

**First ASEAN Media Content Survey Results:
Average Age of Japan Content Fans in Thailand, Vietnam, and Indonesia is 30.3
Japan Content Fans in Thailand and Indonesia Score High in Japan's Image Value
and Intention to Visit Japan**

The Hakuhodo DY Media Partners Institute of Media Environment, located in Minato-ku, Tokyo, and headed by Masaki Mikami, has finished conducting its First ASEAN Media Content Survey. The survey targeted 500 people in each of three countries (Thailand, Vietnam, and Indonesia), and was designed to study various aspects of the media and content environment—including the status of Japan content fans, how Japan content is perceived, status of media contact, and more.

The survey results indicated that the average age of Japan content fans in the countries studied is 30.3. In terms of the attributes of this “Japan content fan” group, the study also found roughly equal numbers of men and women and a larger percentage of teens than any other age group in Thailand and Vietnam; in Indonesia, the group was scattered among all age groups and skewed towards relatively high income brackets. Surveys in Thailand and Indonesia returned high scores for Japan's image value as well as the percentage of Japan content fans with an intention to visit Japan in the future.

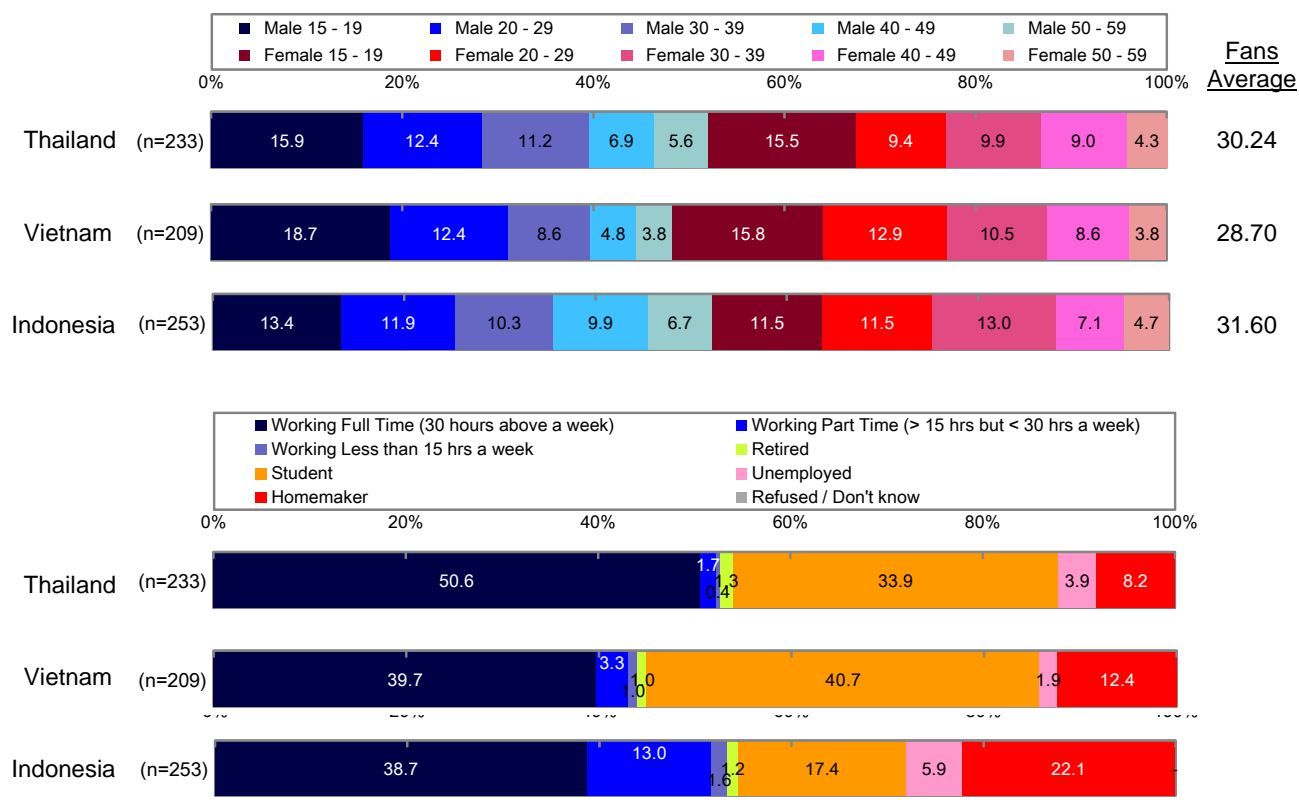
■ **Characteristics of Japan Content Fans**

Note: Respondents who answered that they had a preference for Japanese anime, manga, or movies were labeled “Japan content fans”.

Attributes of Japan content fans

Gender, age, and occupation of Japan content fans by country

- Thailand has a roughly equal number of male and female Japan content fans, and both genders show a relatively high ratio of teens. More than half of those in this group are working full-time, and 34% are students.
- In Vietnam, too, there is a roughly equal number of male and female Japan content fans as well as a relatively high ratio of teens for both genders. The percentages for full-time workers and students are both around 40%.
- Indonesian Japan content fans were also about equal in terms of the number of men and women, and though the percentage of male and female teenagers was slightly higher than other age groups, fans were more equally scattered in this regard. Full-time workers represented the largest group at 39%, followed by stay-at-home wives/mothers (22%) and students (17%).
- The average ages of Japan content fans were 30.2 in Thailand, 28.7 in Vietnam, and 31.6 in Indonesia. This made the average age for the entire group (across all three countries) come out to 30.3.



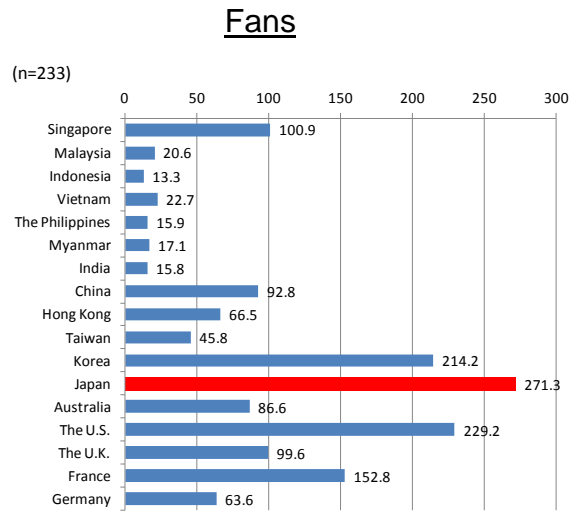
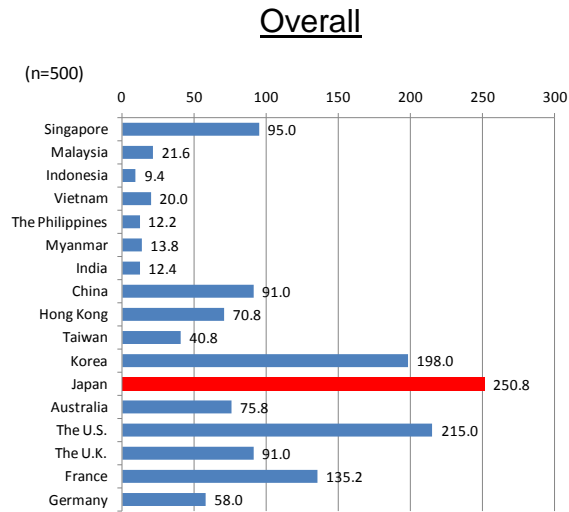
Graph 1: Japan content fans by gender, age, and occupation

Relative image value

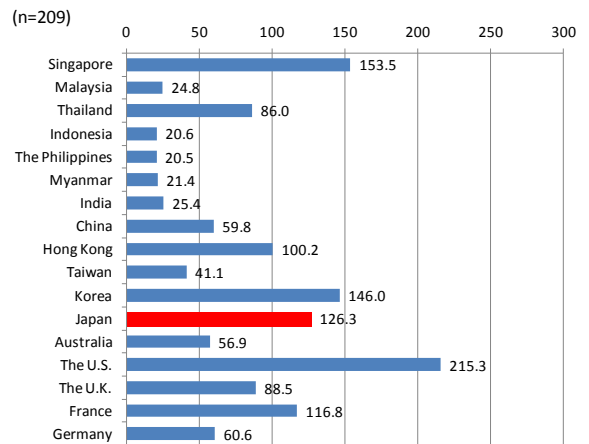
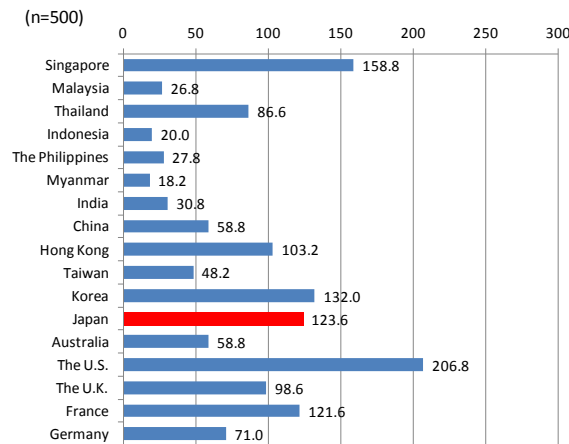
This factor measured the degree of interest in the fashion, food, tourism, education, medical services, or trends/lifestyles in a particular country or region (values for 18 countries/regions, including Japan, were measured). Our survey compared overall image value scores with those of Japan content fans.

- Thailand showed the highest image value score for Japan, followed by the US and Korea. Thai respondents reported low image values for all other ASEAN countries besides Singapore.
- Vietnam showed the highest image value score for the US. Japan and France came in fourth place with roughly the same score.
- Indonesian respondents put Japan in third place after Singapore and the US. Image values were low across the board.

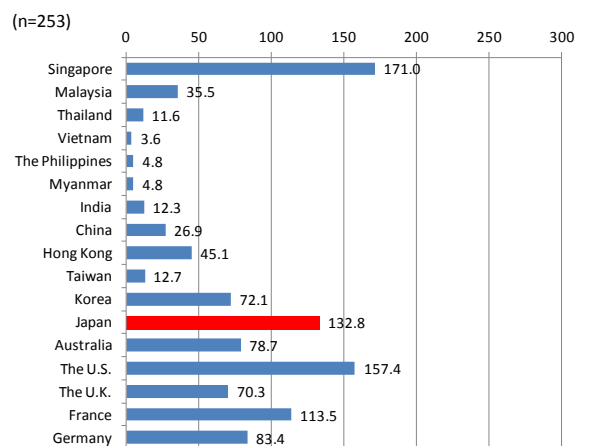
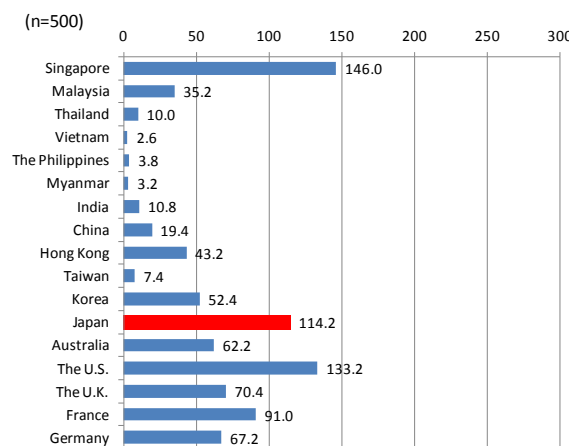
Members of the Japan content fan group reported a higher image value for Japan than for survey respondents overall. Our study revealed that the acquisition of fans through the content industry has an impact on other non-content industries as well; specifically, fashion, food, tourism, education, medical services, and trends/lifestyles. Being a Japan content fan correlated particularly strongly with image value in Thailand and Indonesia, where their scores were around 20 points higher than survey respondents as a whole.



Thailand



Vietnam



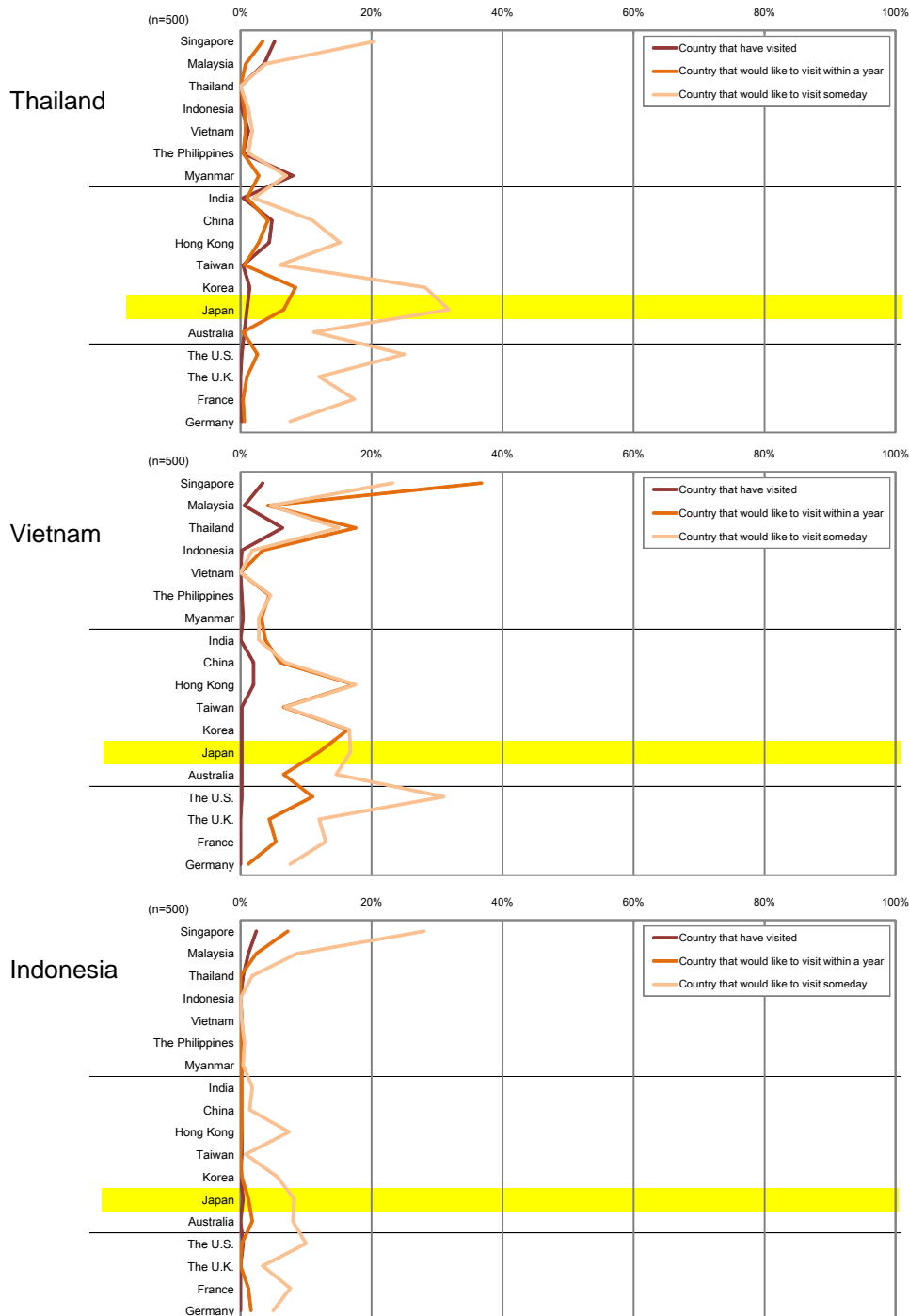
Indonesia

Graph 2: Image value scores by country/region (Japan content fans vs. all respondents)

Travel experience/intention for 18 countries and regions

This factor measured visits to each country in the past, the intention to visit within a year, and the intention to visit sometime in the future.

- Japan was the number-one destination Thai respondents wanted to visit someday, and number two among countries that they wanted to visit within a year.
- The US was number-one among countries that Vietnamese respondents wanted to visit someday, with countries like Singapore and Thailand showing high “visit within the year” scores.
- Among Indonesian respondents, Singapore was the number one country in all three categories (visits in the past, intention to visit within a year, and intention to visit someday). Scores were low overall in Indonesia.



Graph 3: Travel experience/intention to visit for 18 countries and regions

(Comparison of Japan travel experience/intention to visit scores)

This factor assigned scores to “have visited”, “would like to visit within a year”, and “would like to visit someday” responses for Japan to compare Japan content fans with respondents overall.

- The highest percentage of respondents indicating a desire to visit Japan was in Thailand, with the number of those saying they wanted to visit “within a year” or “someday” totaling just under 40%. The percentage was just under 50% among Japan content fans.
- In Vietnam, the percentage of respondents that said they wanted to visit “within a year” was a little over 10% both overall and for the Japan content fan group. Adding in those who indicated that they wanted to visit Japan “someday” increases the ratio to around 30%.
- Indonesian respondents showed little intention to visit Japan, with the percentage of Japan content fans who said they wanted to visit “someday” still just over 10%.

	Thailand		Vietnam		Indonesia	
	Overall (n=500)	Fans (n=233)	Overall (n=500)	Fans (n=209)	Overall (n=500)	Fans (n=253)
Have visited	1.0	2.1	0.2	–	0.4	0.8
Would like to visit within a year	6.6	9.0	12.0	13.9	1.2	2.4
Would like to visit someday	31.8	37.3	16.8	19.6	8.2	13.0

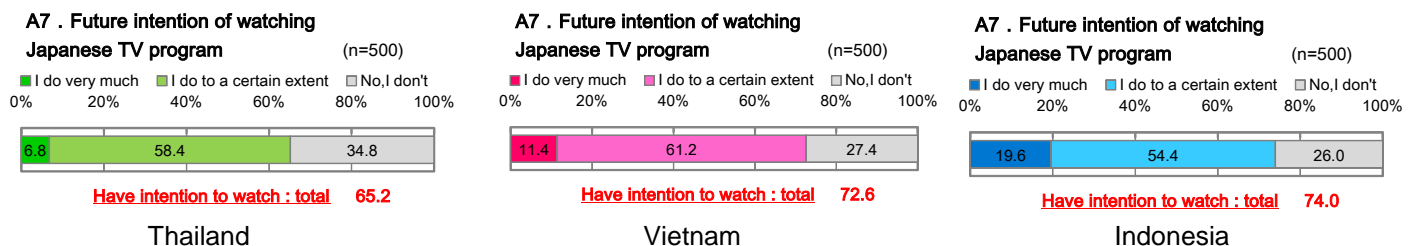
Table 1: Japan travel experience/intention to visit (Japan content fans vs. all respondents)

■ Potential of Japan content

Interest in Japanese TV programs

This factor measured respondents’ desire to watch Japanese TV programs.

- The percentage of respondents who reported that they had the intention of watching Japanese TV programs was 65.2% in Thailand, 72.6% in Vietnam, and 74.0% in Indonesia.

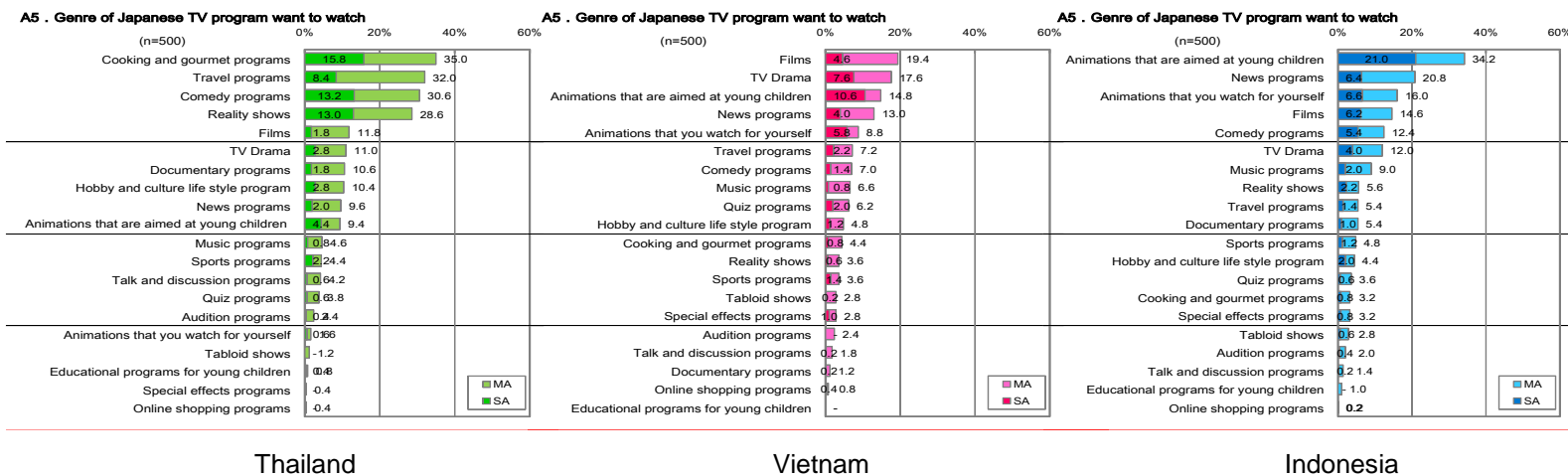


Graph 4: Interest in Japanese anime and manga

Preferred Japanese TV program genres

This factor measured the types of Japanese TV programs that respondents most wanted to watch.

- The top three most-preferred types of Japanese TV programs in Thailand were cooking and gourmet programs, travel programs, and comedy programs.
- The top three in Vietnam were movies, TV dramas, and animations that are aimed at young children.
- In Indonesia, animations that are aimed at young children were strongly preferred over other genres, with over a third of respondents indicating that they had a desire to watch them.



Graph 5: Most-preferred Japanese TV program genres

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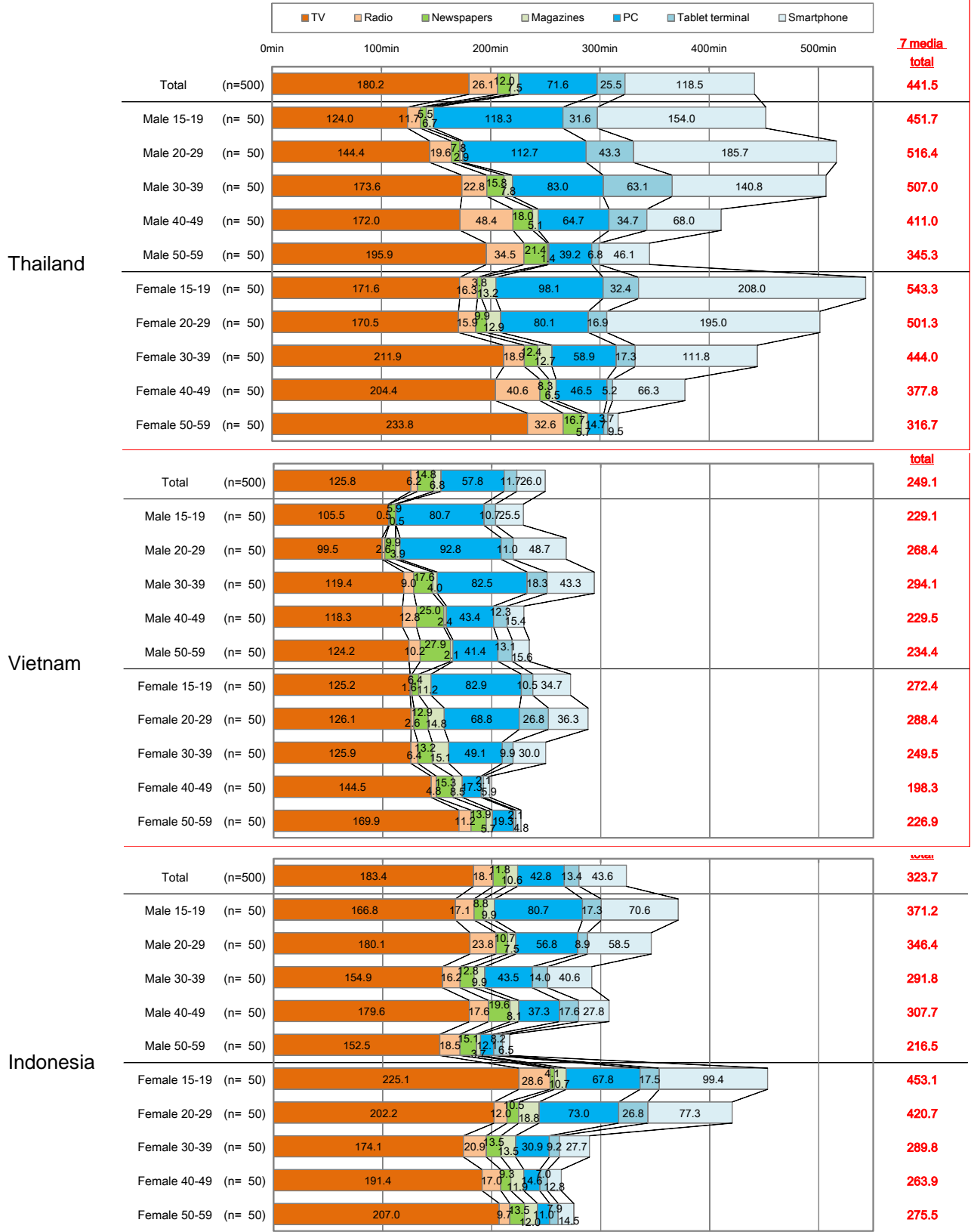
■ The media environment in Thailand, Vietnam, and Indonesia (excerpt)

Time spent interacting with media (breakdown)

This factor measured the relative time respondents spent in contact with various forms of information media (TV, radio, newspapers, magazines, computers, tablets, and smartphones) both in and out of the house.

- Among Thai respondents, the group that reported the most amount of contact time overall were teenage girls, who spent a total of 9 hours per day interacting with media—more than 90 minutes longer than boys in the same age category. The younger the person, the more time they tended to spend interacting with computers and smartphones, with this figure exceeding TV contact time for respondents in their teens and 20s.
- Overall media contact times were longest among men in their 30s in Vietnam, totaling just under 5 hours per day. Women in their 20s were next in terms of overall length of contact. Women in their 50s and 60s spent more time watching TV than other groups, but very little time interacting with digital media (computers, tablets, and smartphones).
- Teenage girls spent the most time (a total of 7.5 hours per day) interacting with media in Indonesia—more than 80 minutes longer than their male counterparts. Women in their 20s were next in terms of contact time, indicating pronounced media contact times among young female Indonesians overall. The amount of interaction with computers and smartphones tended to increase with a decrease in age.

Q5X . Time spent on media usage : 7 media total (Weekly average)



Graph 6: Media contact times

Survey design

- Survey period: February 2014
- Survey area: Bangkok, Thailand; Ho Chi Minh, Vietnam; Jakarta, Indonesia
- Survey method: Interviews
- Sample size: 500 in each country
- Sampling criteria: Men and women age 15–59 with an equal number of samples in each five-year age category; samples ideally had a household income among the top 70% for each city.
- Survey items:
 - Status of the media environment (media contact times, type of infrastructure, device usage, usage rate for key internet services, flat-fee services)
 - Media content behavior (information on local and Japanese broadcasts, movies, sports, music *anime*, *manga*, and books/magazines)
 - Country image values, travel experience/intention to visit certain countries, recognition rate for Japan-related events, Japan image values and sources of information on Japan
 - Information behavior, entertainment-related information sources, items measuring advertising and media awareness level
 - Payment methods, credit card ownership, experience paying for internet/mobile purchases and/or digital content

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