The developmental history of the insole market in Japan:
Rising health consciousness and an unintended shift
toward fashion (1984–2010)

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Abstract
This paper examines the historical development of the transparent-insole market, which has experienced growth since the mid-2000s. According to the previous discourse, the market grew as companies recognized potential demand among young women for the functionality and fashion value that transparent insoles could offer. Underlying that explanation, however, are the key questions of how those needs took shape and how entrepreneurs identified opportunities to push products into the arena. This paper thus expands its focus to the context prior to product rollout and the chain of actions and interactions by multiple actors evolving from that context for a fuller examination. A private organization’s calls for functionality over fashion—the latter of which had previously received priority in the shoe market—raised consumer awareness of foot health. Seeing that growing consciousness as a source of potential business opportunities, multiple insole manufacturers then began pursuing various initiatives, thereby sparking the emergence and growth of the fashionable transparent-insole market as an unintended consequence of a private-organization initiative. This paper examines the shoe industry since the 1990s, which has not featured prominently in previous research, to advance scholarship on the history of the shoe industry.

Keyword: Market development, Unintended consequences, Shoe insole, Health industry, Social movement

I. Introduction
This paper examines the historical development of the transparent-insole market, which has experienced growth since the mid-2000s. One example of its success is how transparent insoles, all in exquisite packaging, lined an entire wall at SONY PLAZA GINZA, a variety store in the Sony Building in the high-end shopping district of Ginza, Tokyo. The insoles themselves had their own aesthetic allure; some were rose-shaped, and some were glittery. Made with clear gel (elastomer) and millimeters thin, transparent insoles are partial pads that are usually inserted into the forefoot portions of mules,

1 Maeda Tōichirō (president of Arakawa Sangyo Co., Ltd.), in an interview with the author, May 10, 2021.
2 “Arakawa Sangyo, ‘Jewelry Soles' to ‘Tacco insoles' de kaisō” [Arakawa Sangyo cruising with strong sales of Jewelry Soles and Tacco insoles], FW press (August 2001): 21; “Mono ryūkō: Kutsu no nakajiki, tōmei de meda-
pumps, and other footwear to provide shock absorption for comfort without the conspicuous visibility of non-transparent items. The products grew popular enough to warrant their own displays and racks in variety stores, drugstores, and other stores (Fuji Keizai 2007).

How did the transparent-insole market manage to take off and establish that type of presence even though the entire insole market had already reached saturation by the time transparent insoles came along? Market-research firm Fuji Keizai attributes the products’ success to a blend of functionality and fashion, which combined to meet the needs of young women; the market gradually grew, Fuji Keizai suggests, as more and more companies started making products to meet that emerging demand. However, the underlying questions deserve closer examination. Where did those needs come from? How did entrepreneurs locate the market opportunities that led to their full-scale product releases in the 2000s? The paper answers those questions by providing a fuller explanation of the market’s emergence and growth rather than simply proposing a functional explanation. Focusing not only on what happened after the products hit the market but also what happened before that (Kirsch et al. 2014), this paper illustrates how the transparent-insole market emerged and developed through a chain of actions and interactions by various players (Nakagawa et al. 2014; Numagami 2000; Shimamoto 2001). That deeper exploration reveals that the transparent-insole market emerged as an unintended consequence of the activities of a private organization. The private organization called for functionality over fashion—the latter of which had previously received priority in the shoe market—and that raised consumer awareness of foot health. Entrepreneurs saw the changing consumer needs as an opportunity and embarked on various initiatives. The chain of their actions brought the emergence and development of the fashionable transparent-insole market. Thus, the private organization that had made the call for embracing the element of shoe functionality inadvertently laid the groundwork for what would become a transparent-insole market with fashion at the fore.

In this paper, “insoles” refer to inserts added to finished shoes, not inserts sewed to the upper leather during the manufacturing process. “Shoes,” meanwhile, denote Western-style shoes, not traditional Japanese footwear like zōri (thonged sandals) or geta (wooden sandals).

To situate this paper within the established history of the Japanese shoe industry, the following section briefly explains the historical context. The Japanese shoe industry has belonged to different industries since its inception. First, it was a segment of the defense industry. As a transplant industry that came to Japan from West during the Meiji period in the second half of the nineteenth century, the Japanese shoe industry got its start manufacturing combat boots (Koshō 1966; Leather Industry History Compilation Committee 1959, 1989; Sato 1971). With the successive conflicts of the Sino-Japanese War, Russo-Japanese War, and World War I during the late nineteenth and early twentieth centuries, the industry saw its production capacity swell (Koshō 1966; Miura 2017) as major shoe manufacturers imported production machinery to mechanize their operations.

tazu danryokusei mo” [Product trends: Transparent, inconspicuous and elastic shoe inserts], Yomiuri Shimbun morning edition, June 22, 2009, 16.

3 In Japan, there have traditionally been a variety of situations where people need to remove their shoes outside the home (in certain restaurants, for example).

4 “Mono ryūkō: Kutsu no nakajiki, tōmei de medatazu danryokusei mo,” 16.
Japan’s defeat in World War II spelled the end of the shoe industry’s orientation within the defense industry, however. Shoes were subsequently repositioned into their second industrial context: the clothing industry. The big, mechanized players that had carved out dominant positions in the shoe sector before the war worked to adapt their operations from satisfying military needs to meeting private demand. Small and medium-sized manufacturers increased their production of women’s shoes (Satō 1971). By the 1970s, one of the dynamics characterizing the shoe industry, where market power diverged both horizontally and vertically, was the multi-dimensional competition over constructing brands that consumers would align with (Seki 1975). In the field of men’s shoes, the premiere manufacturers from the prewar era had established brand names. In women’s shoes, wholesalers had the dominant brand presence, and they had their shoes produced by small and medium-sized manufacturers. However, since shoes were fashion items and little more than a secondary accessory to pair with clothing (Iwamoto 2014; Seki 1975), those product brands could not perfectly control the market. The store brands of major shoe retail chains held sway over the contemporary marketing landscape at the same time.

The clothing industry remains the shoe industry’s general frame of reference, but another industrial context emerged in the 1980s: the medical and health industry. Integral to that shift into a third category was a private organization by the name of the Japan Institute of Footwear (hereinafter “JIF”), which contended that the functionality of footwear—its role in keeping feet healthy—should come before the fashion element. In that spirit, in 1984, JIF began training and certifying “shoe fitters” (SFs) capable of helping consumers find exactly the right size of shoes for their feet from a health perspective. Small and medium-sized shoe retailers saw in-store fittings by SFs as a way of upping their service levels in the face of competition from “roadside shops” (stores of large shoe discounters), which marketed shoes at discount prices by eschewing employee assistance in favor of a self-service, customer-led purchasing process (Miura 2019). As that strategy gained its footing, the numbers of qualified SFs began to grow. By 1992, the number of them reached 1,398 (Japan Institute of Footwear 1992, 38).

The shoe industry has thus occupied different contextual positions—going from the defense industry to the clothing industry—from its birth to today. This paper concentrates on a liminal phase in that evolution by examining the 1990s and the years since, a period where the shoe segment has remained planted within the larger clothing industry but also taken some exploratory steps into the medical and health field.

This paper is organized as follows. Section II explains the data used in the historical case study. Section III presents the history of the insole market, explaining the antecedents and context from which transparent insoles emerged, and then the market’s developmental process. Finally, section IV summarizes this study’s findings and discusses its contributions to the literature.

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5 Originally the Japan Institute of Women’s Footwear (IWF), established in 1965, the organization expanded its scope to include men’s shoes and adopted the new JIF name in 1973. The JIF went on to rename itself the Foot, Footwear and Health Association (FHA) in 1997 (Katō 2002) and become a general incorporated association in 2009 (Foot, Footwear and Health Association 2015).
II. Comments on data

This paper draws on a variety of sources to illustrate the insole market’s developmental history by elucidating the chain of interpretation and actions by multiple players from a long-term standpoint. The main source was FW press (standing for “Footwear press”; also known as Fottouea presu and Footwear press at different points in its history), a monthly trade publication. To understand the context of and important developments in the shoe industry, I obtained and reviewed all the issues of FW press from 1984 to 2010 (the main period for the paper’s analysis). I also drew on articles from the Yomiuri Shimbun, the largest-circulation national newspaper in Japan, for an analysis of foot-health awareness in Japan. My other newspaper references were the Nihon Keizai Shimbun, Nikkei Ryutsu Shimbun (Nikkei MJ), and Nikkei Sangyo Shimbun, which, due to their focus on economics-related content, offered substantial, comprehensive coverage of new insole products. I created a database of the article summaries from the above sources in Microsoft Excel. I also interviewed three individuals from two insole manufacturers to help me better interpret the written sources. While I loosely categorized my different media sources by analytical objective, as I explained above, I triangulated them as much as possible to eliminate bias (Kipping et al. 2014; Yates 2014). The database proved useful in that process.

III. Rising foot-health consciousness and the development of the insole market

1. Shoe fitters enter the picture, boosting awareness of foot health (1965–1995)

Health consciousness entails an awareness of preventing and treating ailments throughout the body, including the feet, and it was in the mid-1980s that foot health began to draw significant amounts of attention. The Yomiuri Shimbun, for example, started running articles making notable mention of bunions (hallux valgus)—a common foot ailment—in the latter half of the decade (Figure 1). SFs played a sizable role in bringing interest in foot health to the fore in the late 1980s and 1990s. Fitting services provided by SFs offered a solution to foot problems that customers had been looking for on a subconscious level. Figure 1 also shows the numbers of articles dealing with bunions that also made mention of SFs. As coverage of bunions increased in the second part of the 1980s and through the mid-1990s, the proportion of bunion-related articles making reference to SFs ranged from 30% to 100%. In popular consciousness, as I explain below, foot health and SFs were thus developing strong associations.

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6 I received the issues from Toshimi Fukui (president of Fukui Shoelast Mfg. Co., Ltd.) on December 9, 2019.
Figure 1: Numbers of articles mentioning bunions (hallux valgus) and shoe fitters.

Source: Prepared by the author based on Yomiuri Shimbun.
Note: A search for “gaihan boshi” (bunions, or hallux valgus) and “shū fittā” (shoe fitter) was conducted on the Yomiuri Database Service, and 211 cases up to the year 2010 were included in the analysis. There was also one article each in 1933 and 1957.

Many women began to have foot problems around 1980 because of the ready-made pumps that circulated widely in the market after World War II. After the war, the Japanese shoe market made a rapid shift from custom-made shoes to ready-made shoes; the days of tailoring shoes to the individual wearer had passed. In the war’s immediate aftermath, retailers stocked ready-made offerings but also ran in-house workshops for handling custom orders and repairs (Inagawa and Yamamoto 2011). At the workshops, retailers measured customer’s feet and made custom-made shoes by hand. However, in-house workshops eventually vanished as technical development in manufacturing processes, along with the accompanying advent of mass production, pushed custom-made shoes to the wayside and ushered ready-made footwear into the mainstream.7 Women’s shoes went the way of mass production particularly thanks to the spread of cementing, which was patented in Spain in 1932 and later popularized in Japan in the 1960s (Inagawa and Yamamoto 2011; Ōtsuka 1991; Satō 1971). The technique, which involved heat-bonding the upper leather to the sole of the shoe instead of sewing the pieces together, was much more efficient than the traditional stitching approach.

The predominant style in women’s shoes in the postwar period was pumps. Since pumps were formal, fashion-oriented shoes, women wore them any time, for both work and pleasure (Japan Institute of Footwear 1988, 1992). Pumps were not healthy for their feet, though. Unlike laced shoes, which kept the wearer’s instep in place, pumps were prone to slippage; the wearer’s feet could slide forward, creating painful pressure. High-heeled shoes, with their steep downward angles, were especially hard on the wearer’s feet (Kotō 1989).

7 For more on the technical development in the shoe manufacturing process, see Church (1968) and Miranda (2004).
When ready-made shoes strode into mainstream in the 1960s, therefore, women began wearing mass-produced pumps—shoes that would not be tailored to each unique individual’s feet, potentially exacerbating the inherent harm of the pump style. Poorly fitting shoes tend to cause more foot problems as people’s foot muscles weaken over time. Women who started wearing pumps in their twenties during the 1960s were in their forties during the 1980s, by which time, unsurprisingly, legions of women had begun to experience foot problems (Katō 2002).

Despite the growing numbers of women battling foot issues, no players in Japan had actively worked to address the situation with potential solutions before the mid-1980s. Consumers just assumed that new shoes were, by nature, painful at first (Kuze 1999). People understood that ill-fitting shoes could create shoe sores and blisters in the short term, but they did not understand that those short-term problems could lead to bunions and other serious foot deformations in the long term. Consumers thus made their shoe choices based on how the shoes looked and simply put up with the pain of wearing them (Sugano 1975). A 1988 survey by the Nada-Kobe Consumer Cooperative found that half of the respondents (the total number of which is unknown) said that they still wore the shoes despite knowing that their feet would hurt (Ōtsuka and Abe 1990, 20). A 1985 study by the Consumer Science Research Institute of Hyogo Prefecture (“Fujin-gutsu ni kan suru jittai chōsa hōkoku” [Fact-finding report on women’s shoes]) produced similar results (Ōtsuka and Abe 1990, 18–20). Looking at these surveys, Ōtsuka and Abe concluded that consumers “tended to prioritize design and color over comfort” (Ōtsuka and Abe 1990, 19). Manufacturers followed suit by adhering to the trends of the times and working to satisfy consumer demand for fashionable shoes (Ōtsuka and Abe 1990; Sugano 1975). Retail salespeople, lacking expert knowledge about feet, reassured customers that shoes lacking comfort due to a poor personal fit or a priority on design would start to fit more comfortably in time (Kubota 2001; Kuze 1999). It all happened within a context where few were paying attention to the connections between feet, shoes, and health. With research on the topic virtually non-existent both in the shoe industry and at the university level, a systematic framework of related knowledge had yet to take shape (Sugano 1975). There were no foot-disorder specialists in the contemporary medical field, even (Ōtsuka and Abe 1990). While there were orthopedists and prosthetists and orthotists (POs) in practice, they dealt with the entire body and did not necessarily have specific expertise in foot afflictions.8

That was the context in the shoe market when the JIF began training and certifying SFs in 1984 (Miura 2019). The JIF had formed in 1965 around a group of Japanese shoe manufacturers that were concerned about the low quality of domestic shoes and hoping to produce better, higher-functionality shoes—products that would function to assist in, rather than inhibit, walking. The members urged the Japanese shoe industry to stop ignoring functionality in the name of fashion, but the projects that the organization promoted failed to garner much attention (Katō 2002). One effort that did have an impact, however, was its initiative to train SFs, which began in 1984. The original impetus for the programs was a 1972–73 drive to obtain foot measurements from 1,000 men and 1,000 women nationwide in hopes of better understanding Japanese feet. The survey discovered that 65% of the men and 95% of the women had “visually perceptible problems with their feet, such as skeletal deformities, nail deformities and discoloration, and skin damage” (Katō 2002, 124). The JIF attributed the troubles to bad-
fitting shoes. Given the lack of any systematic knowledge on proper fitting, the JIF incorporated the concept of SFs from Europe, devised its own methods and educational content for fitting training programs, and eventually started offering official workshops in 1984 (Katō 2003).

Media coverage of the JIF’s new project brought attention to SFs from both shoe-industry players and consumers at large. A significant portion of the participants in SF training programs came from so-called “mom-and-pop” shoe sellers. Because these types of small and medium-sized retailers in traditional shopping districts faced the threat of roadside shops in the suburbs pushing them out of the market, they recognized that having certified SFs offer in-store fitting services could be a differentiation strategy for their survival (Miura 2019). SFs thus served as the means of achieving the JIF’s hopes for better shoe functionality. The JIF worked to underscore the benefits SFs could offer by highlighting several points: that wearing low-functionality, bad-fitting shoes for long periods of time was bad for the wearer’s health, that no one should need to put up with shoe-induced pain, that choosing the right shoes would allow people to avoid shoe-induced pain, and that picking the right shoes for each person was an SF’s job as a shoe-fitting specialist (Japan Institute of Footwear 1984, 1988, 1992). Consumers and the media apparently bought into that message, too (Figure 1). An article in the May 29, 1992, issue of the Yomiuri Shimbun, for example, explained that “Feet can get blisters. They can develop bunions, where the big toe turns painfully inward. They can get hammer toe, too, a condition that comes with nail and bone deformities. Preventing those foot issues is the calling of shoe fitters, who double as fit technicians and shoe counselors in helping keep feet healthy.”

SFs had become known to people by the early 1990s, with relatively high levels of visibility among women. In 1992, 39% of women between the ages of 20 and 69 said that they were familiar with, were generally familiar with, or had heard of SFs, compared to 34% of men in the same age group. Consumers basically perceived SFs as specialists who could help women with foot problems choose the optimal footwear to alleviate the issues.

JIF was not the only organization calling attention to the connections between shoes and health in the 1980s (Toukutsu Kyokai 2021). Another group with a similar vision was the orthopedist-led The Japanese Society for Medical Study of Footwear, which formed in 1987. While these and other voices did emerge, JIF—a small private organization—had already launched its SF training programs in 1984, showing its forward-looking stance.

2. The walking-support insole market evolves (1995–2010)

(1) A shift from hygiene to walking-support insoles
With the growing prevalence of the SF concept came a burgeoning interest in foot health, which, in turn, fostered changes in the insole market from the mid-1990s onward. The dominant products in the market shifted from insoles with hygienic functionality to insoles that put the emphasis on walking support.

9 “Anata no sentaku ketsudan, shoe fitter, ashi no kosei o tsukamu” [Shoe fitters make the right choices for your feet’s unique features], Yomiuri Shimbun Osaka morning edition, May 29, 1992, 16.

10 The survey, a mail-in study that took place in December 1992, produced 842 valid responses from a random sampling of men and women ages 15–69 (425 men and 417 women; “Data & data” [Data and data], Footwear press (September 1993): 79–80).
Shoe retailers in postwar Japan normally offered insoles to customers buying dress shoes as free add-ons for making size and fit adjustments. The dynamic changed in the mid-1970s, however, when Chūō Bussan began selling “Odor-Eaters” (manufactured by Combe Incorporated, a US company) in 1976—and a separate market for insoles was born (Fuji Keizai 1999).\textsuperscript{11} In the 1980s, Odor-Eaters got a lift in visibility when Kobayashi Pharmaceutical took over the brand and rolled out a string of TV commercials advertising the products (Fuji Keizai 2000). Hygienic insoles for men’s dress shoes were the dominant product category in the market since then and into the 1990s, when the insole market was at full maturation. Into that context came women’s insoles (Figure 2), a new category that saw its market share rise from 14% in 1995 to 33% in 2010. Contrasting the standard hygienic insoles with odor-eliminating functions and/or high breathability, women’s insoles emphasized walking support through shock absorption, pain-mitigating functions, and/or improved walking balance (Fuji Keizai 1999, 2000, 2001, 2002, 2003, 2006, 2007).\textsuperscript{12}

**Figure 2: Trends in insole market size**

![Figure 2: Trends in insole market size](image)

Source: Prepared by the author based on Fuji Keizai, *Toiletry goods marketing yōran* [Toiletries marketing directory] (Tokyo: Fuji Keizai, 1999, 122; 2000, 139; 2001, 137; 2011, 117).

\textsuperscript{11} “Chūō Bussan, Bei Combe-sha kara kasseitan-iri kutsu no nakajiki, ‘Odor-Eaters’ o yunyū, hanbai e” [Chūō Bussan to import and market “Odor-Eaters,” the activated-carbon shoe inserts made by Combe (US)], *Nikkei Ryutsu Shimbun*, June 6, 1976, 7.

\textsuperscript{12} A similar description can be found in “Hirugutsu nimo nakajiki, ‘insole’ de kaiteki hokō: Ashi no katachi ni micchaku, futan keigen” [Close-fitting, burden-reducing insoles support comfortable walking in heeled shoes] in a 2006 issue of the *Nihon Keizai Shimbun* morning edition (November 22, 2006, 37).
The number of new products introduced into the market highlights that shift. From the mid-1990s on, the numbers of walking-support insoles continued to grow until eventually eclipsing those of the formerly dominant hygienic category (Table 1). The Table also shows a slight increase in the mid-1990s for insoles with “Relaxation” functions, which served to improve circulation by applying pressure to points or using far-infrared light.

### Table 1: Number of new insole products by function

| Function        | 1980~1984 | 1985~1989 | 1990~1994 | 1995~1999 | 2000~2004 | 2005~2009 |
|-----------------|-----------|-----------|-----------|-----------|-----------|-----------|
| Hygiene         | 7         | 25        | 14        | 21        | 10        | 7         |
| Cold-resistance | 2         | 3         | 7         | 3         | 1         | 2         |
| Walking support | 0         | 6         | 6         | 17        | 27        | 32        |
| Relaxation      | 2         | 1         | 4         | 6         | 4         | 4         |
| Others          | 0         | 0         | 1         | 3         | 7         | 3         |
| Unknown         | 1         | 1         | 0         | 0         | 1         | 0         |
| Total           | 12        | 36        | 32        | 50        | 50        | 48        |

Source: Prepared by the author based on the Nihon Keizai Shimbun, Nikkei Ryutsu Shimbun (Nikkei MJ), and Nikkei Sangyo Shimbun.

Note: 1,072 articles were searched for “nakajiki” [shoe insert] and “insōru” [insole] on Nikkei Telecom, the database of Nikkei newspapers, and those that were not newly launched insoles were excluded. Duplicates were also excluded. For products featuring multiple forms of functionality, the main form was identified based on the title and text of the article(s).

Authors have attributed the growth of the walking-support insole market to a rise in foot-health awareness (Sugawara 1999) as consumers began seeking out ways of eliminating, not simply putting up with, the pain that their shoes caused (Asahara 2001). For manufacturers, which were confronting a saturated market for hygienic insoles, women’s interest in foot health pointed to the potential for a new market to exploit (Fuji Keizai 1999). FW press did its first feature issue on insoles and footcare goods in March 1999 (Sugawara 1999, 140–45). The articles quoted personnel from numerous manufacturers, wholesalers, and retailers, including Futoki Yabuki, director of customer-service operations at Morito, then the top insole manufacturer in Japan, who reported that the growing interest in foot health was fueling sales of walking-support insoles for women (Sugawara 1999, 140–45). The companies were anticipating sustained success (Sugawara 1999, 145). The walking-support insole market was in a sustained positive-growth cycle: anticipation of strong sales led manufacturers to introduce new products, whose ensuing strong sales led manufacturers to ramp up production of new products in more highly segmented categories, which led to an increase in the number of sales outlets (Asahara 2001, 104) and thereby drove market expansion.

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13 “Sandal, mule yō de juyō kakudai. Kaitekisei to oshare-kan ga shigeki suru” [Sandals and mules drive insole demand as consumers relish comfort and visual appeal], FW press (September 2004): 60.
(2) A shift from functionality to fashion in walking-support insoles
As the market grew, the emphasis of walking-support insoles shifted, and the way they were marketed changed. Early walking-support insoles emphasized functionality, with salespeople recommending products to customers based on their individual needs. Then, insoles prioritized fashion to attract customers in self-service settings by presenting their products as more accessible, “general-merchandise” offerings.

Sales shares by channel in the insole market in the 2000s reflect this shift. Shoe stores and department stores, which were the traditional channels for shoes with service by salespeople, saw their share of total sales decline, while drugstores—which had no connection to shoes and let customers seek out items on their own—carved out a larger share. Shoe stores accounted for 28% of all insole sales in 1999 but 24.3% of sales in 2010; similarly, department stores dropped from 6.7% to just 2.9% of total sales. In contrast, drugstores’ share jumped from 15.3% to 23.5%. There was also some shuffling in the insole sales rankings of manufacturers and import wholesalers (Figure 3). In 1997, all of the top three companies in sales made shoe stores their main sales channels, as all were long-standing manufacturers of shoe-related materials: Morito’s main products were snaps and hook-and-loop fasteners; Kihara’s were materials for shoe inserts; and Columbus’s were shoe polishes. All but Morito (number one in sales) saw their sales drop during the 2000s. On the other hand, companies that sold primarily to drugstores enjoyed the opposite upswing. Sales at Kobayashi Pharmaceutical and SSL Healthcare Japan, two such firms dealing in medicinal products and hygienic goods, climbed during the 2000s. While Kobayashi Pharmaceutical’s sales growth began to taper off after 2003, sales at SSL Healthcare Japan kept climbing.15

14 In 1999, shoe stores accounted for 30% of Morito’s insole sales, 40% of Kihara Sangyo’s sales, and 50% of Columbus’s insole sales (via direct sales or wholesaling). Department stores accounted for 10% of Morito’s insole sales and 18% of Columbus’s insole sales (Fuji Keizai 2000, 141–42).

15 SSL Healthcare Japan has undergone several name changes as the result of mergers and acquisitions by its parent company. Since the organization was established as Scholl Japan in 1988, it has gone by the names “Seton Scholl Japan” (from 1998 to 2000), “SSL Healthcare Japan” (from 2000 to 2010), and “Reckitt Benckiser” (since 2010). For the sake of simplicity, however, I use the name SSL Healthcare Japan to refer to the organization throughout the paper.
Figure 3: Trends in insole sales by manufacturers and wholesalers

Source: Fuji Keizai. Toiletry goods marketing yōran [Toiletries marketing directory] (Tokyo: Fuji Keizai, 1999, 123; 2000, 140; 2002, 154; 2003, 139, 140; 2005, 122; 2006, 112; 2007, 112; 2010, 123; 2011, 119). Note: Data for 2007 is unknown.

These changes took place at the same time as the concept behind walking-support insoles went from a focus on functionality to an emphasis on fashion value. With walking-support insoles initially centering on functional value, the products—and their names—emphasized that attribute. Products from the top three highest-selling companies in 1997 certainly did: Morito’s “Health Insole,” Kihara Sangyo’s “Keikai Hokō” (“Light Walk”), and Columbus’s “Healthy Arch Insole” (Fuji Keizai 1999, 126). The insoles featured uneven surfaces to provide sole support (Fuji Keizai 1999), and many had beige color schemes to imitate the standard leather shoe insert. Morito, Kihara Sangyo, and Columbus were all manufacturers of shoe-related materials, which meant they all had strong connections with shoe stores and department stores (either directly or via wholesalers)—and, in turn, shipped substantial portions there. At these types of outlets, personal sales were the norm. Thus, salespeople selected insoles based on individual customer needs and sometimes even made basic modifications to the insoles to fit the customers’ feet, although the insoles were ready-made, non-customizable insoles (Asahara 2001; Fuji Keizai 1999). Because this approach to selling insoles went well at shoe stores with SFs on staff, such stores purchased insoles from the big three (Asahara 2001; Sugawara 1999) and took part in manufacturer-organized training workshops on insoles (Fuji Keizai 2000).

However, the release of Morito’s “Non-Slide” insole in 2000 sparked a market transformation. In the second half of the 1990s, the women’s-shoes segment saw sandals and mules begin to grow in

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16 “Mono ryūkō: Kutsu no nakajiki, tōmei de medatazu danryokusei mo,” 16.
publicity. Pumps were already hard for wearers to make fit snugly, given their instep instability, but sandals and mules made a proper fit even harder. Sans both a toe cap and a heel cap, sandals and mules caused wearers’ feet to slip forward when walking, which led to painful blisters. Morito, figuring that a partial insole at the forefoot could help wearers avoid the pitfalls of the most popular shoes on the market, decided to develop a new insole to meet certain conditions: a material capable of stopping feet from slipping, made thin to avoid tightening the shoe, and transparent in order to be inconspicuous when the wearer took off her shoes. The material that satisfied all those requirements was silicone, which Morito used to create the transparent, 0.7-mm Non-Slide insole. The company then began to test-market the product in 2000 at the Hankyu Department Store in Osaka and the Tokyu Hands (a variety store) location in Nagoya. The test products at Tokyu Hands Nagoya garnered significant media attention, making appearances on talk, news, and variety shows that profiled the insoles’ ability to safeguard against slippage in mules and sandals. With anticipation building nationwide, Morito ramped up production of the Non-Slide and launched the insoles full-scale in the summer of 2001. The effort was a success out of the gate; sales of the Non-Slide topped 300,000 in year one because of the media coverage. However, media coverage also brought something Morito had never anticipated: miscellaneous-goods companies that dealt in everyday household items and hygienic products noticed the pervasive media presence and seized on the opportunity to enter the insole market.

The success of the Non-Slide grabbed the attention of more than just miscellaneous-goods companies, however. The first firm to pounce on the opportunities that Morito’s success had created was Arakawa Sangyo, a dealer in shoe-related materials. Creating an insole and turning it into a marketable product entails the time-intensive process of developing metal molds for production, but Arakawa Sangyo had an edge that other companies did not. As a member of the shoe industry, the company got word almost instantly from its clients that the Non-Slide was performing well and inventory was running low. Moving quickly, Arakawa Sangyo set out to develop transparent silicone insoles that could fill the Non-Slide shortage. The result was the “Jewelry Soles,” which the company debuted in February 2001. Although it circulated in department stores, a more traditional sales channel, the Jewelry Soles managed to carve out its own identity and differentiate itself from the Non-Slide by also incorporating the fashion element. From their glittery accents and pastel color lineup (purple, pink, green, gray, and clear) to their cute, eye-catching packaging, the insoles leaned into the “Jewelry” name. Jewelry Soles resonated with young women with their approachable, “accessory” quality, right in line

For example, see “Kakato no takai sandal, ‘mule,’ onnagokoro no ashimoto tsukamu—kiji, iro hōfu ni” [Mules, or high-heeled sandals, sweep women off their feet in a variety of materials and colors], *Nihon Keizai Shimbun* evening edition, April 22, 1997, 16.

Yamazoe Hitoshi (MD Section, Retail Products Sales Division, Morito Japan Co., Ltd.), in an interview with the author, May 17, 2021.

Ibid.

“Morito, mule ya pumps no maesuberi-bōshi pad, ‘Non-Slide’” [Morito releases the “Non-Slide,” a pad to prevent slippage in mules and pumps], *FW press* (August 2002): 60.

Ibid.

Yamazoe, interview.

It took at least six months to launch new insoles. Maeda, interview.

Maeda, interview.
with Arakawa Sangyo’s clear intentions to target that segment, and sold over 300,000 pairs in their first year on sale. The company had also been importing items from the Tacco Insole Series, which offered functionality-first insoles for people with flat feet, bowlegs, or knock knees, from Germany since 1997. Arakawa Sangyo made a clear distinction between those existing products and its new offerings; it defined a “Pure Functionality” product category for its functionality-oriented German imports and a “Sense and Feel” category for fashion-first items like Jewelry Soles.

Following up the successes of the transparent insoles from Morito and Arakawa Sangyo, an influx of new market entrants in subsequent years intensified the competition. According to Morito, 14 companies, comprising not only shoe-related manufacturers but also miscellaneous-goods (everyday household items and hygienic goods) manufacturers, entered the market in just the one-year period from 2001 to 2002 following the fashion-focused orientation pioneered by Arakawa Sangyo's Jewelry Soles. The biggest latecomer success story was SSL Healthcare Japan (Figure 3), which had previously focused on high-functionality footcare products like bunion pads under the Dr. Scholl’s brand name. That all changed in 2004, however, when the company began rolling out fashion-oriented transparent insoles for sandals, mules, and pumps. The “Party Feet” brand, one of SSL Healthcare’s lineups, had a name that invoked a festive, glamorous feel and a packaging design featuring delicate and sweet imagery of high-heeled shoes and mules against a lavender background.

As a hygienic-goods company, SSL Healthcare Japan shipped Party Feet primarily to drugstores. Sales of the company’s insoles appear to have grown in parallel with the drugstore channel itself—but not all manufacturers saw their performance emulate the prosperity in the drugstore market. Kobayashi Pharmaceutical, which had been using drugstores as its main channel, actually saw its insole sales start to sag in 2003 (Figure 3). Having established a position as the purveyor of Odor-Eaters, a major brand in the hygienic insole segment, Kobayashi Pharmaceutical did not introduce any transparent insoles in the 2000s. The fact that the drugstore-focused insoles of Kobayashi Pharmaceutical lost steam in the 2000s suggests that Party Feet’s success stemmed from more than the growth of the drugstore channel alone; the nature of the products themselves also played an important role.

From Morito’s perspective, the majority of the insoles from latecomer firms were completely different from their own—except for being transparent. Morito’s aim was to craft an insole with a minimal effect on shoe size, so it needed as thin a material as possible. The company thus decided to

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25 "Arakawa Sangyo, ‘Jewelry Soles’ to ‘Tacco insoles’ de kaisō,” 21.
26 "Arakawa Sangyo, sandal no suberidome sheet ‘New Jewelry Soles’ o 12-shoku de tenkai” [Arakawa Sangyo to roll out New Jewelry Soles, its new sandal non-slip sheets, in 12 colors], FW press (June 2003): 27.
27 "Arakawa Sangyo, ‘Jewelry Soles’ to ‘Tacco insoles’ de kaisō,” 21.
28 "Arakawa Sangyo, sandal no suberidome sheet ‘New Jewelry Soles’ o 12-shoku de tenkai,” 27.
29 Yamazoe, interview.
30 “Mono ryūkō: Kutsu no nakajiki, tōmei de medatazu danryokusei mo,” 16: “Tsumasaki dake no nakajiki, Dr. Scholl’s (shin seihin)” [Dr. Scholl’s (new), the toe insert], Nikkei MJ, July 15, 2004, 11.
31 “Tsumasaki dake no nakajiki, Dr. Scholl’s (shin seihin),” 11.
32 “Drugstore jittai chōsa: sōuriagedaka wa 4% zō no 5 chō 4430 oku en—tenposū, uriagedaka tomo zōka tsuzuku” [Drugstore study: Store count and sales continue to climb, with total sales up 4% to 5.443 trillion yen], Yakujinippō, March 17, 2010, https://www.yakuji.co.jp/entry18544.html.
33 Yamazoe, interview.
34 Ibid.
go with silicone, available in thicknesses of under 1 mm, for the Non-Slide. On the other hand, many of the newcomers in the 2000s used elastomer. Though considerably thicker (several mm thick), elastomer was much cheaper than silicone, and sacrificing thinness for cost was a non-issue for many of the new players. Coming from the miscellaneous-goods segment, proper shoe fit was not the top priority for latecomers as they designed their products.\(^{35}\) Cost concerns were far more important, so the inexpensive elastomer alternative was their material of choice. Moreover, the companies not only opted for the cheaper, thicker material but also reframed the added thickness as “extra cushioning”\(^{36}\)—and thereby spun what would normally be a negative into a perceived positive. Cushioning is essentially irrelevant to preventing foot pain when wearing high-heeled shoes like mules, pumps, or sandals; what an effective insole actually needs is anti-slide performance, as blisters arise when the foot slides forward.\(^{37}\) In this regard, Morito’s Non-Slide was of high quality.

However, as even developers at Morito recognized that the Non-Slide had been a “half success, half failure,”\(^{38}\) the product opened the door for latecomer companies to stake out larger shares of the market. With the entry of miscellaneous-goods companies, the sales floor for walking support insoles shifted from shoe retailers and department stores with sales staff to self-service drug stores and variety stores. Thus, selling the products became a challenge for Morito. There was virtually no way for Morito to reach customers with detailed explanations of the functional advantages in the self-service settings of variety stores and drugstores.\(^{39}\) Miscellaneous-goods companies staked their successes on presenting their products with attractive designs, packaging, and naming—and still maintaining a semblance of functionality in the form of a comfortable foot “feel” through “extra cushioning.” They knew how to resonate with the market.\(^{40}\)

Despite the lack of specific statistical data on transparent insoles, there is little question that the boom in the fashion-oriented transparent-insole segment reignited and sustained momentum in a women’s insole market that had been stagnant since the turn of the century, as shown in Figure 2 (Fuji Keizai 2007, 2010).\(^{41}\)

However, the spread and popularization of transparent insoles diverged from the original vision of JIF, which launched SF training. As transparent insoles solidified their place in the market, people saw the products as means of eliminating the pain of wearing pumps, mules, sandals, and other shoes with high heels. However, the JIF has consistently recommended that people vary their footwear according to setting and situation due to the added load on the foot that wearing high-heeled shoes for extended periods of time can cause (Japan Institute of Footwear 1988, 1992), regardless of whether the wearer uses insoles or not. In terms of foot health, then, wearing high-heeled shoes with transparent insoles is actually a practice to avoid. Dr. Kōichi Kondō, the director of a foot clinic in Ryōgoku (Tokyo), also explains the potential dangers. “When it comes to wearing insoles, doing things your own

\(^{35}\) Ibid.

\(^{36}\) “Mono ryūkō: Kutsu no nakajiki, tōmei de medatazu danryokusei mo,” 16.

\(^{37}\) Moreover, elastomer is not shock-absorbing, although it is soft to the touch; for shock-absorbing functions, other materials are more suitable. Yamazoe, interview.

\(^{38}\) Yamazoe, interview.

\(^{39}\) Ibid.

\(^{40}\) Ibid.

\(^{41}\) “Mono ryūkō: Kutsu no nakajiki, tōmei de medatazu danryokusei mo,” 16.
way can restrict the space inside your shoes and lead to foot problems,” he says. “People should understand that insoles just provide temporary relief to certain symptoms. What people should really focus on is choosing the right shoes.”

IV. Conclusion and discussion

This paper focused on conditions prior to product rollout (Kirsch et al. 2014), looked at the interpretations of a variety of actors, and examined the sequences of their activities (Nakagawa et al. 2014; Shimamoto 2001) to paint a clearer historical picture of how the transparent-insole market developed, going beyond the existing argument holding that the transparent-insole market grew on the strength of products that correctly identified and met existing consumer needs. The chain reaction of activity involved numerous players and steps. The JIF championed a focus on shoe functionality over shoe fashion and began to train SFs. In turn, growing numbers of SFs helped foster a stronger awareness of foot health among the consumer population. As more and more consumers began paying attention to their feet, insole manufacturers noticed the potential for demand and started rolling out products—and those products used the fashion element to cultivate consumer interest, thereby culminating a string of actions by insole manufacturers that ultimately shifted the focus of the insole market from functionality to fashion. That entire sequence of actions spurred the growth of a market for transparent insoles as fashion items, running counter to the JIF’s focus on the functionality of shoes and foot health.

The findings in the paper represent a step forward in previous research on the history of the shoe industry. Prior studies have shown that the shoe industry, a subset of the larger clothing industry, also began to exhibit some of the characteristics of the medical and health industry in the 1980s (Miura 2019). However, the case study in this paper points to how challenging it was for the shoe industry to make a substantial move toward medicine and health. Although walking-support insoles strode into the market against the backdrop of increasing health consciousness, they ultimately became a greater success only after adopting an identity as accessories in the miscellaneous-goods mold—essentially proving that, in the end, entrepreneurs and consumers alike saw shoes and their related products as fashion items squarely within the clothing category. Consumers indeed became more conscious of their health, no longer willing to simply put up with foot pain as an inevitability. Even so, heightened foot-health consciousness did not so much replace or even weaken the fashion dynamic in the shoe field. Rather, it simply brought the new element of functionality to exist alongside fashion. With that dynamic in place, shoes remained squarely within the clothing industry.

At the same time, the paper also points to how incorporating elements from the medical and health-related fields has the potential to lead to unique market opportunities in any industry, not just shoes. Consumers in aging societies, like Japan’s, are bound to be fertile markets of demand for products with health benefits. The transparent-insole market expanded thanks to products that offered more fashion value than their predecessors did but also maintained the functionality of providing comfort. In that development, one can see how products that incorporate even a small degree of health-oriented benefits have the potential for widespread market acceptance.

42 Ibid.
43 Ibid.
Furthermore, the paper contributes to studies on the consequences of social movements. Studies on social-movement dynamics have posited that new markets arise as the results of activism (Briscoe & Gupta 2016; Soule 2012). The existing research has illustrated a pattern where a social-action group sets out to change the awareness and behavior of certain consumers and entrepreneurs, and the corresponding changes create markets that align with what the group was championing (e.g. Sine and Lee 2009; Weber et al. 2008). For instance, Sine and Lee (2009) explained that environmental social movement organizations affected the emergence of the US wind power sector. However, this paper profiled a case in which the activity of a social-action group spawned a market that actually went against the group’s aims. The JIF did succeed in transforming the consciousness and behavior of their targets, namely shoe retailers and consumers, by making SFs a prevalent part of the larger industry picture. Out of that context came an emerging market opportunity that insole companies promptly reacted to and took in a different direction. The actions came in sequence, one after the other, gradually steering the insole market toward a focus on fashion—not the focus on functionality that the JIF had envisioned. Essentially, a social-action group set out with an intention; entrepreneurs in the market responded by pinpointing new chances to exploit outside that target scope; and they then proceeded to interpret the situation and take a series of successive actions. What came out of that process was the opposite of the market that the social-action group had intended to cultivate. Hiatt, Sine, and Tolbert (2009) noted that successful social activism is highly influential and could produce unintended consequences for them, but scholars have paid less attention to that idea. In line with this point, the paper has addressed how the actions of entrepreneurs connected in sequence to steer the resulting market away from the group’s target direction. This paper thus opened the black box between the activity of a social-action group and unintended market emergence by focusing on the chain of actions over an extended period of time.

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