

FOR IMMEDIATE RELEASE

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## Dentsu Conducts Japan Brand Survey 2018

Dentsu Inc. (Tokyo: 4324; ISIN: JP3551520004; President & CEO: Toshihiro Yamamoto; Head Office: Tokyo; Capital: 74,609.81 million yen), conducted the “Japan Brand Survey 2018” in 20 countries and regions<sup>1</sup> from January to February 2018 as part of its business related to the overseas development of “Cool Japan” products and services utilizing Japan’s culture and strengths.

This survey, conducted by the Company-wide project “Team Cool Japan,” has been ongoing since 2011 while expanding into new target areas, increasing sample numbers and adding new questions. The survey aims to accumulate detailed data and knowledge regarding the degree of familiarity with (and goodwill toward) Japan, intentions of traveling to Japan, areas visited and reasons why, as well as interests, concerns and impressions of Japanese products. The results of this survey are used by Japanese companies operating overseas as well as domestic companies developing tourist support businesses in Japan.

This latest survey was expanded from the previous version conducted in 2017 with the addition of questions corresponding to the ongoing rise in inbound tourist demand while increasing the number of countries and regions sampled. Furthermore, with regard to the United States, which is one of the countries targeted in this survey, the East and West coastal regions were separated from the previous survey to provide a more detailed analysis focusing on four separate regions in that country.

Looking at the cumulative results of surveys from past years, Taiwan, Thailand, the Philippines and Vietnam were all tied in first place as “Countries/regions that like Japan” (Reference data (1)). Once again this year, the Philippines ranked highest in terms of intention to visit Japan, with Asian countries occupying the top positions (Reference data (2)).

In addition, for the second year in a row, survey respondents indicating they wanted to “visit many places to take photos to post on social media” ranked third in terms of trip style, with trends such as “photogenic” and “looks good on Instagram” appearing in the scores (Reference data (3)).

This release focuses mainly on newly added items and the three most significant findings understood for the first time in this latest survey.

1. 20 countries and regions: China (Group A = Beijing, Shanghai, Guangzhou; Group B = Shenzhen, Tianjin, Chongqing, Suzhou, Wuhan, Chengdu, Hangzhou, Dalian, Xian and Qingdao); Hong Kong; Taiwan; South Korea; India; Singapore; Thailand; Indonesia; Malaysia; Vietnam; the Philippines; Australia; the United States (Northeast, Midwest, South, West); Canada; Brazil; England; France; Germany; Italy; and Russia.

## Major Findings

1. **Airbnb and private residences are popular types of accommodation among people from the ASEAN region. People in Asia demonstrate a strong intention to visit regional areas of Japan, thus Airbnb and private residences potentially hold a key to revitalization in regional urban areas.**

### ■ Types of accommodation

- As for the types of accommodation visitors want to use in Japan, the highest ranked were budget hotels, followed by ryokan (Japanese inns), first class hotels, Airbnb/private residences and capsule hotels.
- By region, first class hotels had the highest response in North America, ryokan (Japanese inns) had the highest response in Europe and budget hotels had the highest response in Asia (Reference data (4)).
- The intention to stay at an Airbnb/private residence, which are attracting attention from around the world, was highest among people in Asia and the ASEAN region. The number of travelers staying at an Airbnb, which is representative of so-called private residences, has been increasing every year since 2014 when the service was launched in Japan, with the number of properties in Japan reaching 51,000 (Source: Airbnb Japan survey 2017).
- In this latest survey, over 30% of respondents indicated they wanted to use Airbnb/private residences while in Japan. Regarding the ASEAN region, from which travelers to Japan are expected to increase going forward (especially those from Thailand and Malaysia), over 40% indicated an interest in Airbnb/private residences. We expect the number of people using Airbnb/private residences to continue increasing from here on out.
- Compared to people in North American and Europe, people in East Asia and the ASEAN region showed a stronger intention to visit regional areas in Japan, thus it is surmised that the number of visitors from Asia to regional areas in Japan will increase going forward (Reference data (5)). In addition, as Airbnb/private residences, which are popular with people in Asia, will become an increasingly important type of accommodation for regional areas in particular, it is highly likely that they hold a key to revitalization in regional urban areas.

- 2. The U.S. South, West and Northeast have an affinity for Japan and the strongest intention to visit Japan. In all regions, “eating Japanese food” was the top activity in Japan. Items ranked second or lower were shown to differ by region.**

- **Comparison of four U.S. regions<sup>2</sup>**

- Differences between U.S. interior and coastal regions have been made clearer through the most recent presidential election. Accordingly, this survey analyzes four regions: South, West, Northeast and Midwest, to more thoroughly understand the different values in each region as well as differences in attitudes and awareness regarding Japan.
- Of the four regions, the West had the highest affinity for Japan, as seen in more than 75% of responses. Next, in order, were the South, Northeast and Midwest. The lowest score was the Midwest, remaining at just over 50% (Reference data (6)).
- Of the four regions, the intention to visit Japan was strongest in the South, West and Northeast, each solidly trending over 60%. However, the Midwest tended to be lower at under 50% (Reference data (7)). Looking at overseas travel experience, 70–80% of people in the South, West and Northeast had experience traveling overseas, while the Midwest was lower at just over 60%. In addition to an affinity for Japan, it appears that awareness and interest in overseas travel also has an impact on these differences.
- In terms of interests and concerns with respect to activities in Japan, “eating Japanese food” was top in all regions. Items ranked second or lower were shown to differ by region (Reference data (8)).

- 3. The impressions of “Made in Japan” included “high-technology,” “high-performance” and “trustworthy.” On the other hand, many people indicated they placed importance on “environmental and social considerations” when making purchases overseas, with “SDGs” as one keyword.**

- **Impressions of Japanese products**

- The top three impressions of “Made in Japan” were “high-technology,” “high-performance” and “trustworthy.” As in the previous year, impressions of “Made in Japan” were overwhelmingly positive compared to “Made in Korea” and “Made in China.” However, “Made in Korea” was close in terms of “stylish” and “popular,” while “Made in China” had a slight advantage in terms of “popular” (Reference data (9)).

## ■ Overseas consumer purchase emphasis and the “SDGs”

- Inquiring about what is important when purchasing products in different categories, “product is of good quality” was the common response in product categories such as food and beverages, laundry machines, air conditioners, refrigerators and other home appliances, menstrual products, disposable diapers and other sanitary products, and laundry detergents, shampoo and other toiletries, thus we can expect the aforementioned strengths of “Made in Japan” to shine through. On the other hand, with regard to sanitary and toiletry items, emphasis on whether a “product is developed with regard for the environment and society” ranked among the top three concerns (Reference data (10)).
- In recent years, the Sustainable Development Goals (SDGs) are frequently mentioned when discussing social issues. In this latest survey, the average rate of recognition of the SDGs in the 20 countries and regions was 56.1%. As a reference, this is clearly higher than the SDG recognition rate in Japan (14.8%) according to a survey on awareness of the SDGs in Japan<sup>3</sup> conducted by Dentsu. Furthermore, in terms of the thoughts and actions of those who are aware of the SDGs, the top three responses were “I agree with the intent of the SDGs,” “I believe the SDGs will come to play an important role globally” and “I choose products and services from companies involved with the SDGs” (Reference data (11)). In addition, compared to people with a low affinity for Japan, people with a high affinity for Japan also had a high awareness of the SDGs, clearly indicating that, going forward, Japanese companies developing business overseas should emphasize the importance of the SDGs.

2. The four regions are categorized according to those used by the U.S. Census Bureau: Northeast, Midwest, South and West.
3. A survey conducted in Japan by teamSDGs, a Dentsu Company-wide project aimed at adoption of the SDGs in Japan. The survey was conducted in February 2018 targeting a total of 1,400 men and women between the ages of 10–79 across Japan. This number is for reference purposes only because it differs from the Japan Brand Survey in that it does not establish income conditions for the survey respondents.

## Japan Brand Survey 2018 Summary

- Objective: To ascertain overseas consumer awareness and attitudes toward all aspects of the Japan brand, from food and tourism, to Japanese products.
- Targeted areas: 20 countries and regions  
 China (Group A = Beijing, Shanghai, Guangzhou; Group B = Shenzhen, Tianjin, Chongqing, Suzhou, Wuhan, Chengdu, Hangzhou, Dalian, Xian and Qingdao); Hong Kong; Taiwan; South Korea; India; Singapore; Thailand; Indonesia; Malaysia; Vietnam; the Philippines; Australia; the United States (Northeast, Midwest, South, West); Canada; Brazil;

England; France; Germany; Italy; and Russia.

- Survey method: Online survey
- Targeted respondents: 20–59 year old men and women in the middle-income group or higher\*
  - \* Definition of middle-income group (income conditions): Conditions established for each country based on average incomes and socioeconomic conditions (SEC) in each country according to OCED statistics and other data.
- Sample numbers: China = A/B 300 people each, totaling 600 people; United States = 600 people; other regions = 300 people each for a total sample size of 6,600 people.
- Survey duration: January 12 to February 16, 2018
- Conducted by: Video Research Ltd.

**Reference: Regions Targeted in Japan Brand Survey 2017, 2016, 2015 and 2014**

- ◇ Japan Brand Survey 2017 (Conducted from February to March 2017)  
20 countries and regions: China (Group A = Beijing, Shanghai, Guangzhou; Group B = Shenzhen, Tianjin, Chongqing, Suzhou, Wuhan, Chengdu, Hangzhou, Dalian, Xian and Qingdao); Hong Kong; Taiwan; South Korea; India; Singapore; Thailand; Indonesia; Malaysia; Vietnam; the Philippines; Australia; the United States (East Coast, West Coast); Canada; Brazil; England; France; Germany; Italy; and Russia.
- ◇ Japan Brand Survey 2016 (Conducted from April to May 2016)  
20 countries and regions: China (Beijing, Shanghai); Hong Kong; Taiwan; South Korea; India; Singapore; Thailand; Indonesia; Malaysia; Vietnam; the Philippines; Australia; the United States; Canada; Brazil; England; France; Germany; Italy; and Russia.
- ◇ Japan Brand Survey 2015 (Conducted in April 2015)  
20 countries and regions: China (Beijing, Shanghai); Hong Kong; Taiwan; South Korea; India; Singapore; Thailand; Indonesia; Malaysia; Vietnam; the Philippines; Australia; the United States; Canada; Brazil; England; France; Germany; Italy; and Russia.
- ◇ Japan Brand Survey 2014 (Conducted in April 2014)  
18 countries and regions: China (Beijing, Shanghai); Hong Kong; Taiwan; South Korea; India; Singapore; Thailand; Indonesia; Malaysia; Vietnam; the Philippines; the United States; Brazil; England; France; Germany; Italy; and Russia.

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**[Reference Data]****(1) Affinity for Japan Ranking Top Ten****Q. Do you like Japan?**

Five responses: Yes, very much; Yes, somewhat; Can't say either way; I don't really like Japan; I don't like Japan at all

Ranking	2018	2017	2016
1	Taiwan, Thailand, the Philippines, Vietnam	Thailand, the Philippines, Vietnam	Thailand
2			Vietnam
3			the Philippines
4			Singapore, Malaysia
5	Hong Kong		
6	Malaysia	Taiwan	
7	Hong Kong	Malaysia	Hong Kong
8	India, Singapore	Indonesia, Russia	Taiwan, India
9			
10	Indonesia	India	Indonesia, Brazil
	Italy	Singapore	

**(2) Intention to Visit Japan Ranking Top Five****Q. Do you plan to travel to Japan within the next year?**

Four responses: I plan to travel to Japan within a year; I would like to visit Japan, but I haven't decided when; I have no plans to travel to Japan at all; I'm not sure

Ranking	2018	2017	2016
1	the Philippines	the Philippines	Thailand
2	Hong Kong	Vietnam	Singapore
3	Thailand	Thailand	Hong Kong
4	Vietnam	Malaysia	Indonesia
5	Taiwan	Singapore	Malaysia

**(3) Style of Travel on Japan Trip****Q. Please choose something close to the trip style you would like to try.**

Multiple responses

Ranking	
1	I want to visit the major tourist spots
2	I want to do what is popular to do among locals
3	I want to create memories through experiences with family, friends and acquaintances
4	I want to stay in a guesthouse or other private residence in which I can interact with the locals and feel as though I'm living there
5	I want to visit many places to take photos to post on social media

**(4) Type of Accommodation You Want to Use Ranking****Q. Please tell us what type of accommodation you prefer when visiting Japan.**

Multiple responses, experience visiting/intend to visit Japan

	Budget hotel	Ryokan (Japanese inn)	First class hotel	Airbnb or private residence	Capsule hotel	Other
Asia	1	2	4	3	5	6
Europe	3	1	2	4	5	6
North America	2	3	1	4	5	6

**(5) Intention to Visit Regional Japan Ranking****Q. Do you want to visit the regional areas of Japan?**

Five responses: I really want to visit; I somewhat want to visit; Can't say either way; I don't really want to visit; I don't want to visit at all

Ranking	
1	ASEAN
2	East Asia
3	Europe
4	North America

**(6) Affinity for Japan: Comparison of Four U.S. Regions****Q. Do you like Japan?**

Five responses: Yes, very much; Yes, somewhat; Can't say either way; I don't really like Japan; I don't like Japan at all

South	70.7%
West	76.0%
Northeast	66.0%
Midwest	52.7%

**(7) Intention to Visit Japan: Comparison of Four U.S. Regions****Q. Do you plan to travel to Japan within the next year?**

Four responses: I plan to travel to Japan within a year; I would like to visit Japan, but I haven't decided when; I have no plans to travel to Japan at all; I'm not sure

South	60.7%
West	62.7%
Northeast	60.7%
Midwest	48.7%



**(8) Interests/Concerns Regarding Activities in Japan Ranking Top Five: Comparison of Four U.S. Regions**

**Q. What do you want to do and where do you want to visit in Japan?**

Multiple responses, experience visiting to Japan

Ranking	South	West	Northeast	Midwest
1	Eat Japanese food	Eat Japanese food	Eat Japanese food	Eat Japanese food
2	Enjoy sightseeing in natural and scenic spots	Walk around downtown city areas	Drink Japanese alcohol (such as sake and shochu)	Enjoy sightseeing in natural and scenic spots
3	Walk around downtown city areas	Enjoy sightseeing in natural and scenic spots	Walk around downtown city areas/Enjoy the night views	Walk around downtown city areas
4	Experience the traditional culture of Japan (tea ceremony, flower arrangement, etc.)/Enjoy sightseeing at historical sites and buildings	Drink Japanese alcohol (such as sake and shochu)/ Shopping		Enjoy sightseeing in natural and scenic spots
5				

**(9) Impressions of Made in Japan, Made in Korea, Made in China: Top Three and "Stylish," "Popular"**

**Q. What kind of impression do you have when you hear the words "made in XXX (the name of the following countries; Japan, Korea, China)"?**

Multiple responses

Ranking	Made in Japan	Made in Korea	Made in China
1	High-technology: 50.3%	High-technology: 26.5%	Simple: 24.3%
2	Trustworthy: 43.6%	Popular: 24.6%	Popular: 21.0%
3	High performance: 43.3%	Trustworthy/Stylish: 22.5%	Familiar: 19.0%

9	Popular: 24.5%
15	Stylish: 21.4%

**(10) Emphasis on Purchase Importance by Category****Q. Please specify the things you value when purchasing those products.**

Multiple responses

Ranking	Foods and beverages	Washing machines, air conditioners, refrigerators, and other appliances	Sanitary products including disposable diapers	Toiletries such as laundry detergents and shampoo
1	Product is of good quality	Product is durable and lasts a long time	Product is of good quality	Product is of good quality
2	Product is affordable	Product is of good quality	Product is affordable	Product is affordable
3	Product brand is one I like	Product is useful	Product is developed with regard for the environment and society	Product is developed with regard for the environment and society

**(11) SDGs Actions: Based on SDGs Awareness****Q. What is your awareness of the SDGs and what actions are you taking towards them?**

Multiple responses

Ranking	
1	I agree with the intent of the SDGs
2	I believe the SDGs will come to play an important role globally
3	I choose products and services from companies involved with the SDGs
4	I spend/have spent a lot of time studying the SDGs
5	It is easy to trust or like companies that are pursuing the SDGs