized shoe retailers by subdividing them according to retail format: traditional, shoe fitter (SF), and SA retailing. Emerging during the mid-1980s, SF retailing supplies comfort shoes, which are good for foot health, where 'shoe fitters' measure customers' feet to help them select shoes that fit well (Miura, 2019, 2021a). A 'shoe fitter' obtains a private qualification through

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Law.

training and accreditation from the Japan Institute of Footwear (JIF).[4] SA retailing, which appeared during the 1990s, offers German and other European health shoes, and provides shoe- and insole-adjustment services, in addition to SF retailers' foot measurement and selection services (Kuze, 1999; Makiya, 1997; Shimizu, 1995). SA retailers positioned European health shoes as having higher functionality and better quality than comfort shoes because comfort shoes were produced by Japanese shoe manufacturers inspired by European health shoes. European health shoes have sufficient space to insert customized foot insoles, and SA retailers offered insole adjustment services.

To avoid retrospective bias that focuses only on viable retailers, SA and SF retailer survival was determined by fixing the base year and checking whether both SA and SF retailers of the base year still existed in January 2022. The base year was 2004, when 30 SA retailers were recognized by nurses at Kyoto University Hospital Kango Jissen Kaihatsu Center as 'retailers that you can consult about your foot problems' in a medical book (2004, p. 130).[5] For the SF retailing analysis, 382 SF retailers in the 2005 Shoe Fitter List closest to 2004 were included (Foot, Footwear and Health Association, 2005). To check the survival of those retailers in January 2022, the study used i-Townpage, the online version of the Japanese yellow pages (https://itp.ne.jp/), and, as supplementary resources, each retailer's website and Google Maps (https://www.google.co.jp/maps/?hl=ja).

To compare the survival rate of SA and SF retailers and traditional small and medium-sized retailers, the overall shoe stores' survival rate was also calculated using official statistics, the number of shoe stores in 2004 from Shōgyō tōkei [Commercial statistics] (Keizaisangyōshō, 2006), and their number in 2016 from the most recent year available of the Keizai census [Economic census] (Keizaisangyōshō, 2019). The official statistics include all stores without distinction between traditional, SF, and SA retailers and stores of large shoe chains. If the survival rate of SF and SA retailers is higher than that of the overall shoe stores, it would imply that SF and SA retailers have a higher survival rate than traditional small and medium-sized shoe retailers, assuming large shoe chains' stores have a higher survival rate than traditional small and medium retailers.

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[4] The JIF was founded in 1965, as the Japan Institute of Women's Footwear (IWF). It expanded its scope to include men's shoes and changed its name to the JIF in 1969. It was renamed the Foot, Footwear and Health Association (FHA) in 1997 and became a general incorporated association in 2009. To avoid confusion, this paper consistently uses 'JIF' to refer to the organization.

[5] Translated from Japanese by the author.

To increase the validity of the explanation that the difference in each retailer group's survival rate is attributable to its retail format differences, specifically the quality of shoe fitting services offered, alternative explanations were considered, such as shoes offered, retailer size, and store location.

To illustrate the history of SA retailing development and survival, this study used various sources. I triangulated these sources to eliminate bias and corroborated accounts by comparing the sources to each other (Kipping et al., 2014; Yates, 2014). Among the diverse sources used, including newspapers, magazines, and books related to the shoe industry, *Footwear Press*, a monthly trade publication for the shoe industry, consistently covers the majority of the analysis period. I obtained and reviewed all issues of *Footwear Press* from 1984 to 2010, identified and copied important articles, and created a summary list. Over a period spanning 2017 to 2021, I also conducted semi-structured interviews with 18 individuals from 15 SA retailers (27 hours in total) and with a master orthopedic shoemaker who trained SA retailers (1.5 hours).[6] Master orthopedic shoemaker is a medical-technical trade in Germany and German-speaking countries. Although a list of questions based on published sources was shown to the interviewees in advance, they freely discussed the history of their stores and jobs. All interview data were transcribed.

4. SA Retailer Survival

4.1 Survival Rate

In terms of survival, SF retailers were successful, whereas SA retailers were highly successful. As Table 1 shows, from 2004 to 2022, SA retailers had a 90% survival rate, while SF retailers had a 75% survival rate from 2005 to 2022. Both rates were higher than the 65% survival rate for shoe stores overall from 2004 to 2016. Extant research has pointed out that small retailers often continue to operate even if they are not profitable, and the lack of future prospects makes it difficult for them to find successors (Suzuki, 1992; Tamura, 1996, 2008). However, this was not the case for SA retailers. As Table 2 shows, at least 16 of 30 retailers secured a successor who had already participated in management or had taken over a company, indicating that those retailers were sufficiently profitable for the next generation to join rather than select another occupation.

[6] The Ethics Review Board of Showa Women's University approved the study (Approval No. 22-25).

Table 1. Shoe Retailer Survival Rates

	SA retailers		SF retailers		All shoe stores	
Year	2004	2022	2005	2022	2004	2016
Number of stores	30[a]	27	382[b]	287	13,526[c]	8,765[d]
Survival rate (%)		90		75		65

Sources: a. Kyoto University Hospital Kango Jissen Kaihatsu Center (2004, pp. 130–135); b. Foot, Footwear and Health Association (2005); c. Keizaisangyōshō (2006); d. Keizaisangyōshō (2019).
Note: SA and SF retailers' survival was confirmed in February 2022 by using i-Townpage (https://itp.ne.jp/) and secondarily, each retailer's website and Google Maps (https://www.google.co.jp/maps/?hl=ja).

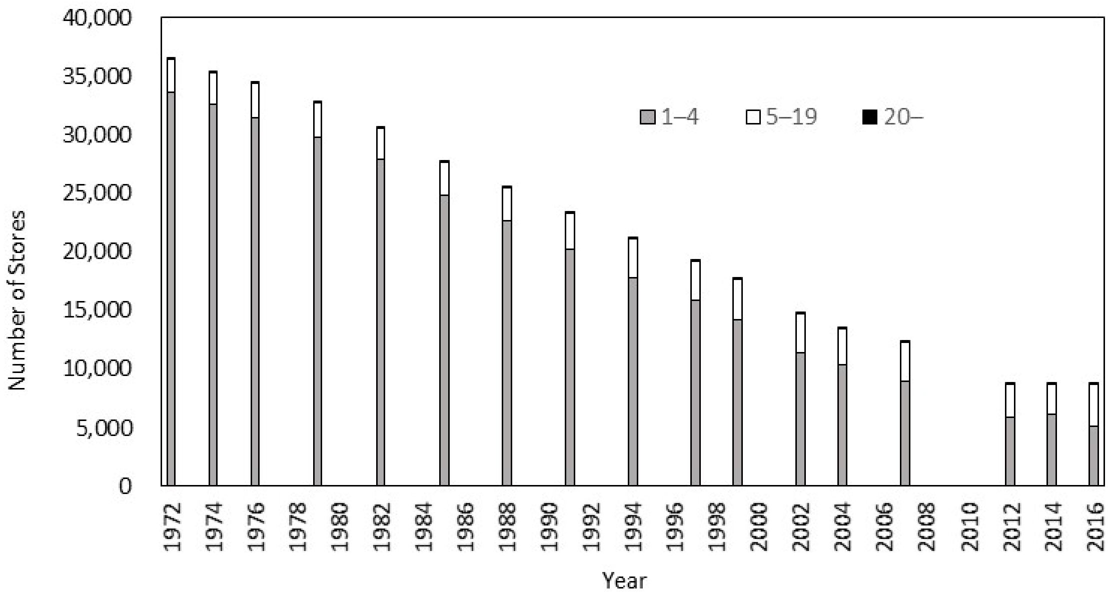
SA retailers have survived, even though the number of small and medium-sized shoe stores declined despite the LSRS Law, as shown in Figure 1. The number of shoe stores with fewer than five employees was already decreasing during the 1970s as supermarkets offered daily footwear (Tamura, 2008), and continued to decline in the 1980s as discount shoe chains flourished. Although the number of stores with 5–19 employees remained stable, discount shoe chains replaced independent retailers in this segment. Discount shoe stores are large but run by a limited number of employees, as they adopt self-service to reduce costs. Approximately 10 employees consisting of 2 or 3 full-time and several part-time employees operate the stores (Funabashi 2012, p. 66; Tominaga, 1995, p. 199). The number of stores that had 5–19 employees was 2,971 in 1991, with the number of discount shoe stores reaching 1,789 in 1992, accounting for 60% of the segment of stores with 5–19 employees (Sugawara, 1992, p. 42).

Table 2. Shoe Adjuster (SA) Retailers

No.	SA Retailer[a] Name	SA Retailer[a] Location	Survival in 2022 (Year closed)[b]	Successor[c]	Exposure: National Newspaper[d]	Exposure: Lecture[e]	Retail Centrality in 2004[f]
1	Alpha Miki	Chuo-ku, Sapporo, Hokkaido	1		1	1	7.7
2	Grace	Hachinohe, Aomori	1	1	0	1	1.4
3	Wohlsein	Yamagata, Yamagata	1		1		2.1
4	La Moustache	Shiogama, Miyagi	1		1	1	0.6
5	Catch Ball	Hitachinaka, Ibaraki	1	1	1		1.0
6	Hoshino Seika	Omama, Gunma	0 (Unknown)	-	0		1.4
7	Schöne	Kuki, Saitama	1	1	1		1.0
8	Shoe Fit Sekine	Siki, Saitama	1	1	1	1	0.6
9	Danī Shoes	Yotsukaido, Chiba	1		0		0.6
10	Gluch	Koto-ku, Tokyo	1	1	1		0.7
11	Shoes Shimura	Setagaya-ku, Tokyo	1	1	1		0.1
12	Kurantsu	Nakano-ku, Tokyo	0 (2019)	-	0		0.2
13	Alka	Toshima-ku, Tokyo	1		1	1	0.6
14	Shoe Shop Iwasaki	Katsushika-ku, Tokyo	1		0		0.1
15	Ortho Fits	Musashino, Tokyo	1	1	1		0.2
16	Profit Iijima	Naka-ku, Yokohama, Kanagawa	1	1	1		2.6
17	Wakamatsu Kutsuten	Yokosuka, Kanagawa	1	1	1		0.6
18	Nosaka Kutsuten	Kanazawa, Ishikawa	1	1	1		1.8
19	Kutsu no Asahiya	Nagano, Nagano	1	1	1		1.9
20	Alkomeister	Nakamura-ku, Nagoya, Aichi	1		1		9.6
21	Foot and Shoe Science Institute	Naka-ku, Nagoya, Aichi	1	1	1	1	21.1
22	Foot Balance	Anjo, Aichi	1		1		0.6
23	Comfort Shoes Frau	Chukyo-ku, Kyoto, Kyoto	1		1	1	2.8
24	Foot Create	Shimokyo-ku, Kyoto, Kyoto	1		1	1	8.7
25	Room-9 Nishiyama Kutsu Kenkyūjo	Ikeda, Osaka	1	1	1		0.2
26	Monet Teramoto	Chukyo-ku, Osaka, Osaka	1	1	0		43.4
27	Matsuya	Wakayama, Wakayama	1		0		1.3
28	Spross Mikki Dō	Mihara, Hiroshima	0 (Unknown)	-	0		0.5
29	Nakamura	Fukuyama, Hiroshima	1	1	0		0.8
30	Maki no Kutsu	Naha, Okinawa	1	1	1	1	1.5

Sources: a. Kyoto University Hospital Kango Jissen Kaihatsu Center (2004, pp.130–131); Miura (2021c).
b. i-Townpage (https://itp.ne.jp/) and secondarily, each retailer's website and Google Maps (https://www.google.co.jp/maps/?hl=ja).
c. 94 articles were identified on SA retailers through a search of the newspaper databases, *Nikkei* Telecom, Kikuzo II Visual, Maisaku, and *Yomiuri* Database Service, using retailer name and owner name as keywords separately; Interview transcripts of 18 individuals from 15 SA retailers.
d. The same newspaper articles as source c.
e. The same newspaper articles and interview transcripts as source c.
Note: f. Retail Centrality = Commercial Population/Residential Population. Commercial and residential population were obtained from Keizaisangyōshō (2006)

Figure 1. Number of Shoe Stores



Source: Keizaisangyōshō (2003, 2006, 2008, 2014, 2015, 2019), Tsūshōasngyōshō (1976, 1977, 1978, 1982, 1984, 1987, 1989, 1992, 1995, 1998, 2000).
Note: Department stores and GMSs that sell shoes are excluded.

4.2 Mechanisms of Survival

The fact that 30 SA retailers were recognized by medical professionals in 2004 (Kyoto University Hospital Kango Jissen Kaihatsu Center, 2004) indicates that their shoe- and insole adjustment fitting services were reliable enough. Due to their high-quality services, these retailers achieved national and regional prominence. As Table 2 shows, 18 of the 30 retailers were featured at least once in each of the four major national newspapers, *Yomiuri Shimbun*, *Asahi Shimbun*, *Mainichi Shimbun*, and *Nihon Keizai Shimbun*, between 1995 and 2015. According to Shōichi Shimizu, owner of the Foot and Shoe Science Institute (No. 21), the response to even a single appearance in a national newspaper was significant.[7] As these retailers were nationally prominent, they also gained local exposure. They provided expert lectures on shoes and foot health at institutions, such as local schools, hospitals, and community centers (Table 2). This national and regional

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[7] *Mainichi Shimbun* reported the same point. Because it also received a huge response to an article on the shoe selection process in Alka on March 1, 2000 ('Kurashi,' 2000), *Mainichi Shimbun* posted the supplementary comments of Kuze, owner of Alka, on March 9, 2000 ('Kōsaten,' 2000).

exposure attracted customers seeking consultations regarding their foot problems from outside and inside their local regions.[8] Moreover, once customers visited these stores, many returned because they found the adjusted shoes with adjusted insoles comfortable.[9] They also brought in new customers by word of mouth.[10] Thus, SA retailers continue to survive today because of their services, although other shoe retailers have closed down in their town. Both Takayuki Igari, former owner of Catch Ball (No. 5), and Sumiko Tanaka, former owner of Schöne (No. 7), stated that all other shoe retailers on their shopping streets had closed over the past 30 years and that they would have closed as well without their shoe- and insole-adjustment services.[11]

Although European health shoes were new to Japan in the 1990s, these shoes cannot fully explain SA retailers' survival. Many shoe retailers other than SA retailers pounced on these shoes, but only to have them stocked. The shoes may have been good for foot health, but they were expensive and unfashionable. Retailers needed skills and knowledge to adjust the shoes and insoles to fit properly and convince customers of their comfort as SA retailers had; however, shoe retailers, other than SA retailers, lacked the skills necessary to sell them (Shimizu, 1995, pp. 211–214).

Retailer size cannot explain SA retailers' survival either because these were independent small- or medium-sized retailers. Some had second and third stores at some point between the 1990s and 2010s. However, as these stores were typically family-operated, they were within the scale of a small family business.

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[8] For Alpha Miki (No. 1), 'Alpha Miki,' (1993). For Grace (No. 2), Sugawara (1994). For Catch Ball (No. 5), 'Genki,' (1996); 'Ketsudan' (2002); 'Shōhi' (1996). For Shoe Fit Sekine (No. 8), 'Shoe Fit Sekine' (2019). For Alka (No. 13), 'Interview,' (2001), Mizuho Sōgō Kenkyūjo (2002). For Foot and Shoe Science Institute (No. 21), Shōichi Shimizu, owner, in an interview with author, December 14, 2017.

[9] For Alpha Miki (No. 1), Michiko Kida, owner, in an interview with the author, October 4, 2018; 'Alpha Miki,' (1993). For Grace (No. 2), Kunihiko Tatesaka, owner, in an interview with the author, October 26, 2021. For Catch Ball (No. 5), 'Genki,' (1996). For Kutsu no Akashiya, (No. 19), Sadayoshi Asahi, owner, in an interview with the author, November 8, 2021. For Alkomeister (No. 20), Hidetoki Yoshiki and Akiko Yoshiki, owners, in an interview with the author, November 30, 2019. For Maki no Kutsu, Mitsuko Makiya, former owner, in an interview with the author, October 1, 2017.

[10] For Alpha Miki (No. 1), Michiko Kida, owner, in an interview with the author, October 4, 2018; 'Comfort' (2000). For Catch Ball (No. 5), 'Shōhi' (1996). For Schöne (No. 7), Sumiko Tanaka, former owner, in an interview with the author, January 15, 2020. For Profit Iijima (No. 16), 'Shop,' (1999). For Alkomeister (No. 20), Hidetoki Yoshiki and Akiko Yoshiki, owners, in an interview with the author, November 30, 2019. For Foot and Shoe Science Institute (No. 21), Shōichi Shimizu, owner, in an interview with author, December 14, 2017.

[11] Takayuki Igari, in an interview with the author, November 29, 2019; Sumiko Tanaka, in an interview with the author, January 15, 2020.

Exceptions are Alka (No. 13), Nosaka Kutsuten (No. 18), Matsuya (No. 27), and Nakamura (No. 29). Alka and Nosaka Kutsuten began opening multiple SA stores around 2000, after achieving success as SA retailers (Alka, n.d.a; Nosaka, n.d.a). In 2021, Alka had 21 shoe stores (Alka, n.d.b) and Nosaka Kutsuten had seven, all of which were SA stores (Nosaka, n.d.b). Matsuya and Nakamura operated several traditional stores as established local shoe retailers before beginning SA retailing; they added an SA store in the 1990s. As of 2021, Matsuya operates Freude, an SA store, and six other shoe stores (Matsuya, n.d.), and Nakamura operates seven stores and offers SA services on a reservation basis (Nakamura, n.d.). Thus, SA retailers have survived despite being small, aside from Matsuya and Nakamura, who were already medium-sized shoe retailers beyond the scale of family businesses in the 1990s, before starting SA retailing.

Location also does not explain the survival of SA retailers, which have been located throughout Japan, from Hokkaido, the northernmost prefecture, to Okinawa, the southernmost. The retailers' business environments were also diverse. The 'retail centrality' index in Table 2 indicates the extent to which a city absorbs the retail consumption of its residents. A value of more than 1 indicates that the city absorbs consumers from outside the city, and a value less than 1 indicates that the city allows other cities to absorb the retail consumption of its own residents. Retail centrality figures show that the retailers' business environment was not necessarily munificent.

Retailer size and location do not explain the lower survival rates of SF retailers and shoe stores, as 382 SF retailers in 2005 and 13,526 shoe stores overall in 2004 varied in size and location (Foot, Footwear and Health Association, 2005; Keizaisangyōshō, 2006). This indicates that differences in retail formats can explain differences in outcomes.

5. SA Retailer Emergence and Development Process

This section explains how traditional small and medium-sized shoe retailers became SA retailers that were featured in a medical book (Kyoto University Hospital Kango Jissen Kaihatsu Center, 2004) in three subsections. First, the LSRS Law affected large shoe retailers and led to the emergence of discount shoe chains during the 1970s and 1980s. Second, to avoid competition from discount shoe chains, SF retailing, originally proposed by the JIF, spread among small and medium-sized shoe retailers during the 1980s and 1990s. Third, small and medium-sized shoe retailers that were unsatisfied with SF certification met wholesalers of German and other

European health shoes and transformed their stores into SA retailers during the 1990s.

5.1 Shoe Discounters Prompted by the LSRS Law in the 1970s and 1980s

Affected by the LSRS Law, Chiyoda opened the first discount shoe store in Japan in 1977. Since then, discount shoe stores proliferated throughout the 1980s, threatening small and medium-sized shoe retailers.

Chiyoda started opening multiple stores in Tokyo in the 1960s, under the second-generation president, Masao Funabashi, reaching 60 stores by 1970, the highest number of shoe stores belonging to one company in Japan. Chiyoda accelerated store openings between 1970 and 1973, reaching 100 stores in 1973, as Funabashi began to open stores in the SCs developed by supermarkets (Funabashi, 2012).

However, the 1973 oil crisis and the 1974 LSRS Law made it difficult for Chiyoda to open new stores in SCs (Funabashi, 2012). The inflation caused by the oil crisis increased the cost required to open and maintain an SC store.[12] Furthermore, a local shoe store was prioritized when allocating space in SC stores in the coordination process with the local community under the LSRS Law. Chiyoda needed a new growth method to continue opening new stores; thus, Funabashi invented and launched the first discount shoe store in Japan in 1977, along a major road in Toda City, Saitama Prefecture, the suburbs farther from the city than SCs (Funabashi, 2012). The store had two floors comprising 495 m^2 in total and offered a full line of shoes with self-service at discount prices with ample customer parking, in contrast to traditional small shoe stores offering shoes at regular prices in towns and SCs.

The store was a huge success, and Funabashi increased the number of shoe discount stores along suburban main roads across Japan using the same format, under the name *Tokyo Kutsu Ryūtsū Center* (Tokyo Shoe Distribution Center). Chiyoda became the top shoe retailer in Japan in terms of sales by 1981 (Shunkan Kutsu Henshūbu, 1981, p. 10). Chiyoda was one of the innovators of specialty discounters that emerged in the 1970s (Funabashi, 2012; Yahagi, 2004).[13]

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[12] The deposit of several hundred thousand yen [several hundred US dollars] per tsubo (3.3 m^2) increased to ¥1 million [3,581 US dollars] (Funabashi, 2012, p. 50).

[13] Others were Doito, which opened a discount do-it-yourself store in 1972 in Saitama Prefecture, and Aoyama Trading, which opened a discount men's suit store in 1974 in Hiroshima Prefecture (Yahagi, 2004).

The discount shoe stores were successful in attracting customers due to low prices combined with the increased traffic along main roads as the suburban population increased and motorization progressed (Funabashi, 2012; Yahagi, 2004). Although prices per item were lower than those of SC stores, the prices per customer were higher. All customers who drove to the stores bought several pairs of shoes, including for their family, as they could easily transport the purchases in their cars (Funabashi, 2012, pp. 68–69). Rents were much lower than for SC storefronts, as the stores were located in outer suburbs where only farmland and warehouses had previously stood (Funabashi, 2012, pp. 61–69).

Discount shoe retailing became widespread as Chiyoda, and its rival Kutsu no Marutomi, raced to open new stores. Kutsu no Marutomi opened its first discount shoe store in Gifu City, Gifu Prefecture in 1979, and then increased the number of discount shoe stores, under the name *Kutsu Ryūtsū Center* (Shoe Distribution Center) (Tominaga, 1995). The growth of Chiyoda and Kutsu no Marutomi prompted medium-sized shoe retailers to imitate discount shoe retailing. In 1992, of the 23,302 shoe stores nationwide, 1,789 were discount shoe stores (Sugawara, 1992, p. 42), accounting for only 8% of the total number of shoe stores but 25% of the total sales value.[14]

5.2 Emergence and Diffusion of SF Retailing in the 1980s and 1990s

Small and medium-sized shoe retailers in towns were losing customers to suburban shoe discounters; thus, they adopted SF retailing to survive. The JIF originally suggested SF retailing, which was then diffused among small and medium-sized shoe retailers who recognized that adopting this retail format would differentiate them from discounters as a means of survival (Miura, 2019).

Katō Kazuo, a journalist specializing in the shoe industry, founded the JIF in 1965 over concerns that the shoe industry prioritized fashion over function or foot health. Since the spread of Western-style shoes after World War II, no institution had researched shoe function or comfort in Japan; without organized knowledge, consumers, retailers, and manufacturers lacked a basic understanding of shoe comfort (Katō, 1977; Sugano, 1975). Therefore, people tended to focus on fashion instead (Katō, 1977; Sugano, 1975). If shoes fit poorly and were painful, consumers considered this to be expected (Katō, 1977; "Hakiyoi," 1988), and shoe

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[14] The sales value of discount shoe retailing was estimated using sales value and the number of stores by employee size from Shōgyō tōkei (Tsūshōsangyōshō, 1992), under the assumption that all discount shoe stores fall into the 5–19 person store category of the Shōgyō tōkei, and that sales were even across stores in the category.

manufacturers and retailers told customers that shoes would be initially painful but eventually fit well (Kubota, 2001, p. 18; Kuze, 1999, pp. 133–134). Accordingly, the JIF requested that manufacturers make good shoes to fit Japanese people's feet; however, as the JIF was small and on the periphery of the shoe industry, this request was given little attention, except by some shoe-related companies that agreed with the JIF (Katō, 2002).

The JIF changed its strategies during the 1980s. Instead of asking manufacturers to improve their shoes, it appealed to consumers and retailers by focusing on the importance of foot measurement and shoe selection to achieve better shoe fit. The JIF began developing its own shoe-fitting method and training content in 1979 and launched its SF training and certification program in 1984 (Katō, 2002, 2003). The JIF did not intend to limit participation in the course to small and medium-sized shoe retailers; however, small and medium-sized shoe retailers viewed the offer of shoe fitting services by SFs as a way to seize the emerging customer need for well-fitting shoes and differentiate themselves from shoe discounters, avoiding price competition (Miura, 2019). Since shoe discounters adopted self-service for low-cost operation, they could not simultaneously pursue high prices and a high service format. In *Toukutsu*, the newsletter of the Toukutsu Association, a Tokyo-based shoe retailers' organization, one shoe retailer wrote: 'Toukutsu members are facing an increasingly difficult situation because of discount sales by large retailers and the proliferation of discount stores. I believe that the way to survive for those of us who really understand shoes is to become qualified SFs and serve customers from the consumer's point of view' (KKO [Pseud.], 1984).[15] This view has spread, and many small and medium-sized shoe retailers obtained SF certification; by 1992, there were 325 certified SFs across 238 small and medium-sized shoe retailers.[16]

Some manufacturers also took advantage of opportunities to develop comfort shoes. Those shoes sold well at high prices because of consumers' growing interest in foot health caused by the advent of SF retailers (Miura, 2021a). For instance, comfort shoes priced from ¥10,000 ($78) to ¥20,000 ($156) were listed in the comfort shoe purchasing guide for shoe retailers in 1988 ('Shiire,' 1988).

Although shoe fitters were recognized as shoe fitting specialists by shoe retailers and consumers, they were criticized from the beginning. Some journalists believed the training was insufficient for SFs to be considered specialists, as the

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[15] Translated from Japanese by the author.
[16] Figures are from Miura (2019, p. 25), Table 1.

JIF offered SF certification to those who attended a 3-day training program and passed a written test, as well as 50-foot measurement tests (Ōtsuka & Abe, 1990; Ōya, 1988). They also noted that a lack of expertise among SFs led to inadequate services that would disappoint, or sometimes even harm, consumers (Ōtsuka & Abe, 1990, p. 15). Some SFs themselves recognized their lack of expertise ('Kouriten ni Interview,' 1988; 'Kouriten ni Kiku,' 1988; Ōtsuka & Abe, 1990, p. 22). However, the JIF believed that it was the shoe retailers' fault for not providing adequate education. It criticized training program participants for not seeming eager to study and only attending the program to receive their certification (Ōya, 1988, p. 37). The JIF believed a minimum of one week of training was necessary; however, shoe retailers argued that they could not leave their stores for that long. Therefore, the JIF had to shorten the training program to 3 days.[17] Furthermore, SFs believed that customer dissatisfaction was partially due to the customer's misunderstanding. Some consumers mistakenly believed that SFs could solve any foot problem. Some women chose SFs to find comfortable yet fashionable shoes. They wanted SFs to select pumps that would not hurt their feet after they wore them all day ('Professional,' 1988); however, wearing pumps for prolonged periods inevitably hurt one's feet, even if the shoes fit properly. Sometimes, customers came with serious problems that were beyond the skillset of SFs ('Kouriten zadankai,' 1988, pp. 36–37).

JIF did not let the training problems go unaddressed and introduced a six-month advanced course in 1988, responding to requests from some diligent SFs (Ōtsuka & Abe, 1990). However, the number of dedicated shoe fitters was limited. In 1992, out of 1,380 certified SFs, only 126 (9%) had completed the advanced course (Japan Institute of Footwear, 1992).[18]

5.3 Emergence and Development of SA Retailing in the 1990s and 2000s

The spread of SF retailing intensified competition among SF retailers. In this environment, SA retailing emerged from an interaction between those small and medium-sized shoe retailers, who wanted to improve their shoe fitting skills to differentiate themselves from SF retailers, and small and medium-sized shoe wholesalers, who wanted to sell European health shoes. To expand the sales of those shoes, wholesalers started offering orthopedic shoe technique (OST)

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[17] Hiromu Yamamoto, former JIF executive director, December 8, 2015 (Miura, 2019, p. 31).

[18] For SFs who completed an advanced course, the JIF offered a further two-year advanced course, Master Course, in 1992, and 19 of them took the course. However, Master Course was only provided once (Katō, 2002).

seminars that taught shoe- and insole-adjustment skills to shoe retailers. Consequently, some small and medium-sized shoe retailers honed their abilities and became SA retailers.

Germany established itself as a leader in foot health because of its extensive experience with injuries from World War I (Kuze, 1999; Makiya, 1997). German health shoes were continuously and systematically imported to Japan first by Alice Christians, a German woman living in Kobe City, Hyogo Prefecture, who originally worked outside the shoe industry. Unable to find good shoes ideal for foot health in Japan, she established Alice Inc. in 1984 to import German health shoes ('Interview, sōgyō,' 1999, p. 104). She opened a small store to sell these shoes and started a small wholesale business. In 1987, she invited master orthopedic shoemaker Karl Heinz Schott to offer health shoe- and insole-adjustment services in her shop and for shoe retailers that stocked health shoes from Alice Inc. ('Interview, sōgyō,' 1999, p. 105). A master orthopedic shoemaker is a national qualification in Germany and German-speaking countries, obtained by passing an examination after 7–8 years of classroom and practical training in shoemaking and orthopedics. Master orthopedic shoemakers craft orthopedic shoes, or foot orthoses, under a doctor's prescription in those countries.

Following Christians, Shimizu, owner of Foot and Shoe Science Institute (No. 21); Yasuo Kuze, owner of Alka (No. 13); and Michio Endō, owner of Ban San-sho, began to import German and other European health shoes in the 1980s. In their previous shoe-related businesses, they all experienced difficulties, such as bankruptcy and lack of sales or profits. They were looking for a way to overcome these issues, when they came across German health shoes and master orthopedic shoemakers and were impressed by the quality work of both ('Endō,' 2005, p. 133; Kuze, 1999; Shimizu, 1995).

Shimizu's wholesale company went bankrupt in 1983 due to overinvestment in his original shoes, which were modeled after European health shoes (Shimizu, 1995). Shimizu met Schott at Alice Inc. in 1987 and was so impressed that he invited him to be an adviser when he restarted his health shoe business as the Foot and Shoe Science Institute, in 1988 (Shimizu, 1995). Kuze owned Alka, a small shoe store offering high-quality European dress shoes, such as high-end English footwear—Church's shoes—because he thought those shoes were comfortable; however, they were expensive and did not sell well (Mizuho Sōgō Kenkyūjo, 2002, p. 36). He went to Germany in 1987 after he heard from a doctor friend that Germany was a leading country for foot health. He was impressed by the quality of German health shoes and master orthopedic shoemakers, and started importing health shoes from Germany and Switzerland for retail and wholesale ('Interview,' 2001, p. 36; Mizuho Sōgō Kenkyūjo, 2002, p. 36). In 1990, he established a wholesale company named Schritt ('Schritt,' 1992). Endō ran a shoe export business from Japan to Hong Kong, but it was ruined by the strong yen caused by the Plaza Accord in 1985. He searched for imported shoes instead and found German health shoes at the Tokyo Shoe Fair in 1987 ('Tokyo,' 1987; 'Endō,' 2005, p. 133). The shoes looked unfashionable—like 'catfish' because of their wide toes—but were comfortable when he tried them on; therefore, he began to import them ('Endō,' 2005, p. 133).

Shimuzu, Kuze, and Endō started to import European health shoes, but the shoes did not sell well initially (Makiya, 1997; Shimizu, 1995). European health shoes were functional but unfashionable and expensive, making wholesale difficult. Typical health shoes looked odd to Japanese people at the time (Figure 2). One female customer, who tried on the shoes at the Foot and Shoe Science Institute's store, stated: 'I'd rather die! I'm so embarrassed that I can't go to work [wearing these shoes]. I'd rather put up with pain' (Shimizu, 1995, p. 153).[19] In addition, priced at around ¥30,000 ($237), they were more expensive than Japanese comfort shoes, which were already considered expensive at around ¥20,000 ($158) ('Zone,' 1992).[20] Thus, it was impossible to sell them unless retailers had the knowledge and skills that could make consumers realize the benefits of European health shoes. However, few such skillful shoe retailers existed, and few were willing to purchase shoes that were so difficult to sell in the first place ('Endō,' 2005, p. 133; 'Interview Fuss und Schuh Institut,' 1999, p. 44; Shimizu, 1995).

To overcome the lack of partner shoe retailers to sell European health shoes, Shimizu, Kuze, and Endō each started OST seminars for shoe retailers. As owners of small shoe wholesalers and retailers, they needed retail partners from both a commercial and moral standpoint.[21] Commercially, to sustain their European health shoe import business, an appropriate scale was necessary (Kuze, 1999).[22] Furthermore, morally, they wanted to help people with foot problems who came to their stores from all over the country; however, it was beyond their capacity as

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[19] Translated from Japanese by the author; words in brackets are by the author.
[20] At the dollar–yen rate in 1989.
[21] Paige and Littrell (2002) also found that the objectives of small retailing are not only commercial but also cultural or moral, based on the analysis of small craft retailers.
[22] Shōichi Shimizu, owner of Foot and Shoe Science Institute, in an interview with author, December 14, 2017.

small retailers and they needed retail partners (Kuze, 1999; Shimizu, 1999). By acquiring partners, they ultimately aimed to raise the awareness level among the Japanese regarding the functionality of these shoes and their benefits to foot health, and not just their fashion value ('Interview,' 2001, p. 37; Kuze, 1999; Mizuho Sōgō Kenkyūjo, 2002, p. 37; Shimizu, 1999; Ōya, 1996a, p. 103). They viewed the master orthopedic shoemakers' knowledge and skills as ideal for selling European health shoes; thus, each of them invited a master from Europe to serve as a lecturer and began offering OST seminars. To encourage shoe retailers to participate, importers praised the seminars as authentic and explicitly or implicitly distinguished them from SF training, as a place where small participant groups received sufficient practical training from the masters through a course that took at least two years to complete ('Fukyō,' 1995, p. 53; Ōtsuka & Abe, 1990, pp. 21–25).

Figure 2. German Health Shoes

Source: Photo by the author.
Note: The same model as the first one Christians imported into Japan, provided by Shigehiro Sakata, owner of Shoe laboratory Condor.

Shimizu and Kuze were particularly active in organizing OST seminars from the beginning, starting the seminars in 1989 (Shimizu, 1995) and 1992 ('Schritt,' 1992, p. 102; 'Wadai,' 1994), respectively. Endō started a short-term OST seminar in 1993, as he initially appeared reluctant to hold an intensive OST seminar with a medical component; however, he began full-scale long-term seminars in 1997 ('Interview,' 1996, p. 54; 'Interview Fuss und Schuh Institut,' 1999, p. 45). Although Alice Christians was a pioneer in inviting a master OST,[23] she was hesitant about OST seminars and began offering them only in 1998 ('Interview, sōgyō,' 1999, p. 105).

Some small and medium-sized shoe retailers perceived the wholesalers' initiatives as opportunities. They also searched for breakthroughs for both commercial and moral reasons. They viewed honing their shoe- and insole-adjustment skills and offering better-fitting shoes as ways to differentiate themselves from shoe discounters and SF retailers and survive. In the 1990s, SF retailers faced mounting competition. Although SF retailing was still common among small and medium-sized shoe retailers, department stores, as a high-priced, high-quality service retail format, also adopted SF retailing in their shoe sections. In 1992, 31 department stores had 335 SFs across 126 shoe sections selling comfort shoes, which was approximately equivalent to 238 small and medium-sized shoe retailers with 325 SFs.[24] Comfort shoe production also flourished, as they were sold at small and medium-sized SF retailers, department stores, and discount shoe stores. Shoe discounters offered lower-priced versions of shoes that claimed comfortability ('Ryōhanten,' 1989). Therefore, some small and medium-sized shoe retailers joined OST seminars because they believed that, while the shoe assortment could be imitated, the skills could not (Joyochiiki Kenkyū Center, 2009, p. 18; Ōya, 1996b, pp. 92–93). Moreover, improved shoe- and insole-adjustment skills were a way to help customers who were unsatisfied with SF retail service. Some shoe retailers wanted to improve their shoe-adjustment skills to help customers who had difficult foot problems and acquire enough knowledge to make customers understand that the main function of shoes is to keep feet healthy, not to make them look fashionable. ('Interview,' 1991; Makiya, 1997, pp. 230–235; Ōya, 1996c, p. 117).[25]

The investment burden, including the cost of seminars, imported health shoe inventory, and adjustment equipment, was substantial; however, these retailers devoted themselves to acquiring the orthopedic shoe technique ('Kenkō,' 2015).[26] The number of shoe retailers who had studied those skills for more than

[23] Sadayoshi Asahi, owner of Kutsu no Asahiya, in a letter to the author, September 11, 2022.
[24] Figures are from Miura (2019, p. 25, Table 1).
[25] Michiko Kida, owner of Alpha Miki, in an interview with the author, October 4, 2018; Sumiko Tanaka, former owner of Schöne, in an interview with the author, January 15, 2020.
[26] Hidetoki Yoshiki and Akiko Yoshiki, owners of Alkomeister, in an interview with the author, November 30, 2019; Kunihiko Tatesaka, owner of Grace, in an interview with the author, October

two years was estimated at 50 to 70 in 2000.[27] As import sales increased, Kuze's Schritt and Endō's Ban San-sho became the leading European health shoe wholesalers; their total sales quadrupled from ¥550 million in 1992 to ¥2,640 million in 2004 (Yano, 2009, pp. 22, 298, 379).

Although the wholesalers' sales grew, they did not control or restrict the retailers. Retailers joined various wholesalers' OST seminars and purchased health shoes from different wholesalers. Retailers rather organized themselves; one of the most recognizable groups was German Orthopaedic Shoe Research (GOSR), which was founded in 1999 with 25 members ('Doitsu,' 1999, p. 38; Miura, 2021b). Those who had studied at OST seminars for more than two years could join GOSR. Members sometimes made joint purchases from wholesalers and foreign manufacturers. In addition, they continued to learn together, from master orthopedic shoemakers, orthopedists, sports physicians, and other shoe, foot, or health experts and attended various medical conferences (German Orthopaedic Shoe Research, n. d.; Monet Teramoto, n. d.).[28] Although changes in membership have occurred, GOSR still continues these activities.

The nurses at Kyoto University hospital discovered GOSR in the process of searching for reliable shoe retailers, and consequently, 30 shoe retailers comprising 26 GOSR members and four other shoe retailers were listed in the medical book as SA retailers (Kyoto University Hospital Kango Jissen Kaihatsu Center, 2004, pp. 13–14, 27–28).[29]

26, 2021; Mitsuko Makiya, former owner of Maki no Kutsu, in an interview with the author, October 1, 2017; Takayuki Igari, former owner of Catch Ball, in an interview with the author, November 29, 2019.

[27] I estimated the number of retailers who had finished one or more OST seminars lasting two years or more based on books and interviews, after excluding duplicates (Kaoru Kuribaayshi, owner of Footmind, in an interview with the author, January 31, 2019; Kayo Kubota, Schritt, in an email to the author, September 14, 2022; Kyoto University Hospital Kango Jissen Kaihatsu Center, 2004, pp. 130–131; Masateru Teramoto, owner of Monet Teramoto, in an interview with the author, February 1, 2019; Sadayoshi Asahi, owner of Kutsu no Asahiya, in an interview with the author, November 8, 2021; Shimizu, 1999, p. 206; Yasuo Kuze, owner of Alka and Schritt, in an interview with the author, March 9, 2018, Van San-sho, n.d). This is consistent with the documentation that about 50 shoe retailers participated in the IVO (International Association for Orthopaedic Shoe Technicians) World Congress 2000 in Friedrichshafen, Germany (Kuribayashi, n.d.).

[28] Masateru Teramoto, owner of Monet Teramoto, in an interview with the author, February 1, 2019.

[29] Mutsuko Nishiyama, president of GOSR and owner of Room-9 Nishiyama Kutsu kenkyūjo, in a letter to the author, February 18, 2021.

6. Conclusion and Discussion

This study illustrates how small and medium-sized shoe retailers have survived in Japan in the late 20th and early 21st centuries. Influenced by the LSRS Law, large shoe retailers established suburban discount shoe chains, which threatened small and medium-sized shoe retailers in towns. Facing the threat of these shoe discounters, small and medium-sized shoe retailers differentiated themselves by adopting the SF retail format after viewing opportunities in the JIF's activities. However, as the SF retailing advantage began to crumble and foot problems arose which could not be addressed by SF retailing, some retailers further honed their skills and became SA retailers after seeing an opportunity in the activities of small wholesalers of European health shoes. They survived through retail format innovation to address foot health concerns. As the concerns were universal needs that large stores failed to meet, they attracted customers from outside and inside their local regions. Therefore, they survived regardless of their location.

This study presents a history of a limited number of small and medium-sized shoe retailers, which is hardly representative of small and medium-sized retailers of this period. However, it helps clarify the bias of previous research that might inhibit the observation of innovative small and medium-sized retailers, which are the macro and locality perspectives. Apart from these perspectives, this study finds small and medium-sized retailers that are innovative. Observation at a micro, not a macro, level using dimensions other than the local community or shopping street, as this paper did, is one way to find innovative small and medium-sized retailers.

This study has implications for research of modern retail history in Western countries. Even in these countries, small and medium-sized retailers' contribution to the community has been discussed (Alexander & Phillips, 2006; Baron et al., 2001; French 2008). In the late 19th and early 20th centuries, when modern large-scale retailing emerged and developed in Western countries, small and medium-sized retailers served local customers, and their contribution to the community was important. In the latter half of the 20th century, however, the distribution of people and information became freer. Given these environmental changes, it is beneficial to focus on small and medium-sized retailers that survived without being restricted to their local communities. Clarifying the development history of small and medium-sized retailers from this perspective is also useful in considering their survival strategies in an era when regional restrictions on retailers have further diminished with the rise of Internet shopping.

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