

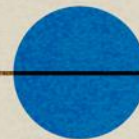
Japan Brand Image Research

Survey on Japan's Brand Image from the Perspective of Overseas Cities

How Japanese culture is perceived in major overseas cities;
Results of field studies in London, New York, Berlin, Paris and Singapore

2023/3/28

Research and Report by BIOTOPE Corporation

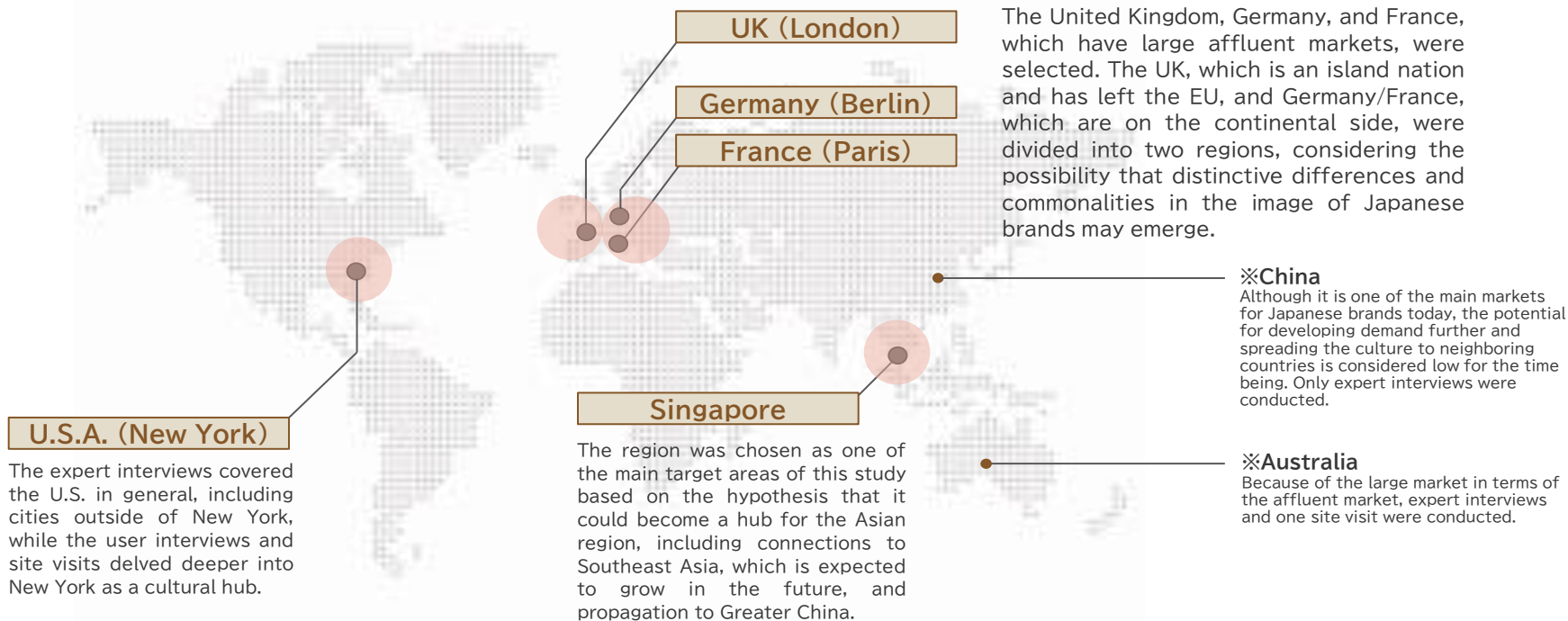


Project Summery

Business Objectives	<ul style="list-style-type: none"> ● To understand the source of recognition, image, and appeal of Japanese brands to people around the world, which is the gateway to developing overseas demand, not from the Japanese perspective, but from the perspective of experts familiar with the overseas situation and local users. ● In addition to the current brand image, we will clarify what is expected of Japan in the future, potential value and demand, issues related to improving the Japanese brand in each country, necessary functions, key persons, etc. Identify areas of opportunity for the re-creation of the Japanese brand and its brand building in order to capture overseas growth markets in the mid- to long-term.
basic policy	<ul style="list-style-type: none"> ● Surveyed Area The survey will focus on five cities in four regions (London, Berlin/Paris, New York, and Singapore) where the affluent market is particularly large and demand for Japanese culture is expected to grow. China is also a strong market in Asia, but through preliminary research with experts and others, it became clear that it would be difficult to link the survey results to demand development, so Singapore was selected as a hub for connecting to Southeast Asia, where future growth is expected, as well as for propagation to Greater China. ● Surveyed population As inbound demand expands, the “modern luxury segment” of the world’s affluent population with a high interest in culture is increasing*, and it is expected that a broader segment of the population will have similar aspirations in the future. In this study, we surveyed users who were born and raised in the study area or have lived there for more than 10 years, have annual household incomes above the city average, and share values (e.g., authenticity, emphasis on experiences, sustainability orientation) with the modern luxury segment. *The Japan National Tourism Organization (JNTO) defines the new “modern luxury segment” as a group of affluent travelers with a mindset that seeks culture and authentic experiences. It states that this segment is continuing to expand. (JNTO, “Analysis of the Affluent Travel Market and Key Points for Creating Contents,” 2020)
Duties	<p>Qualitative research was conducted on how Japanese brands are viewed from overseas, using a design research approach, a method for gaining a deep understanding of users’ perspectives. Specifically, a global team of Japanese researchers living overseas was formed to conduct interviews with 12 experts in Japan and overseas, on-site surveys at 17 Japanese brand outposts, interviews with 22 overseas users (customers of Japanese brands), and social media research.</p>

Countries surveyed

In this study, four regions and five cities (London, Berlin/Paris (Continental Europe), New York, and Singapore) were selected based on a comprehensive assessment of the size of the affluent market, propagation of impact to surrounding areas, and potential for growth in demand development.



Basic Policy for Project Implementation, Description of Work, etc.: Overall Picture of Work

Expert Interviews

●Online Interview

We interviewed 12 experts with knowledge of Japanese brand communication overseas.

The experts' places of residence were not limited to the five cities surveyed, but focused on those who could provide a bird's-eye view of Japan as seen from overseas. The interviews focused on the evolution of Japan's image over the past decade and its future prospects, as well as current initiatives and challenges.



User Hearing / Site Visit

●Home visit or online interview

A total of 22 local users interested in Japanese brands were interviewed in New York, London, Berlin, Paris, and Singapore, using keywords and visuals representing images of Japan, either through home visits or online formats.

By observing the spaces where the subjects live, we gained a deeper understanding of the users' preferences and values. In addition, in order to elicit images of Japan that the users themselves could not fully express in words, we asked them to prepare several photographs representing their images of Japan to provide clues for the interviews.

●Site visit

In order to confirm how Japanese brands are being promoted overseas, we visited 17 Japanese brand promotion centers in New York, London, Berlin, Paris, Singapore, and Sydney, and conducted observation surveys of their operations, visitors, and so on.



Online image survey

Based on the results of expert interviews and user interviews, keywords (Kawaii, Kintsugi, Japandi, Umami, Ikigai, etc.) that contribute to the image of Japanese brands were extracted. We also investigated the growth in the number of searches on Google for keywords that have become established or are spreading in the Romanized form of the Japanese word, and which we interpreted as indicating that the product or concept they represent is in a trend of spreading or becoming popular overseas.

We also compiled search results on Instagram in order to understand how these keywords are spread visually online and with what kind of images.



*Details of the online research were removed from the public version due to copyright concerns.

Drafting of a quantitative survey

The final report includes basic policies and proposed survey items in anticipation of a more detailed quantitative survey to be conducted in the future to increase demand for Japanese brands.



Executive Summary

What kind of brand image does Japan have abroad?

What makes Japan's image unique compared to others?

What are the opportunities and challenges to improve Japan's brand image and increase demand from overseas?

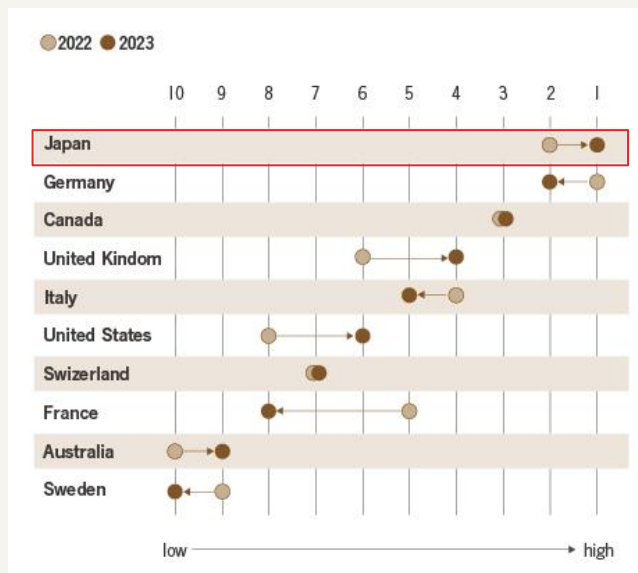
1. Quantitative Evaluation of Japan

Japan's Nation Brand Index ranks No. 1, and Japan's soft power is recognized worldwide.

In the Ipsos Nation Brand Index (NBI) released by Ipsos in November 2023, Japan moved from second place until 2022 to first place.

The reason for this is trust and uniqueness, which have a lot to do with the fact that Japan ranked first in two of the “Attributes of Common Interest” shown on the right, which affect a country's reputation. These are “I trust products made in this country” and “This place is different from any other place.”

【 National Brand Index 2023 】



【 Attribute of common interest 】

Top 3 Countries Ranking

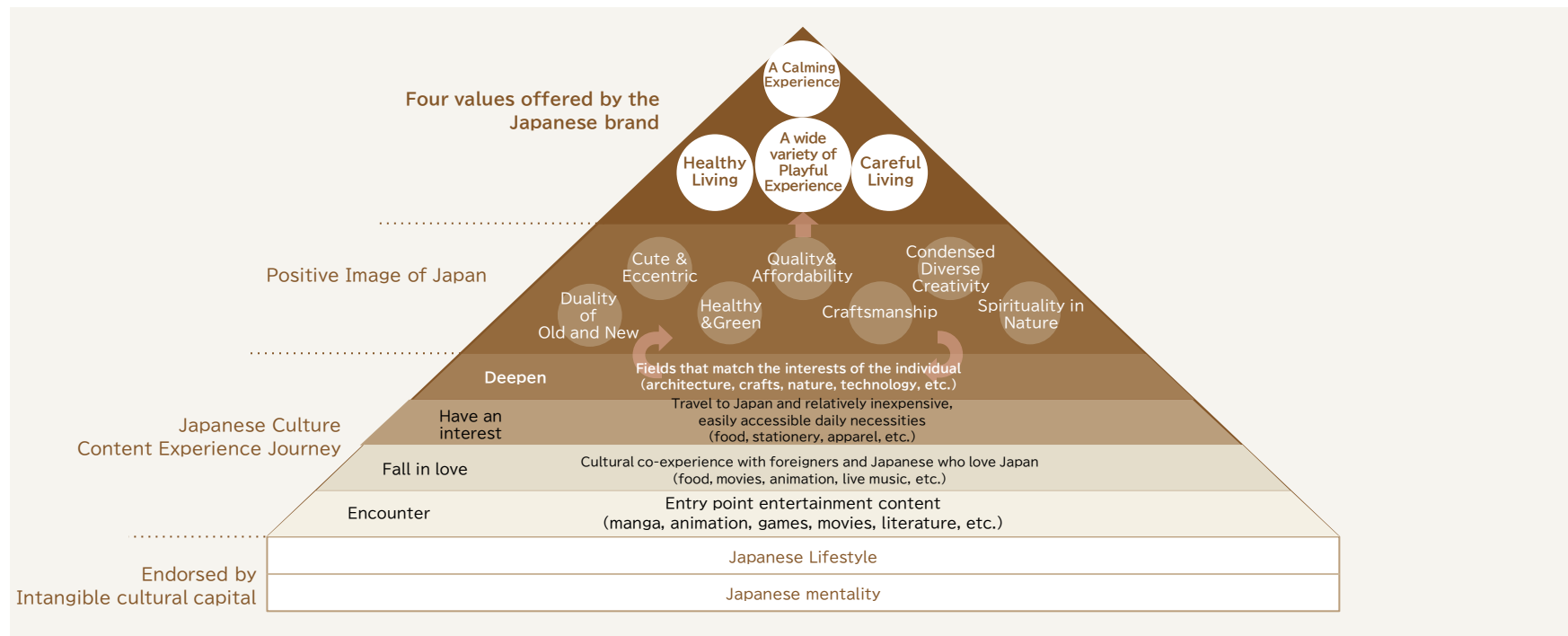
Attribution	3rd	2nd	1st
I trust the products manufactured in this country	USA	Germany	Japan
I see this country as a global economic leader	Germany	Japan	USA
Food in this country is delicious	Spain	France	Italy
This country is honest about its own past	Canada / Norway / Scotland	Sweden	Switzerland
I would feel safe in this country	Norway	Canada	Switzerland
This place is unlike any other	Italy (T-2)	Egypt	Japan

※New attributes are not included in the calculation of the NBI index.

Source: Anholt-Ipsos Nation Brand Index (NBI)

2. overall picture of the lessons learned through this survey

The Japanese brand for foreigners can be represented by a layered structure. Positive images are formed through step-by-step encounters with the Japanese mentality and diverse cultural content based on lifestyle, ultimately resulting in four offered values.



3. How is Japan viewed by foreigners?

- 1** Japan has gone from a uniform image of “traditional culture (Mt. Fuji, Geisha, etc.) and POP culture such as manga, anime, and video games” to a diversified and deepened interest in a number of fields.

【Japanese cultural content as a point of contact and level of interest in Japan 】



While the content of contact points varied from person to person, as engagement with Japan increased, interest in Japanese food and sake, architecture and crafts, tools, fashion, spirituality, natural scenery, and the outdoors tended to deepen.

Interest in Japan Low←→High

3. How is Japan viewed by foreigners?

- 2 With the increase in the number of visitors to Japan in recent years, the development of video platforms, and the overseas expansion of Japanese restaurants and daily necessities brands, the number of points of contact has increased, and the image of Japan from the foreigner's perspective has become more resolved and diverse with keywords being raised.

【 Seven keywords that describe the image of Japan 】

"Japan is a rare country where both traditional culture and modern, new culture coexist. Few countries have a new culture based on tradition."

Duality of Old and New

#Kyoto #TeamLab
#Robot Restaurant
#Shinkansen
#Nostalgic #Futuristic

"Japanese anime and POP culture is unique, with areas of cute and quirky styles."

Cute & Eccentric

#Kawaii #Perfume
#Harajuku #Akihabara
#Playful

"Japanese food is a premium food culture that is healthy, wholesome, and good for you, in addition to the ingredients being prepared with a lot of care."

Healthy & Green

#vegan/vegetarian
#Creative Japanese chefs
#Fermentation

"Speaking of Japan, the quality of goods and services is good and the value for money is overwhelmingly high."

Quality & Affordability

#UNIQLO #Muji
#Convenience store
#Ramen #stationery
#Ramen

"Japanese things are well intended and thorough down to the smallest detail."

Craftsmanship

#traditional crafts #knives
#stationery
#ceramics #tea culture
#fashion
#carpentry
#building

"When you go to Japan, you can find all kinds of niche and interesting things in all kinds of fields, and they are all concentrated in a small country."

Condensed Diverse Creativity

#Niche #Variety
#Transculture

"Japan has abundant natural resources, especially in rural areas, and the mind is conditioned through walking and physical exercise in nature."

Spirituality in Nature

#Fuji #Zen #Pilgrimage
#Trail #Retreat
#Teaceremony #Onsen

3. How is Japan viewed by foreigners?

Duality of Old & New: Combining History and Modernity

#Kyoto #TeamLab #Robot Restaurant #Shinkansen #Nostalgic #Futuristic

"It is a rare country where traditional and modern cultures coexist, as represented by the phrase "old meets new."

Traditional Culture:

A typical stereotype of Japan is the image of traditional culture of cityscapes with old architecture such as temples, shrines, and Buddhist temples, such as Mt. Fuji, Geisha, and five-story pagodas. Areas with old Japanese cityscapes are popular and have value due to the accumulation of a sufficiently long time, especially from the perspective of countries with long histories, not to mention countries with younger histories such as Australia, the U.S., and Singapore.

Contemporary Culture:

Japan's popular culture is spreading abroad in a variety of areas as people become familiar with Pop culture such as manga, anime, and video games, Japanese food, and apparel brands such as Uniqlo and Muji. When visiting Japan, people have a futuristic impression through the experience of seeing skyscrapers and huge screens with projected advertisements in Tokyo and the other cities and traveling by Shinkansen bullet train.

The coexistence of these traditional and modern cultures in one country in a good balance is highly valued, and Japan is perceived as a country that is good at utilizing its traditions and adopting new ones at the same time.

In addition, in the past few years, there has been a growing interest in not only the good parts, but also what is happening in contemporary Japanese society, how it is changing, how the Japanese people are living and what social issues they are facing. For example, in Singapore and Germany, where the birthrate is declining and the population is aging, some are looking to learn from the Japanese example.



image

Duality of Old & New

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Like the scramble crossing in Shibuya, it's colorful and gaudy. There is a Zen aesthetic that goes too far, and a quiet, minimalist aesthetic.

People who know only one side are surprised to learn about the other.
(DE)

“

How does a culture that has been around for centuries apply to modern life? Many people are interested in this point.
(UK)

“

Examples of old meets new include Kabuki featuring, Hatsune Miku and the Pokemon exhibition (a collaboration between Pokemon and craft artists) held at the National Crafts Museum in Kanazawa.
(UK)

“

It is not anime, traditional culture, or samurai, but something that is happening right now in the realities of modern society and daily life. Interest in such things is growing in France.
(FR)

“

Voices of Overseas Experts

3. How is Japan viewed by foreigners?

Cute & Eccentric: Cute and quirky

#Kawaii #Perfume #Harajuku #Akihabara #Playful

Anime and Pop culture is cute, quirky and unique in style.

Pop culture, represented by manga, anime, and video games, has gone from being the preserve of a few Otaku to being widely known to the public through the Internet (YouTube, Netflix, and specialized sites like Crunchroll in the US).

And from manga and anime, people learn about Japanese food and lifestyles, and this has become a gateway to interest in Japanese culture and interest in Japanese food and general lifestyle and culture. Japanese content conveys the Japanese way of life, and people overseas perceive this in a positive way as a good thing. Some of the manga are written by local people themselves, and they are becoming receptive to Japanese culture and creating their own.

Also, as a fashion preference, Harajuku pop,

Kawaii culture represented by colorful images, is also accepted by a certain segment of the population, with pink hair, etc. forming a free and eccentric image. There is also the appeal of entering a virtual world where people want to cosplay a particular anime.

On the other hand, in Europe, especially in Paris and Berlin, one can find people entering Japanese culture from sources other than so-called Pop-style anime, such as subculture, social and literary anime and manga, and socially-oriented movies.



Store in Harajuku



Robot restaurant

Cute & Eccentric

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In Japanese animation, a part of the world that cannot be described in terms of dualism, such as Oni and yokai are becoming more popular. Oni, which cannot be translated into English, have a good side and they never settle for just being bad guys. Fuzzy and complex characters. In America, due to weakening of the community and the church, more people sympathize with the world view of Ghibli and the other who are tired of dualistic values..
(US)

“

The gender of Japanese manga and anime, and their universality and acceptance that transcends partisanship, are particularly popular among the younger generation in America.
(US)

“

The keyword “Playful” is used for Japanese products. They come up with playful ideas and things that have never been done before. (Pokemon, Ghibli, stationery, cartoon containing Edo period laughter)

The culture of drawing deformed pictures with a sense of style has been around since the days of Ukiyoe making, and this has led to the Playful Japanese creativity of today.
(UK)

“

In Australia, One Piece, Dragon Ball, Sentai Mono are popular among young people. Cosplay is especially popular and fashionable.
(AUS)

“

Voices of Overseas Experts

3. How is Japan viewed by foreigners?

Quality & Affordability: Great value for the quality.

#UNIQLO #Muji #Convenience store #Ramen #Stationer

Good quality of goods and services and overwhelmingly high value for money.

MUJI and UNIQLO have expanded the brand worldwide, and it has become a leading Japanese brand recognized for its balance of high design quality and affordability.

Other than that, several users mentioned the experience of Japanese products, such as stationery, cooking utensils, and cosmetics, which are of significantly better quality and last longer than Western brands, and many people feel that they are good value for money.

This is also the image that visitors to Japan have in general when purchasing products in Japan under the recent depreciation of the yen. In particular, the experience of eating delicious, high quality Japanese food, such as ramen and udon noodles, which are popular overseas, at low prices leaves a strong impression.

Japan has some of the world's most unique convenience stores, where some were amazed at the experience of being able to buy overwhelmingly high-quality items in a cheap, compact store.

In addition, Japanese high fashion is highly regarded in fashion-sensitive cities such as Paris and Berlin. Comme des Garçons, for example, is respected as a long-lasting brand with high quality in both design and durability.

Secondhand clothing is becoming popular in Europe, especially from the perspective of environmental awareness. It should be noted that Japanese used clothing is becoming very popular because of its high durability, good storage conditions, and high quality, even when used. It is also worth mentioning that Japanese used clothing is becoming very popular because of its high durability and good storage conditions.



User's favorite stationery

Quality & Affordability

“Various things, including traditional things, are of high quality. That is the image of Japan today. If you buy something made in Japan, 99% of the time, it is known to be of high quality.”
(FR)

“High street brands are significant in the formation of a positive image of Japan. MUJI and UNIQLO are favored for their balance of high design quality and affordability.”
(UK)

“Voices of Overseas Experts

3. How is Japan viewed by foreigners?

Healthy & Green: Healthy and Green

Matcha #Vegan/Vegetarian #Creative Japanese Chef #Fermentation #Free Vegetables

From the limited image of Japanese food = Sushi, Japanese food has become a healthy, delicious, and premium food culture.

Japanese food is becoming the strongest content to spread the Japanese brand image to the public. Research shows that the number of Japanese restaurants abroad has increased 6.6 times worldwide from 2006 to 2021*. Health factors include high quality and freshness of ingredients, good source (origin of ingredients), and clean cooking methods (less processing). It is also strongly related to sustainability from the perspective of using all the ingredients. In Europe, the topic came up more in the context of the deliciousness of the taste itself and in the context of vegetarianism and veganism, rather than in terms of health.

Popular Japanese foods such as Matcha, Ramen, Bento box, Onigiri, Katsu curry, Izakaya, Yuzu, and Dashi and ways to enjoy Japanese food are expanding as healthy variations of Japanese food.

Japanese food itself is gaining attention as a very varied food culture.



image

In particular, Sashimi and Umami are food cultures that until now were considered incomprehensible to Westerners are rather becoming more prevalent as upscale experiences. They are paying for a premium experience that includes the hospitality offered at the Omakase counter.

In addition, Japanese chefs and sushi chefs have become a high-status profession, and a restaurant with a Japanese chef is an upscale and creative experience; the term Omakase, a course prepared by a chef for a small group of customers, has boomed in upscale restaurants in New York and Sydney, among others.

Healthy & Green

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In New York, Japanese food has become a trend: national chains such as Yoshinoya and Ippudo, are teaming up with famous chefs, and treating food as an investment business. As needs are becoming more segmented, Japanese food is gaining an image of variety.
(US)

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*What is your image of Japanese food?
The image of Japanese food is that it is “healthy,” “delicious,” and “safe”. It is comfortable but new. And it has created a sense of “it hits the sweet spot!”*
(AUS)

“

Voices of Overseas Experts

* Source:

Export Planning Division, Export and International Affairs Bureau, Ministry of Agriculture, Forestry and Fisheries Approximate number of Japanese restaurants overseas:
https://www.maff.go.jp/j/shokusan/eat/attach/pdf/160328_shokub-8.pdf

3. How is Japan viewed by foreigners?

Healthy and Green:

With the boom in Japanese food, Sake is becoming a standard category of sake to pair with Japanese cuisine, in addition to Beer, Wine, and Whiskey. Whiskey, especially Yamazaki, is becoming popular among the wealthy as a luxury drink. Some said that Japanese Cocktails are attracting attention because of the growing popularity of sake as a spirit.

As a trend, it should not be overlooked that variations in the way it is served are emerging. In addition to the upscale hospitality of Omakase, the range of offerings has expanded from premium to



image

the public offerings such as Kaiseki (Kaiseki cuisine), Teishoku (Teishoku), Izakaya (Izakaya), etc.

In addition, according to experts, 80% of Japanese restaurants overseas are operated by foreign managers and serve locally customized tastes and styles.

Localization and fusion with local food culture is becoming a new culture, and in trendy cities such as New York, the central issue is how to create fusion and differentiate oneself while pursuing universal deliciousness.

In addition to food, there were also references to a healthy image shared among people in the U.S. and Australia. They travel to Japan is like visiting a theme park (well-being park) where one can feel most at ease both physically and mentally. This image is based on Japan's safe, secure, and respectful national character, the elements that make the mind (spiritual experiences such as pilgrimage and Zen, design, and architecture) and body (hot springs, healthy Japanese food, and sports such as skiing) healthy, and the lifestyle of the Japanese, which is clean, less obese, and has a long life expectancy.

“

Sake, like Japanese food, has an image of being good for one's health, and people are beginning to drink Sake with Japanese food. Some are even becoming certified sommeliers and making cocktails (such as yuzu-shu cocktails) using Sake. Hojicha is also gaining attention among chefs.
(AUS)

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It's not so much localization as fusion, with a little twist. In Singapore, green tea called "Hvala Ichijikkai" and matcha fusion from "Matchaya" have become popular.
(SGP)

“

Voices of Overseas Experts

3. How is Japan viewed by foreigners?

Condensed Diverse Creativity: A variety of creativity is packed into a single space.

#Variety #Four Seasons #Transculture #Niche

When you go to Japan, you can find all kinds of niche and interesting things in every field, and they are concentrated in a small country.

Japan, originally perceived as exotic and unfamiliar to foreigners, has captured the hearts of people with the discovery that the more one learns about it, the more diverse its culture is. Many people, including experts and users, said that the more they learned about Japanese culture, the more they appreciated its diversity and the variety of goods and experiences that exist in a compact country and space. Another reason why Japanese food has become so popular around the world is the rich variety it offers.

Travel to Japan is often thought of as a special and unique experience, with a variety of climates from tropical to northern, as well as four distinct seasons. Travelers who have experienced standard routes such as Tokyo-Kyoto-Takayama-Kanazawa,

there is a trend to focus on regions (e.g., Aomori, Morioka, Shikoku, Kyushu) that are more natural and retain the good qualities of ancient Japan.

What people are looking for in a trip is not just visiting tourist attractions, but staying at a lodge on Koyasan, mountain biking in the midst of spectacular mountain scenery, participating in rice planting, visiting an artisan's workshop, joining a seine fishing trip, or engaging in sake brewing. Rare experiences that can only be had with local people are turning into value.

Even in China, where visa and other restrictions make it difficult to make Japan a travel destination, cultural tours that allow visitors to actually experience and learn about design from Japan are beginning to gain a certain level of popularity, known as "deep tours."



Sound recording experience in Yakushima by users

Condensed Diverse Creativity

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While Europe is homogenized, the experience in Tokyo is not. While you will see the same brands, the same chain stores, and the same font logos whether in Paris or Berlin, there are many stores and specialists in niche areas, whether it is kitchen knives or anything else. That is why some people go to Tokyo just to visit a bookstore, or a chef for a specific kitchen appliance.
(UK)

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The strength of Japanese food is its variety.
(US)

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Within a small country, widely different places, from Okinawa to Hokkaido, Japan's influence is greatly enhanced by the fact that it is a small country with widely different locations from Okinawa to Hokkaido. While it would take years to see China, Japan can be seen in a few weeks. It is also significant that you can enjoy the Shinkansen bullet train on your travels.
(UK)

“

Japan is not only Niseko. Japan is the only country where monkeys and bears live together in any prefecture. It is a small country. There can be attractions all over the places. It is less unsafe, less dangerous, safer, and you can enjoy the outdoors in a beautiful natural setting.
(US)

“

Voices of Overseas Experts

3. How is Japan viewed by foreigners?

Craftsmanship

#traditional crafts #knives #stationery #ceramics #tea culture #fashion #carpentry #architecture

The image of high-tech is a thing of the past, and craftsmanship is highly regarded as one of Japan's strengths.

In the past, Japan was famous for its high technology, represented by TOYOTA and SONY, but today its technological image is not as strong as before, and environmental technology is cited as a strength in the high-tech field.

On the other hand, so-called low technology, or handwork and craftsmanship, is highly regarded as one of Japan's strengths. In both the U.S. and the U.K., Corona has triggered a psychological need to rethink one's way of life and to live a careful life in which the temperature of one's hands can be felt. There is a growing appreciation for crafts such as Hida Takayama woodwork, Tsubame-Sanjo hardware, Nanbu ironware, ceramics, and tea caddies. Kintsugi (metal-joining) is popular in Europe, and the philosophy of accepting imperfection and making broken things usable for a long time is gaining sympathy, linked to a growing awareness of sustainability in response to climate change.

Tools are also popular. Kitchen knives have become a product that people go out of their way to buy when they travel to Japan to visit the production area, and there are many high-quality gardening tools and other products in Japan. In addition, stationery commonly sold in Japan is recognized as being of high quality, and this is a field with great potential worldwide.

In addition, Japanese architecture, especially famous contemporary architects such as Kengo Kuma, Shigeru Ban, and Sousuke Fujimoto, are very highly regarded worldwide. Techniques such as remodeling by reusing originally used materials (e.g., the ceremonial relocation of the Ise Jingu shrine) and carpentry techniques that do not use screws or nails for joints are attracting attention as being sustainable from the perspective of utilizing limited resources.

In the field of interior and spatial design, "Japandi," a style that fuses Scandinavian and Japanese design without excessive decoration, and that takes advantage of the quality of materials, is popular among middle-class and affluent consumers, and Japanese crafts and products that suit their tastes will continue to be sought after.

Craftsmanship

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In Japanese Culture, The relationship between things and people is still very unique. In the UK, Kimono (Kimono) The physical beauty is there, but the philosophy of why they accept the scar is shared as well.
(UK)

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In England, the Corona disaster led to a prolonged urban blockade. In contrast to the affluence of a life in which we have access to so many things at any given time, there is a new focus on a way of life that values what we have. The Japanese people's attitude to cherish what they have is now attracting new attention. The Japanese attitude of valuing things is of global interest.
(UK)

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Overseas designers, creators and artists collaborating with them is a good way. Japanese traditional and contemporary techniques and designs, ideas, local craftsmen and foreign designers are very interesting, and I think it is a modern approach in terms of creating an environment and process that inspires and fosters culture on both sides.
(FR)

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Mingei, lacquer, and other handcrafted designs are accepted in the United States. The slow life, time, and care that goes into making one's own things and living with things that convey the temperature of one's hands. There is a movement where Americans are picking up where the Japanese are throwing away at an accelerated pace.
(US)

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Voices of Overseas Experts

3. How is Japan viewed by foreigners?

Spirituality in Nature

#Fuji #Zen #Pilgrimage #Trail #Retreat #Teaceremony #Onsen

The values cultivated in the Buddhist way of thinking, which accepts and looks at the present as it is, and in the minimalist lifestyle of “less is more.”

Japanese spirituality has been the focus of much attention since the 2000s in the wake of Zen, and this attention has only grown stronger as the world has become more chaotic. In the U.S., people tired of the competition of excessive consumerism have adopted Zen meditation as a habit, and the Japanese garden experience, an expression of that worldview, has been favored as a kind of escape from reality.

Konmari=Marie Kondo, who became popular for her tidying up, is another example of the value of Japanese spirituality, which became popular as a counter to young people's values of having more and more things. This is an example of how Japanese spirituality has become a value, a popular counterbalance for young people who value having more.

This need is particularly strong in the U.S., where nature and society are divided, and in Australia, experiences such as the Shikoku pilgrimage as an activity are also attracting attention.

There is also a need among foreigners who have visited Japan many times to enjoy the rich natural environment of rural areas and country life. Since the natural scenery of Japan's rural areas is simply not communicated as an attraction, there is great room to create an image of “Japan = a place with excellent natural scenery” by communicating creative visuals.

Activities that cannot be experienced in one's own country, such as skiing and mountain biking against the backdrop of spectacular mountain scenery, trails and hiking in the ocean and forests, and other activities to feel and enjoy nature, have great potential for foreign tourists who are shifting toward more hands-on experiences.

Spirituality in Nature

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Christianity is a culture of duality. The majority is taken by the easy-to-understand value that the person who has more stuff wins. The spiritual escape route is a place to experience Zen and Zen as a way to save those who have been omitted from that competition where there is no place to go. The example of Mr. Konmari is another example of a professional cleanup crew coming in and cleaning up the mess, and what's the fun in that? It seems to me, but the strangeness of the mental structure is the sense that, as a social structure, we want to say goodbye to our exhausted mental parts.
(US)

“

Sports inbound, the unprecedented cycling boom. Surfing. I think sports inbound using Japan's nature will grow in the future.
(AUS)

“

I am thinking of doing a feature on the pilgrimage. I admire the image of Zen from a foreigner's perspective: Simple, but stoic and cool. I want to feel Japanese spirituality through the experience of shrines, temples, mountain asceticism, and zendo. Especially, walking experience x spirituality is interesting.
(US)

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Voices of Overseas Experts

3. How is Japan viewed by foreigners?

- 3** Aspects stemming from the conservative and rigid social structure and the specific experiences with Japanese people and travel to Japan that manifested themselves were cited as negative images. This poses a risk of declining demand for Japanese brands in the future.

【 Negative image of Japan 】	【 Specific experiences that formed the negative image 】	
Negative Image	Outbound Experience	Inbound Experience
1.Homogenized High homogeneity and low understanding of racism.	<ul style="list-style-type: none"> • Heard a podcast by a foreigner in Japan about bullying. 	<ul style="list-style-type: none"> • English was not understood.
2.Male-dominated Male dominance prevents women from playing an active role.	<ul style="list-style-type: none"> • Heard on the news that “Japan has a gender disparity problem.” 	<ul style="list-style-type: none"> • I was stared at on the train. • Refused to enter a restaurant or club.
3.Rigid Inflexible and lack of hospitality.	<ul style="list-style-type: none"> • Always difficult to buy Japanese goods from overseas. 	<ul style="list-style-type: none"> • I saw a woman being relentlessly accosted by a man on the street.
4.Hierarchical Hierarchy strongly unchallenged.	<ul style="list-style-type: none"> • couldn't get into my favorite artist's fan club from overseas. 	<ul style="list-style-type: none"> • Wi-Fi and rideshare were not available.
5.Bureaucratic Bureaucratic and slow decision making	<ul style="list-style-type: none"> • When I worked for a Japanese company, products were never launched. 	<ul style="list-style-type: none"> • Overtourism has not been resolved and there are still so many people.
6.Overworked overactivity	<ul style="list-style-type: none"> • I saw pictures of people sleeping drunk on trains and on the street. 	<ul style="list-style-type: none"> • I saw people in suits at a karaoke bar in the middle of the night.
7.Less-sustainable Low environmental awareness	<ul style="list-style-type: none"> • (Only in mainland China) I heard from the government that Japanese water and marine products are hazardous to health due to the discharge of treated nuclear water into the ocean. 	<ul style="list-style-type: none"> • Excessive packaging on merchandise.

“

There is a perception that J-pop and Japanese dramas have fallen behind Korea. It seems to be stuck at the time of "Ayumi Hamasaki."
(SGP)

“

Currently, Japan is positively evaluated, but it will be different if we look a little further into the future, say, 20 years from now. China is investing heavily in renewable energy and electric vehicles with respect to climate change. On the other hand, from a European perspective, Japan's strategy for decarbonization appears ambiguous.
(UK)

“

I think it is important to decide what kind of people by whom Japan wants to be visited. Right now, we are only chasing the number of people, but there is no need to accept everyone. Portland, U.S.A. is doing a good job.
 1. People interested in Japanese culture (architecture, design, fashion, bicycles, nature, water),
 2. people interested in craft, design, art,
 3. people who want to experience Wellbeing.
(US)

“

Since the environment is ever-changing, there is no general rule of thumb that says you should tune in this way. Rather, it is important to leave it free and go with a mindset that allows for flexibility.
(US)

“

Voices of Overseas Experts
 Japan Brand Image Research 18

4. The value that foreigners perceive Japanese brands to offer

Overall, through their contact with Japan, foreigners perceive **4** values offered by Japanese brands.

【 Four values that foreigners find in Japanese brands 】

Variety of Playful Experiences

As exemplified by anime, manga, and movies, Japan offers a wide variety of playful and creative content that is unique and elaborate from its own culture. Japan is also rich in variety, with diverse climates from tropical to snowy, and traditional experiences and modern ones packed into its small land area.

A Calming Experience

Japan is a place where one can obtain Comfortable and relaxing experiences in a stressful society. It offers the experience of pleasant travel in a peaceful and safe country, relaxing experiences such as hot springs, and experiences that appeal to the spirituality represented by Zen and pilgrimages.

Healthy Living

Japanese people have an image of longevity and few obese people. In this context, Japanese food, tea as represented by matcha (powdered green tea), and sake have formed a healthy and vegan/vegetarian friendly image, and a healthy lifestyle can be obtained.

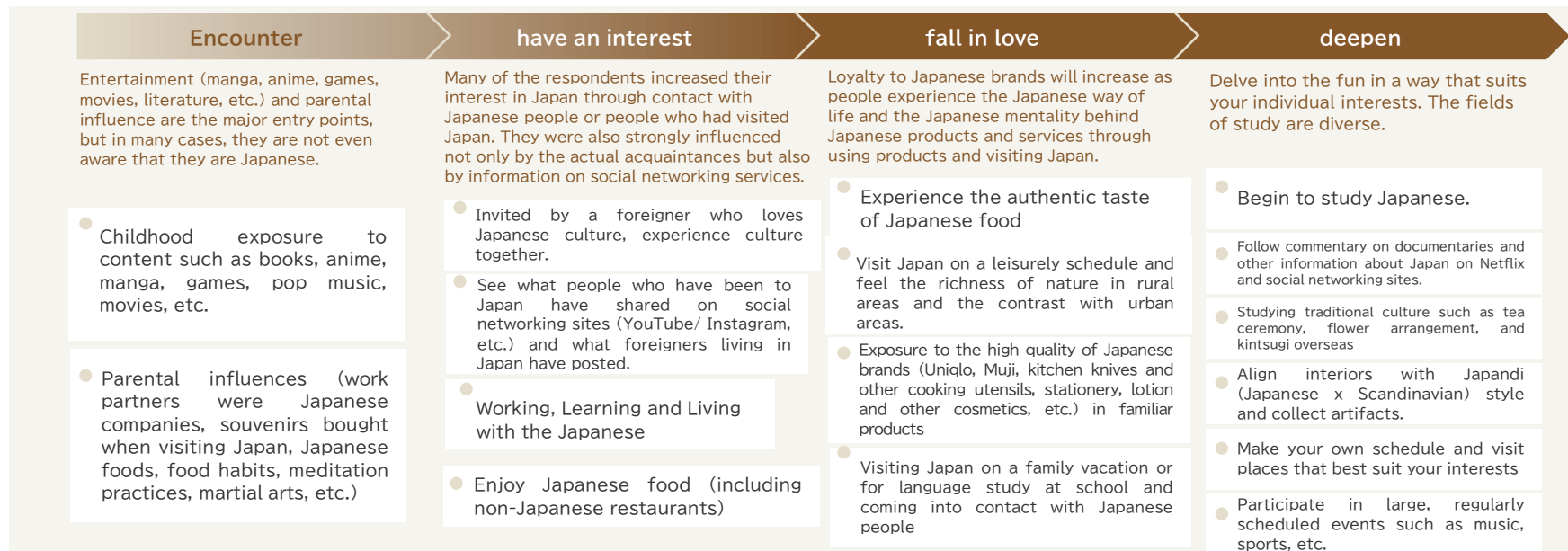
Careful Living

The idea of minimalist, refined Japanese living spaces and Scandinavian simplicity, such as Japandi, are integrated into a modern style that is popular. The concept of interior design is popular as a modern style.

5. What kind of experiences do foreigners go through to fall in love with Japan?

Overall, the results of the interviews with the 22 users indicate that the multilayered image of Japan is formed in stages: encountering, becoming interested in, liking, and deepening, through cross-disciplinary contacts with Japan from childhood.

【 Content Experience Journey of Japanese Culture 】

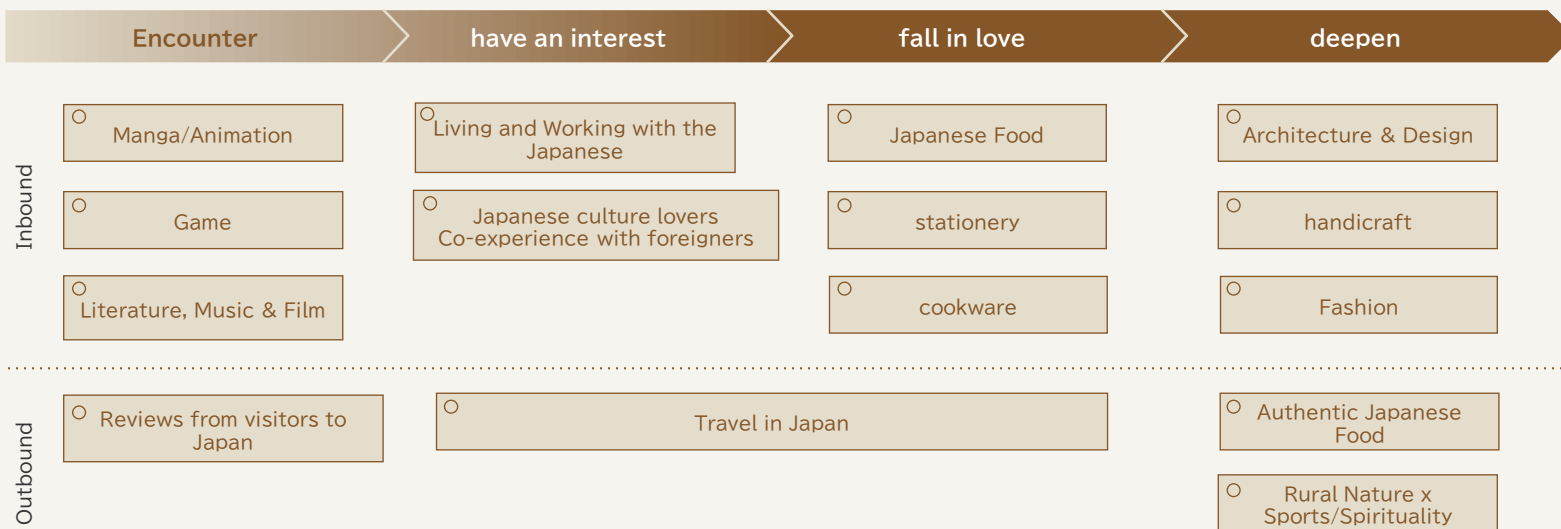


We saw a trend of people encountering Japan at a young age through anime, manga, games, and other content, becoming interested in Japan through the experiences of Japanese people and friends, falling in love with Japan through Japanese food and visits to Japan, and adopting and deepening the culture of Japan.

5. What kind of experiences do foreigners go through to fall in love with Japan?

The process of foreigners becoming fond of Japanese brands begins with manga, anime, games, and other content, and many become interested through contact with Japanese people and co-experience with foreigners who have experienced Japanese culture, and then become fond of Japan through visits to Japan and Japanese food.

【 Content Experience Journey of Japanese Culture 】



5. Japan Brand Engagement Wheels

Co-experiencing Japanese culture with foreigners who have experienced Japanese culture is the key to increasing engagement with Japanese culture.

The user research results showed that opportunities to listen to and co-experience Japanese culture stories had a significant impact on awareness of Japanese culture, brands, and product services, arousing interest, and fostering stronger engagement.

The key to increasing demand for Japanese brands is to further accelerate the engagement wheel by providing and supporting opportunities and scenes of co-experiencing Japanese culture and opportunities to talk about it, with foreigners and English-speaking Japanese/Japanese who have already experienced and enjoyed the value of Japanese culture as the central axis of the wheel. This is the key to expanding demand for Japanese brands.



【 Examples of opportunities and occasions provided/supported 】

- Provide and support scenes and opportunities to experience and enjoy casual Japanese cultural content such as home parties, tea ceremonies, secondary productions, live performances, and movies together locally.
- Provide opportunities, support initiatives, and conduct PR to get the word out about the value and attractiveness of Japanese culture, recommended experiences, and product services.
- To understand the values, brand image, and product services experienced and accepted by visitors to Japan, and to promote them and their value to inexperienced/unconscious/newcomers to Japanese culture.
- To further expand interest in Japanese culture and other product service areas among those who have experienced Japanese culture, as well as to propose local experiences to deepen their knowledge of Japanese culture, region, and knowledge in order to repeat tours to Japan, and to increase accessibility to local product services in their country of residence to expand Japanese product services.

6. Structure to create a Japanese brand image

Encounters with Japanese cultural content form the foundation of the Japanese lifestyle and underlying spirituality that we know from watching anime and manga and visiting Japan and form the value of a strong brand offering.

Value provided by Japanese brands	Variety of playful experiences	A calming experience	Healthy Living	Careful Living
Content Experience Journey of Japanese Culture	Encounter	Have an interest	Fall in love	Deepen (Ordinary)
	Film, Literature & Music	Living and Working with the Japanese	Japanese Food	Architecture & Design
	Manga/Animation	Co-experience with foreigners who love Japanese culture	stationery	handicraft
	Game		cookware	Fashion
	inbound			Deepen (Extraordinary)
	Reviews from visitors who have traveled to Japan	Traveling Japan		Rural Nature x Sports/Spirituality
				Authentic Japanese Food
Japanese Lifestyle	<ul style="list-style-type: none"> Safe Countries Clean country Civilized and sophisticated. Polite and well behavior! 		<ul style="list-style-type: none"> The one of overwhelming quality Water is clean and drinkable. Good fruits and vegetables (small-scale, hand-picked produce) The richness of nature that remains in rural areas 	
Japanese spirituality	<ul style="list-style-type: none"> Respect others: Altruistic and attentive to others Zen: Accept the present as it is, without trying to control it too much Imperfectionism: Accept imperfections and use what you have with ingenuity. 		<ul style="list-style-type: none"> Animism: Seeing God in Nature. Trying to keep nature close to us in our daily lives. Craftsmanship: A mindset called “<i>Dou</i>” that tries to make things better by going all the way. 	

7. How can Japan's brand image be linked to increased demand from overseas?

In considering a post-Cool Japan strategy, it is necessary to consider 1) setting targets that facilitate the propagation of Japanese culture, 2) investing in domains that better convey the appeal of Japanese culture, and 3) providing support to turn the image of Japanese culture that is improving overseas into business.

[Opportunity Areas in the Post-Cool Japan Strategy]

1

Define target

- Create a place where people can talk about their experiences in Japan and what they like about Japan, and where they can share their experiences with others around them. The key target will be foreigners of Japanese descent and those who have visited Japan and deeply experienced Japanese culture.
- Rather than chasing the volume of visitors to Japan, we will push the concept of cultural tourism more, targeting people who like Japanese culture and Japanese creativity.

2

Expanding the Japanese cultural domain

- Using anime, manga, and games as a gateway, shed light not only on contemporary lifestyle culture such as food and daily necessities, but also on past lifestyle culture (e.g., Showa retro).
- Stimulate demand for tools and crafts by expanding the culture of making Japanese food at home, not only at restaurants, but also by people overseas.
- Japan=Transmitting the appeal of nature. Transform nature into something that can be experienced, but not only as a landscape, such as nature x spirituality, nature x sports, etc.

3

Supporting Businesses

- Supporting cultural entrepreneurs who can create an authentic brand of Japanese culture that is gaining popularity overseas.
- Collaborate with overseas entrepreneurs, designers, and creators to support business development that can reach the non-Japan-loving volume segment in each region.
- Supporting partnerships with local producers and distributors to create an overseas distribution network for Japanese products.

7. How can Japan's brand image be linked to increased demand from overseas?

Value provided by Japanese brands	Key to Increased Demand	Specific opportunity areas for demand growth	
		Outbound	Inbound
Variety of Playful Experiences	Valorize and make accessible a wide range of content.	<ul style="list-style-type: none"> Creating mechanisms for people from overseas to join fan clubs and spread content around without worrying about copyrights. Using AI to disseminate local cultures and experiences in multiple languages 	<ul style="list-style-type: none"> To dig up and provide content from the past Japanese lifestyle and culture, such as Showa retro. A trip to experience how people in primary industries (agriculture, fishing, hunting, etc.) live and interact with nature.
A Calming Experience	Natural landscapes and food culture, spirituality, etc. Utilization of cultural assets	<ul style="list-style-type: none"> Providing learning opportunities to be able to cook Japanese food with ingredients from overseas Recipes and premium takeaways to enjoy with family and friends 	<ul style="list-style-type: none"> Promote health experiences that heal the body and mind, such as hot springs and sports in nature. Promote the rich natural attractions of rural areas (e.g., creative posters of national park scenery) and spiritual tourism.
Healthy Living	Including mental health. Experiences that lead to mental and physical wellbeing.	<ul style="list-style-type: none"> Development and maintenance of routes for global distribution of foodstuffs and cultural products. Platform for building and operating stores in Japanese and exporting overseas Launching and Valorizing the Creativity of Japanese Chefs 	<ul style="list-style-type: none"> Expansion of sports and outdoor activities in nature. To provide an opportunity to experience and incorporate tea culture, including its spirituality (brewing for people, looking at oneself, etc.), into one's life.
Careful Living	Enable overseas access to products, including information gathering and purchasing.	<ul style="list-style-type: none"> Culture classes taught directly in English by Iemoto and artisans (kintsugi, ikebana, Konmari (Marie Kondo's tidying up method), etc.) Branding of Japanese utensils (cookware, stationery, cosmetic tools, etc.) Tell realistic stories of traditional crafts, including social issues 	<ul style="list-style-type: none"> Cultural experience-based tourism to learn craftsmanship (learn from professionals, learn from other professionals) Promote Cultural travel (called Deep Tour in China) to learn crafts, design, architecture, art, etc.
overall commonality	Communicate the value of Japanese culture from local perspectives, including Japanese-Americans and foreigners who love Japan.	<ul style="list-style-type: none"> Training and support for personnel who can communicate products and services, including the spirituality behind them, based on an understanding of local social and cultural backgrounds Support for overseas expansion of human resources who can not only convey culture but also collaborate with local people and organizations, as well as entrepreneurs with a Japanese cultural theme Transmission using foreign influencers living in Japan Increase digital dissemination of Japanese content by using AI to translate it into other languages. 	<ul style="list-style-type: none"> Training of guides who can properly convey the background of the experience in English (or other languages) and securing income. Enhanced hospitality (non-manual service) for luxury. Make it easier to create contact with Japanese people in the community.

8. City-Specific Highlights: London

Japan Brand Image and Value

#Traditional & Advanced	Coexistence of tradition and cutting-edge London's emphasis on the preservation of old-fashioned streetscapes gives the impression of being more futuristic than modern, with skyscrapers and large screens everywhere, as is the case in Tokyo. At the same time, the fact that traditional techniques and culture are still alive in the same country, and that modern life remains in a good balance between the past and a grounded, modern lifestyle and cutting-edge technology is highly appreciated.
#Diverse & Compact	Diverse cities in a compact country. They enjoy the rich contrasts and characteristics of each region, such as urban and rural, snowy and tropical. Because of the distance to Japan, many visitors stay in Japan for several weeks at a time and visit multiple cities, experiencing the differences between cities even more vividly. People from diverse backgrounds have diverse hobbies and interests in London, and each person finds the place that best suits his or her interests.
#Niche & Deep	Pursuing a Field of Expertise. In a country effectively closed off by barriers such as language and customs, it is amazing to see how each person pursues his or her own area of expertise. Many restaurants in London offer a variety of menus in large groups, such as Japanese and Italian, but in Japan, there are stores specializing in even the smallest field of ramen. Even outside of food, the great attraction is the many variations of a single product at an electronics retailer, or the presence of specialists in niche fields, whether it is kitchen knives or electronic components.
#Cute & Playful	Playful Kawaii Culture with the wide acceptance of Ghibli and Pokemon, what was previously perceived as "for children" is now being embraced by an entire generation. The playful spirit unique to Japan, seen since the time of Japonisme, which was popular in the 19th century, has been carried over to today's yuru-chara characters, games, J-pop, and more. This is an approach where a little ingenuity enriches our lives and creates something interesting that has never existed before.
#Quality & Affordability	Producing high quality products with high technology and ingenuity. Japanese products are perceived to be of the right quality and worth the price, even if they are a little expensive. The biggest entry points are UNIQLO and Muji. It is surprising to find that even stationery products costing only a few hundred yen are made with a thorough focus on ease of use and functionality.

Opportunity Areas for Japanese Brands

Content required for Japanese culture

- Experiences that give a clear sense of the distinct characteristics of the region or city, such as local nature, local cuisine, traditional crafts, and elements swept into the urban area.
- Products and experiences that can be enjoyed with someone else, such as friends and family, rather than alone.
- Experiencing primary industries and livelihoods closely connected to nature (farming, fishing, hunting, etc.)
- A field where you can freely explore a variety of specialized fields for self-improvement, including work and academic pursuits.
- Sustainability-conscious enjoyment (e.g., slow travel by boat or train, vegetarian-friendly recipes, etc.)

Opportunities/touchpoints for people to recognize and like Japan

- Creation of community-based stores and galleries where people can feel connected to Japanese makers, curated to suit local London sensibilities.
- Communication that tells a realistic story, including current issues and negative history.
- Provide access to various Japanese fan communities from outside Japan (e.g., fan clubs for J-pop artists)
- A place to learn to use Japanese cooking utensils and foods (some of which have been purchased but not used).
- Using Japanese language learning as a gateway to a wide range of experiences in entertainment, food, etc. (The hurdle to learning multiple languages is low, but it is limited to free content such as watching YouTube videos).

Regional and national cultural and social background

1. respect for tradition and ethnic diversity

With a history of colonialism, the white population of London is less than half the population of the city, which is made up of immigrants from all over the world. The country's foundation is based on its rule as the British Empire, and traditional aspects of the city, such as the old-fashioned streets and the king's coronation ceremony, remain strong. While they find uniqueness in the Japanese culture nurtured in a highly ethnically homogeneous environment, they are sensitive to racist language and behavior.

2. uniform urban culture

Because the Industrial Revolution brought uniformity in all areas, the distinctive regional cultures such as local cuisine and traditional crafts of each region of the United Kingdom have not been inherited as much as in Japan. Even looking at the restaurants and apparel stores on the main streets of London, chain restaurants are the norm and there are few independent stores.

3. interest in sustainability and a preference for honest PR

Increased awareness of climate change has led many segments of the population, especially the younger generation, to make environmentally conscious choices. Vegetarianism (vegetarianism), not visiting museums that are unethical, using e-commerce to buy and sell recycled goods such as clothes, dishes, books, furniture and appliances, etc. Skepticism is emerging toward PR that focuses only on the positive aspects. It seems that communication that includes current issues is preferred.

8. City-Specific Highlights: Berlin-Paris (1)

Japan Brand Image and Value

(Commonality among Paris and Berlin)

#Detailed & Quality	<p>Quality & Functionality & Design & Attention to Detail</p> <p>High quality goods, spaces and services that encompass traditional craftsmanship, philosophy, wisdom and attention to detail with minimalist and functional design are highly valued. Comfort, ease of use, and sophisticated design bring a sense of specialness, attachment, and appreciation to daily life, and have an appeal that makes people want to use and spend a long time with them as an object, space, and spirit. Not only special items, but also affordable items such as Muji are gaining support, and people are beginning to incorporate them into their daily lives.</p>
#Transcultural & Specialized	<p>Diverse cultures interweave to create unique cultures and expressions.</p> <p>It is interesting and modern how the diverse cultures of Japan and other countries and regions are interwoven to create unique cultures and expressions. The attitude of pursuing even foreign cultures to a level of quality that surpasses that of the country in which they originated was also surprising. There is a great deal of respect and support from overseas artists, creators, craftsmen, brands, and manufacturers, and there are more and more examples of collaboration with Japanese craftsmen and factories with expertise, technical skills, and creativity.</p>
#Niche & Crazy	<p>Niche and sharp subcultures, social phenomena and expressions.</p> <p>There is a strong interest in niche and sharp subcultures, social phenomena, and expressions that emerge from a strict society that values rules, uniformity, and tradition: Neo Tokyo, cyberpunk, kawaii, pornography, yakuza, Internet culture, movies, games, anime, cosplay, robots, avatars, and more. The crazy ideas and expressions mixed with elements of Neo Tokyo, cyberpunk, kawaii, pornography, yakuza, internet culture, movies, games, anime, cosplay, robots, avatars, technology, retro, etc. are of interest, as is the social and cultural context behind them.</p>
#Tradition & Modernity	<p>Crossing tradition with modern methods and ideas</p> <p>As France is losing its traditional methods and philosophies of craftsmanship, handicrafts, industry, services, and customs of daily life, it is recognized as contemporary in the way they create methods, ideas, and expressions that combine technology, contemporary values, design, function, and use. The work is also of interest in its attitude toward evolution, including change, from a non-dualistic, intermediate point of view.</p>

Opportunity Areas for Japanese Brands

Content required in the region

(Berlin-Paris + Japan)

- Tend to like things with stories and details, and encounter Japanese vintage clothing, secondhand books, secondhand tools, crafts rooted in the region of origin, ceramics, incense, kitchenware, etc. (local niche stores, flea markets, select stores, etc.)
- Learn about niche subcultures and real Japanese society and lifestyle (not just mainstream culture, but also movies, anime, manga, art, movements, etc. that are more culture-oriented).
- Experiencing local people, culture, lifestyle, technology and creativity (farming and country life experience, workshops on tea, fermentation, ceramics, etc., residencies and programs to learn and collaborate with artisans, producers, creators, artists, etc.).
- Vegetarian and vegan-friendly recipes, cooking classes.
- Affordable and delicious Japanese food that is easy to incorporate into daily life, high-quality, functional and well-designed lifestyle, kitchenware, fashion, etc.
- Experiences and culture to enjoy and share with friends and family (cooking together, food, tea, sake, incense, movies, music, etc.).
- Knowledge of craftsmanship, lifestyle, and culture that is connected to nature and values sustainability.

(Japan)

- Sustainable means of transportation within Japan (especially in rural areas) (environmentally friendly trains, buses, bicycles, and rental cars that are easy to purchase and book in English).

Regional and national cultural and social background

(Commonality among Paris and Berlin)

1. Sustainability awareness and practice

Berlin has a strong culture of recycling and reuse (online platforms, flea markets, second-hand stores) such as second-hand clothes, second-hand goods, and DIY, and has one of the highest rates of vegan and vegetarian population in Europe, as well as a strong interest in locally produced, locally consumed, and organic products. In Paris, similar topics have become a trend in recent years, with an increase in such stores and products. There is also an increase in the practice of ingenuity to recycle materials, production, sales, and even disposal processes. From the perspective of climate change and animal protection, sustainable living and practices have grown from a trend to a standard awareness, especially among young people.

2. Awareness of multiculturalism, LGBTQ, social issues, etc.

Paris-Berlin, where immigrants, artists, and start-ups from various countries gather and people are highly mobile. Berlin has a negative history of post-colonialism, and Paris has a high level of interest in political and social issues and understanding and coexistence with diverse races (immigrants), ethnic groups, religions, genders, and sexualities, as well as discussions on civil (labor), women's, and immigrant rights, and activism and civic movements for minority rights. Exhibitions and other activities are also active. There is also a high level of interest in the current situation in Japan regarding similar topics.

8. City-Specific Highlights: Berlin-Paris (2)

Japan Brand Image and Value

(Paris)

#Nature & Spirituality	<p>A view of nature and spirituality that expresses circulation, symbiosis, and harmony</p> <p>People were attracted to Zen ideas, traditions and spirituality, architecture based on climate, feng shui, etc., tea ceremony, crafts, customs, and natural disasters that remind them of the existence of nature, and a worldview and spirituality that encompasses both people and nature. The recycling nature of materials already used in the fields of architecture, furniture, crafts, fashion, and ceramics, as well as the ability to reuse and regenerate materials by not using nails or harmful paints or parts, are also attracting attention.</p>
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(Berlin)

#High Sense Curation	<p>A curation that combines expertise and storytelling</p> <p>The participants were impressed by the total quality of the goods, spaces, and services offered by antique clothing, antique bookstores, record and music instrument stores, bars, restaurants, and coffee shops, all of which are specialized in their respective areas of expertise. Japan is recognized as a place where good things from all over the world come together, and where sophisticated curation and storytelling are added to create original experiences and value.</p>
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Opportunity Areas for Japanese Brands

Opportunities/touchpoints for people to recognize and like Japan (Berlin-Paris + Japan)

*A sense of curation (space) and presentation design are common to each of the following items.
design is important.

- Encounters with places that offer local Japanese food, quality, design, functional crafts, kitchenware, groceries, recipes and usage, background culture and ideas (in local niche stores, flea markets, select stores, etc., combining local climate and culture, artists/creators, craftsmen and Collaboration, workshops, and other hands-on experiences that connect with one's lifestyle and culture and that can be experienced through the five senses. The ability to purchase and experience at affordable prices is also a key point that makes it easy to incorporate into one's daily life. (In the case of food, the number of people who can enjoy the products will increase if there are vegetarian and vegan options.
- English (German and French) media introducing real Japan (niche and sharp underground culture, social phenomena, movements, and social issues) (not necessarily from Japanese, but familiar with those topics)
- Film, art and design exhibitions and symposium programs in collaboration with local cultural and arts organizations that allow visitors to experience subcultures and social phenomena such as those mentioned above.
- Residencies and programs to learn and collaborate with Japanese craftsmanship, crafts, design, food, producers, and creative artists
- People who have come into contact with Japanese culture through friends, family, partners, etc., and are deeply interested in Japan, as well as Japanese people living locally, are also evangelists who convey the appeal of Japan to the people around them. Create opportunities for these people to further convey the appeal of Japan (opportunities to come into contact with Japanese culture, goods, and services in their daily lives, such as those listed above, through which they can enjoy themselves together and deepen their interest).

Regional and national cultural and social background

(Paris)

Respect for tradition, aesthetics and quality and the widening gap

Paris is a city where quality and sensible goods and culture based on tradition, expertise, aesthetics, and philosophy (specialty stores for food, fashion, and crafts, marchés, flea markets, art galleries and museums, good old movie theaters, cityscapes, etc.) are deeply rooted in daily life. In addition to the deep historical ties with Japan, the city has a high degree of familiarity with and respect for Japanese culture, including food, crafts, fashion, architecture, movies, design, manga, animation, art, Zen, and nature, from the perspective of sensitivity, thought, and aesthetics, and is highly popular and respected. As prices in cities rise and the gap between the luxury class and lower-income consumers widens, interest in quality and affordability is growing.

(Berlin)

More money is spent on internships, skills, and travel than on the consumption of goods.

Berliners tend to spend more money on internships, skill acquisition, and travel than on the consumption of goods. In particular, since the law guarantees a life-work balance and holidays are taken several times a year in one- to two-month increments, many people travel for long periods of time. Consumption of goods favors affordability. In recent years, gentrification has changed consumption trends, with new restaurants and stores that focus on quality, especially in food. There are also very many opportunities for experience and learning, such as workshops, exhibitions, and symposiums.

8. City Highlights: New York City

Japan Brand Image and Value

#Craftsmanship	<p>Traditional Culture and Craftsmanship</p> <p>Crafts that encompass traditional Japanese techniques and designs with a long history, handed down craftsmanship and philosophy, respect for natural materials, attention to detail, and minimalist, functional design are being received with admiration and respect. They are comfortable to use, versatile, and are gradually gaining recognition in the local life scene as something that gives pleasure to the casual activities of daily life.</p>
#Healthy Clean Food	<p>Delicious, Healthy & Clean Japanese Food</p> <p>From typical Japanese foods such as sushi and ramen, Japanese foods offered in English with Japanese readings such as Matcha, Dashi, Sake, Wagyu beef, and Izakaya are increasing and beginning to permeate the daily food scene. In addition to taste, cooking that makes the most of fresh, clean ingredients such as vegetables and fish, minimal processing, beautiful presentation, and using up ingredients without wasting them are valued not only for their daily healthy eating habits, but also for the time they give us to enjoy them with family and friends.</p>
#Premium Quality	<p>Premium Quality Japanese Products</p> <p>From crafts to food, fashion, beauty products, and stationery, the high quality of Japanese products is widely recognized and appreciated. In addition, the variety and accessibility of these products at relatively affordable prices are very attractive, and Japanese companies such as UNIQLO and Muji have already gained a certain amount of support in New York, especially among those in their 20s and 30s.</p>
#Aesthetic Humble Hospitality	<p>Unobtrusive hospitality and lifestyle overflowing with thoughtfulness and aesthetics toward others.</p> <p>Many people cited the hospitality and cleanliness of Japanese moral and aesthetic values, such as the shopkeepers who saw them off and the careful wrapping, as memorable experiences of their trip to Japan. Zen lifestyle in their daily lives.</p>
#Pop Cool Japan	<p>Pop and Cool Japanese Culture</p> <p>Anime, manga, movies, music, games, and other content and technology are widely recognized by men and women of all ages, providing a great opportunity and catalyst for exposure to Japanese culture. In addition, the cool and pop culture of Japan, which is a cross between traditional and modern, is recognized as embodying a unique and cutting-edge global culture, with its minimalist and pop fashion, Kawaii culture, and contemporary art.</p>

Opportunity Areas for Japanese Brands

Content required by the community

- Tasty, healthy, clean, easy-to-eat, high-quality Washoku (Matcha, Sake, Shochu, Dashi, Onigiri, Bento, Wagyu beef, etc.)
- Japanese products to enjoy time with family, friends and acquaintances (ex. tea and tea utensils) and gifts
- Handmade crafts by artisans (natural materials, things that give a sense of care for things)
- Affordable fashion and lifestyle products of high quality, functionality and design for a variety of occasions
- Japanese cultural and cultural experiences and methods to satisfy your own physical and mental well-being and intellectual curiosity.

Opportunities/touchpoints for people to recognize and like Japan

- From childhood, daily contact with Japanese culture through anime, manga, movies, games, and other content, as well as Japanese food
- Increase the number of local restaurants and Japanese grocery stores that offer differentiated Washoku (Matcha, Sake, Dashi, Onigiri, Bento, Wagyu beef, etc.) to provide accessibility and opportunity for everyday eating.
- Local street food tours, local night tours, artisan tours, Tokyo pop culture tours, and other experiences that allow you to experience the deep, local feel and culture of a place with all five senses and learn about local history and Japanese cultural philosophy.
- An online shopping platform and web magazine that allows customers to purchase high-quality Japanese products in English directly from Japanese producers and craftspeople while in the U.S., as well as video postings and social networking by English speakers who experience both their own country and Japanese culture.

Regional and national cultural and social background

1. multiculturalism, diversity and inclusion

New York is the symbol of multiculturalism, a highly fluid and energetic city where immigrants and businessperson from various countries gather, and new trends are emerging every day. New trends are emerging every day. Intellectuals are curious about new things, open-minded, but easily bored. They are also highly aware of and involved in their local communities and have a strong interest in health and environmental issues.

2. Widening Inequality and Excessive Competition

Large industries such as finance, technology, media, and tourism exist, living standards and education levels are high, and incomes tend to be relatively high. On the other hand, there are social challenges such as busyness, excessive capitalism, competitiveness, economic and educational disparities, and social inequalities such as discrimination and prejudice, and medical challenges such as mental health and unhealthy diets remain.

3. Far and Near "Far East" Japan

The East Coast, in particular, is physically distant from Japan, making it more distant than Europe. On the other hand, accessibility to Japanese food and products is high, with Japanese restaurants, grocery stores, and companies and stores selling Japanese products present throughout the city.

8. City Highlights: Singapore

Japan Brand Image and Value

# Fresh, Lively & Delicious Food	<p>Fresh, lush, delicious. Natural, Local, and Truly Japanese Food</p> <p>In recent years, the quality and cost of raw foods such as sashimi and fruits have dramatically improved and become more accessible. There is an intense longing for historic Japanese cuisine, which is produced from a rich natural and clean water environment with four seasons, oceans from ice floes to corals, and steepness from mountains to rice plains. It is also well known that dishes imported from China and Europe have become Japanese originals that have been elevated to a higher level by the environment, ingredients, and unique innovations.</p>
# Loud & Colorful	<p>Clear, clear, originality. Cool & pop, admiration</p> <p>Japanese people are often ridiculed for being plain, humble, and lacking in individuality, but Singaporeans see them as free, energetic, and creative. The self-realization of the Japanese, not only in terms of famous artists and cute characters, but also in terms of hair, makeup, fashion, general culture, and stationery, combined with a sense of trust in their products, makes them, in a sense, a reference for the same Asian people. In a sense, it has become a reference for the same Asian people. It is a realistic solution, rather than a major fad, and they are trying to incorporate it into their daily lives by using it as a reference.</p>
# Exquisite & Elegant	<p>Elegance, fluidity, and grace. The quality and beauty of use cannot be imitated</p> <p>The fluidity of traditional beauty, nurtured by the long history, abundant nature, and the emotions brought about by the four seasons, has established a unique presence, and the expression of "beauty of use" has been well and widely recognized not only in the technology supported by master craftsmen's skills, such as architecture, its interior appearance, and craftwork, but also in modern industrial products such as audio visual and home appliances. The "beauty of use" has been widely recognized in modern industrial products such as audiovisual equipment and home appliances. We would like to incorporate this beauty into our daily lives so that we can appreciate the products not only for their intended use, but also in our everyday lives.</p>
# Restrained & Understated	<p>Moderation, subtraction, refinement. An expression of intellectual and sophisticated simplicity.</p> <p>True luxury is expressed through minimalism, not through emblems and eccentric design. It is not about emblems or eccentric design. It is a cultural field that has been attracting attention in recent years as the antithesis of the old materialistic society and the chauvinism of the successful members of the rapidly developing Singaporean society and is being bought up in futures and incorporated into everyday life.</p>
# Perfection & Polite	<p>Integrity, precision, politeness, self-sacrifice. Meticulousness, control, and harm.</p> <p>God is in the details. The pursuit of perfection and the rich and tranquil value of experience shaped by precision and politeness. The altruistic quality of service that cannot be measured by the tipping culture. While fascinated by these qualities, the Japanese are also interested in the nonsense of Japan's unique culture of shame (doing things because they are embarrassing or shameful), which they see as anachronistic in its self-sacrifice and excessive customer-first attitude.</p>

Opportunity Areas for Japanese Brands

Content required by the community

- Fusion Japanese food adapted to the local market is good but offer truly authentic Japanese food and experiences.
- For the high-end, chic, savvy, in-depth, and up-to-date ahead of the curve information
- To expand opportunities for eating out, eating in, and eating at home, and especially to make eating at home a daily routine, we will educate people on cooking methods that make the most of ingredients and make them tasty (e.g., local water has no minerals due to seawater filtration and purification. We will change this from the way rice is cooked)
- Promoting understanding of the style, manners, seasonality, healthfulness, benefits, and implications of Japanese food
- Technology that allows you to communicate even if you don't speak Japanese
- Introduce local spots known only to those in the know (not for general tourists, but something more in-depth) (e.g., tea ceremony, flower arrangement, vegetarian cuisine, calligraphy, martial arts, etc.).
- Japan Mania - Introducing the appeal of Japanese content to non-fans
- Provide up-to-date information for those who are not immersed in SNS
- Creation of a centralized Japan-related destination site to keep you up-to-date on the latest developments in your area of interest.

Opportunities/touchpoints for people to recognize and like Japan

- Provide information on deep spots in English as only a local Japanese can, rather than introducing kitschy Japan from a foreign influencer's perspective.
- Sharing the mindset of the Japanese youth generation, trends, and how they incorporate traditional culture - how they enjoy it.
- Understanding of Japanese inner subtleties and communication characteristics (culture of shame, reactive responses, etc.)
- Latest Japanese view update (not all Showa era Moretsu employees)
- Participation in Cosplay, Karaoke, Public Viewing, Festivals, Mochitsuki, etc.
- Offered as a mix, not just a single area (traditional and advanced, kawaii and cool, urban and natural, street food and kaiseki cuisine, etc.)
- Support services for people planning free travel, one-stop service
- Support to make it easier to plan and execute a trip by oneself (It can be easily realized. (One person will inevitably have more opportunities to get to know the locals)
- Japanese Cultural Intelligence - Providing a place where people can experience and learn from the wisdom of Japanese culture
- Increase flights to and from regional airports to attract more advanced visitors to Japan and to stimulate and revitalize demand from non-Japanophiles.
- Increase the number of opportunities to use Japanese products by enhancing cross-border commerce sites originating from Japan in the local market. Enhancement of antenna stores and showrooms where customers can easily try out products known for their high performance and quality.

Regional and national cultural and social background

1. Brains are everything.

The country is small and has few energy resources or production bases. Founded 59 years ago, the only way to face other countries in the international community is to thoroughly utilize "human resources. The society is built around a unique national policy, government-led elite training, and planning strategies and fabless intelligence such as smart cities, IT, and finance. The people have a unique sense of values called "chiasma," in which they always focus on "gain" and "efficiency" and think in terms of "competition" and "ambition," and it is inevitable that they actively seek out advanced Japanese culture.

2. Strangeness of access, hub of the world

All travel is "overseas travel" due to the small size of the country, both rich and poor. About 80% of tourists visiting Japan are repeat visitors. Not only is it geographically important by air and sea, but its official language English, visas, and taxation measures have made it a strategic Asia-Pacific location for multinational corporations and a successful attractor of wealthy immigrants from around the world. The city has a high level of physical and environmental awareness, coupled with the influence of traditional Chinese health consciousness, Oriental medicine, and the respective health philosophies of Islam, India, and the United Kingdom.

3. Multimix vs. High Context

It has formed a multi-ethnic, multi-religious, and multi-cultural society, and as a result, its influence on ASEAN-Oceania is enormous. The gap between Singapore, a multi mixed nation that is always pursuing its ideals, and Japan, a homogeneous nation with its own history as an island nation, which has been closed off from the rest of the world, is huge. Positive impressions of Japanese culture, such as the overwhelming appeal of food and the ACG, coexist with resistance to the stresses of the Japanese workplace and home, condescension, and the closed-off, informal atmosphere that is unique to Japan. and a sense of resistance to the stresses of the Japanese workplace and home, condescension, and the closed, informal atmosphere. Improving the gap will directly lead to increased opportunities.

9. Major research design point recommendations for quantitative research based on this study

Findings from this qualitative study	Verification points for future quantitative surveys	Verification Items/Analysis Methods
<ul style="list-style-type: none"> The overall image of Japan has not only increased in favorability, but there are people who have become deeply fond of Japan as their image has become more multilayered. 	<ul style="list-style-type: none"> It is necessary to define not only the level of favorability by country, but also the number of visits to Japan and the level of enthusiasm, and to develop PR and other measures based on fixed-point observation of these changes. 	<ul style="list-style-type: none"> Japan brand awareness/preference/interest/enthusiasm (loyalty scale).
<ul style="list-style-type: none"> By region, Singapore, while widely accepting of Japanese culture, is less enthusiastic, and some Japanese fans are stronger in Europe and the United States. 	<ul style="list-style-type: none"> Based on the actual usage and consumption amount of Japanese cultural content in each region/city, we will investigate the size and marketability of each Japanese cultural content and fan community in each city. 	<ul style="list-style-type: none"> Japanese cultural content X consumption value by city / Japanese cultural content market size calculation. Consumption Value Cluster Analysis of Japanese Cultural Content
<ul style="list-style-type: none"> While heavy users who visited Japan three or more times liked multiple areas of Japanese culture, there were also some enthusiastic fans who visited Japan zero times. In addition, this survey did not examine the segment of the population that has no interest in Japanese culture. 	<ul style="list-style-type: none"> By investigating the extent to which there is a large segment of the population that is not interested in Japanese culture but is exposed to it, and what kind of Japanese cultural content this segment is interested in and could experience, opportunities for expanding the pie and target demographics will be identified in the future. 	<ul style="list-style-type: none"> Experience/evaluation/interest of travel to Japan. Japanese cultural content, product service usage/evaluation/satisfaction/interest/purchase intention (Japanese culture, product service genre, price range, etc.).
<ul style="list-style-type: none"> In the process of becoming a fan of Japanese brands, travel to Japan and co-experiencing the culture with Japan-loving foreigners were major opportunities. 	<ul style="list-style-type: none"> Identify which experiences have been particularly influential in making those who have recently fallen in love with Japanese culture. 	<ul style="list-style-type: none"> Correlation analysis of Japanese cultural contents and travel experiences to Japan/Japanese cultural contents and information sources for travel to Japan, etc.
<ul style="list-style-type: none"> When compared to Korea and China, Japanese brands were understood with a more resolved image. On the other hand, Korean music, movies, and other forms of entertainment have become an entry point, especially among some Asian youth. 	<ul style="list-style-type: none"> Compared to Korea and China, which are Asian countries with which it is difficult to distinguish differences, differences in image and enthusiasm will be investigated, along with attributes such as age, income, and travel experience, to identify Japanese cultural content and brand image that Japan can uniquely appeal to. 	<ul style="list-style-type: none"> Comparison of Japan Brand Image Scale by Asian Country.