

Transitions in Japan's National Branding: Recent Developments and Potential Future Directions to Facilitate Small Business Entries Overseas

日本の国家ブランド化の推移

—近年の進展と、中小企業の海外進出促進に向けた将来とるべき方向性—

Education Center, Yokohama National University

Tara Cannon

キーワード: 国家ブランド化、文化輸出、文化外交

Keywords: national branding, cultural exports, cultural diplomacy

要旨

日本は長年の間、多様でありながら正統性に満ちた史蹟や日本料理その他により、広い範囲で高いブランド力を享受してきた。しかしこのブランド力はいわば、自発的に向上してきたのである。日本政府によって国家ブランドを高めようという努力が意図的に行われたのは、この十年ほどのことに過ぎない。本稿では日本の首相や外相が行った演説やその他の政府文書の例を挙げ、近年の日本の国家ブランド戦略の拡大を議論する。その上で「日本ブランド」の適用に関する未解決の諸相に焦点を当て、政府もしくは日本貿易振興機構（JETRO）などの政府関連機関による情報の収集と提供に関して、各企業、特に中小企業が、その製品を海外市場の動向や感覚の差異により巧みに合わせられるよう提案を行う。

Abstract

Japan has long enjoyed a broad-based national brand as the result of its diverse and authentic historical sites, culinary offerings, and so on. However, its brand has emerged largely organically. Conscious efforts by the Government of Japan to develop the national brand are relatively new, going back roughly only a decade. This paper explores the expansion of Japan's concept of national branding over this time, citing examples from speeches made by Japanese prime ministers and foreign ministers and other government documents. It highlights certain unresolved aspects regarding the coverage of the "Japan Brand" and offers a recommendation for information gathering and provision by the government or government-affiliated organizations such as JETRO that would enable businesses, particularly small businesses, to tailor their products more adeptly to the trends and sensibilities found in overseas markets.

1. Introduction

The notion of "place branding" has come to receive a great deal of attention in recent years. A June 2012 web search on Google yielded roughly 150,000 citations of the term, in contrast to what is claimed to have been a mere 17 citations in February 2004 (Association for Place Branding and Public Diplomacy, n.d.).

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Much as France enjoys an expansive country brand that ranges from high culture visual arts, historical buildings, and fine cuisine to street-side cafés and urban nightlife, Japan's national brand also covers a broad range.

Recent tourism and public relations campaigns notwithstanding, Japan's image internationally has for the most part not emerged as a result of overt branding efforts. Instead, its appeal has been principally organic in nature, reflecting widespread recognition of the authenticity and diversity of its tourist attractions and the uniqueness of its culinary offerings. Its educational system as well as its social cohesion and stability, which includes a broad range of elements ranging from a low crime rate to good labor relations, have also contributed to its brand strength.

One notable point has been the material changes to certain aspects of Japan's brand image in the post-war years. In the area of manufacturing, for example, by the 1970's Japan had essentially erased from the public's mind much of the poor reputation it held in the 1950's and early 1960's for deficient product quality, eventually reaching the point where, by the 1980's, Western companies were emulating Japanese "lean manufacturing" practices and quality control systems. Similarly, Japan overcame its reputation for horrific industrial pollution to become one of the preeminent leaders in pollution mitigation and other environmental areas, including energy efficiency.

Another pronounced change from around the same era can be seen in the sudden rise of the "Corporate Japan" image ubiquitous in the 1980's, and its equally sudden demise in the 1990's after the bursting of the Japanese "bubble economy." While the perception of Japan as a nation of "corporate warriors" has unmistakably faded, certain aspects of the era's corporate culture remain well-ingrained in the public's consciousness internationally, including the image of a dedicated and tireless Japanese workforce (*The Independent*, 2010).¹

In the last decade there have been increasingly broad-based efforts by the Japanese government to promote "the Japan brand," initially largely in response to the rise in interest overseas in the country's modern cultural offerings, but consistently as efforts to identify areas of expanding business potential. This paper seeks to identify key points of transition in the government's promotion of the country brand, placing particular focus on speeches made by Japan's prime ministers to the National Diet, speeches made by the Minister for Foreign Affairs, and other key government documents. It then discusses the trends that have emerged and finally offers a recommendation for future developments to enable small businesses to enter overseas markets.

¹ This November 2010 article begins with the assertion, "Workaholic' may no longer be the most appropriate label for Japanese businessmen." This demonstrates how long the image of "workaholic Japanese" has lingered, long after the "corporate warrior" image has faded from public consciousness.

2. The Evolution of National Branding in Japan

The first use of the word “brand” in a policy speech by a Japanese prime minister appears in Prime Minister Junichiro Koizumi’s address to the National Diet in January 2005, in which he notes the global appeal of Japanese animation and explicitly states a policy of “promoting businesses that capitalize on contents such as films and animation and strengthening Japan's appealing brand message in areas such as fashion and food.”

This was not an attempt to translate domestic-market successes to an international market; on the contrary, it was a response to the high degree of interest in Japan that was already evident around the world at that time. Japanese animation was certainly not new to international audiences. Early examples included the broadcast of the *Astro Boy*² series in the United States beginning in 1963 (Tezuka Productions, n.d., para. 3) and Tatsunoko Production’s *Speed Racer*³ series in the United States in the late 1960’s (“Speed Racer,” n.d.). More recently, the Toei Animation’s *The Transformers*⁴ had been familiar to audiences in the US and UK since the mid-1980’s.

More strikingly at the time of the 2005 Koizumi speech, the *Pokémon*⁵ franchise had demonstrated an enduringly robust popularity ever since the latter half of the 1990’s, while animated films for more mature audiences had also made new headway, with Hayao Miyazaki’s *Spirited Away* surpassing \$10 million in gross box office receipts in the U.S. alone by September 2003 (“Box Office/Business,” n.d.). A noticeable uptick in worldwide interest in Japanese street fashion also appeared at this time, with online sites such as *tokyofashion.com* (launched in 1998) and *japanesestreets.com* (launched in 2002) appearing in this era.

The perception of Japanese food as “healthy” and “contributing to longevity” had also given rise to a boom in Japanese cuisine in the early 2000’s (Shokubunka Kenkyuu Suishin Kondankai, 2005, p. 5). There was, however, some concern on the part of the Japanese government that the nature of many Japanese dishes limited people’s ability to partake of authentic Japanese cuisine, due to a lack of essential knowledge regarding the handling of raw fish and other food hygiene-related matters (*ibid*, p.18). While this was acknowledged as holding back the growth of the industry, it was also viewed by the Japanese government as giving Japan greater business opportunities in the area of training and education (*ibid*, pp. 10-11), in addition to the potential for inbound tourism to enable enthusiasts to enjoy truly authentic cuisine.

While Koizumi’s 2005 address to the Diet is noteworthy for having contained the first reference within a policy speech to fostering Japan as a “brand,” by that time explicit government efforts

² *Tetsuwan Atom* in Japanese.

³ *Mahha GoGoGo* in Japanese.

⁴ *Tatakae! Choo Robotto Seimeitai Toransufoumaa* in Japanese.

⁵ *Pocketto Monsutaa (Pokemon)* in Japanese.

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related to country branding were already underway. Most notably, during his address to the National Diet in February 2002, Koizumi had announced a new national policy focused on “intellectual properties that are strategically protected and utilized so that we can enhance the international competitiveness of Japanese industries.” This was followed by the creation of the Strategic Council on Intellectual Property the following month and the enactment of the Intellectual Property Basic Act in December that same year.⁶ The initiatives launched during 2002 may be considered to be among the earliest concrete and explicit efforts at building a Japanese “brand.”

Thus, while attempts to improve country branding were already underway to some extent, they reached a new level of recognition through the January 2005 policy speech to the Diet. By this time a “Japan Brand Working Group” had already been established (November 2004) and its first report was compiled by February 2005. The report calls the 21st century “the era of cultural power,” claiming that the key to becoming a nation “loved and respected by the world” is found in “cultivating the ability to obtain desired results (‘soft power’) through Japan’s attractiveness, namely cultural power,” rather than in military or economic power (Intellectual Property Strategy Headquarters, 2005, Section 1.1).

In 2005 Japan’s Ministry of Foreign Affairs (MOFA) also conducted a program bringing “newspaper or magazine reporters specializing in cultural matters” from around Asia to Japan for 11 days in order to introduce the participants to “Japanese pop culture, and in particular, the charm of Japanese anime that enjoys high popularity in Asian countries, as a new form of Japanese culture, and to make this aspect of Cool Japan widely known in their respective countries” (MOFA, 2005a). The Ministry’s Deputy Press Secretary stated that this program was reactive rather than proactive, saying that with anime and other aspects of Japanese pop culture already very much in vogue among Asian youth, this was an “attempt... to catch up with this ongoing trend” (MOFA, 2005b), rather than to create a trend.

In April 2006, Foreign Minister Taro Aso, known for his love of comic books, made a speech focused on cultural diplomacy. He cited the example of the American cartoon character Popeye as a key cultural element that helped shift post-war Japanese children’s perspective on U.S. sailors to “an image that American sailors are on the side of justice,” even though not long before, during World War II, “Americans had been something akin to devils.” In the same way, he underscored

⁶ This stands in contrast to the “e-Japan” program announced in January 2001 by the IT Strategy Headquarters, established within the Cabinet in July 2000 and headed by the prime minister (Yoshiro Mori at the time of establishment). This program had sought to enable “the private sector [to] engage in various original and creative activities” and called for the fostering of “digital content creators... to explore the frontiers of IT” (IT Strategy Headquarters, 2001). Thus, while the e-Japan program touched upon electronic and other forms of commerce and digital content creators, it did not place these elements within an international context per se.

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the role of Astro Boy and Doraemon within Asia in shifting people's perspective on robots away from "negative connotation[s]" towards a perception of robots as "benevolent friend[s] who [help] human beings."

In this way he argues that newer aspects of culture have a proven ability to shape people's perspectives. He thus concludes that pop culture should be taken "seriously," going so far as to say that "any kind of cultural diplomacy that fails to take advantage of pop culture is not really worthy of being called 'cultural diplomacy,'" and urges the audience (persons in contents-related fields and other "cultural practitioners") to "join with [the Japanese government] in polishing the Japan 'brand.'" Moreover, he calls for an "all-Japan" approach, claiming that government-related entities are but a catalyst and that "we should be creating networks and establishing good public-private partnerships, polishing the brand of Japan together."

Other efforts in the area of pop culture promotion in subsequent years include the "Anime Ambassador" project launched in 2008 (MOFA, 2008) and the 2009 appointment of three "New Trend Communicators of Japanese Pop Culture in the Field of Fashion," also known as "KAWAII Ambassadors," who are young women appointed "to transmit the new trends of Japanese pop culture in the field of fashion to the rest of the world," with one ambassador assigned to promote "Lolita" fashion, another to "Harajuku" style fashion, and a third to "school uniform" style fashion (MOFA, 2009). The Ministry's top page on its web site in the area of Pop Culture Diplomacy sums up such efforts by saying, "The Ministry of Foreign Affairs, aiming to further the understanding and trust of Japan, is using pop culture, in addition to traditional culture and art, as its primary tools for cultural diplomacy" (MOFA, n.d.).

While Prime Minister Shinzo Abe, in his first policy speech to the National Diet in September 2006, stated it was necessary "for Japan to present its new 'country identity' for the future to the world" along with his intention to establish a strategy for overseas public relations, his choice of words clearly indicate an intentional departure from the notion of "branding" as his predecessor Koizumi (and Koizumi's Foreign Minister, Aso) had conceived of it. First, his non-standard word choice for the concept (the katakana "*kantorii aidentitii*" in Japanese), while defined within the speech, was generally criticized as virtually meaningless for the average person,⁷ and thus it is difficult to see his stance as being a call to action from related private sector entities or the general public, in contrast to earlier calls for an "all-Japan" approach. Moreover, the term is in fact defined within the speech as "[Japan]'s ideals, the direction in which we should aspire, and the way in which we convey our Japanese-ness to the world," a notion that is clearly a departure from national

⁷ Indeed, a web search for the term in July 2012 yielded results suggesting that virtually the only usage of the term "*kantorii aidentitii*" in katakana has been either by Prime Minister Abe himself or in commentary about him, suggesting that this term was in general usage neither at the time of the speech nor afterwards.

branding.

More importantly, as the phrase “country identity” and the statement of intent to implement a new overseas public relations strategy both appear in the concluding remarks of the speech rather than within the main text, these can be seen as having been relegated to minor status within the new administration's priorities.

The Asian Gateway Initiative, one of the most important policy proposals put forth by the Abe administration, highlighted the need for “regional branding with international competitiveness,” and indeed, Abe's second policy speech to the National Diet in January 2007 explicitly referred to the importance of “branding local products.” Such efforts were to be conducted in line with the recommendations of the Comprehensive Strategy for Creative Industries, namely that “a yearning to be better acquainted with Japan's diverse culture attracts people from across the world, producing substantial effects on a broad range of industries over the medium to long term” (Council for the Asian Gateway Initiative, 2007, p. 25) and that in light of this, measures should incorporate “a long-term perspective” (p.26) and “promote Japan's attractiveness overseas” (p. 27), among other efforts. The gist of Abe's statements on branding were very much focused on the potential for revitalizing local regions rather than expanding overseas the Japan brand as a whole.

The next mention of branding in a prime minister's policy speech came in January 2009, in Prime Minister Taro Aso's address to the National Diet. He stated that “Japan ... is itself a brand which people the world over admire” and that this represented a “latent power and vitality” that would harness regional/local appeal as well as content, fashion, and food-related areas.

Branding received more emphasis under the Naoto Kan administration, which set forth in a Cabinet decision “overseas public relations activities ... and strengthening of the brand strategy” as one of the pillars of the Ministry of Foreign Affairs' economic measures (MOFA, 2010). Five pillars of economic diplomacy were later set forth in 2010, of which three were relevant to national branding: “promoting export of Japanese infrastructure,”⁸ “developing Japan as a tourism-oriented country,” and “publicizing the Japan brand” (MOFA, 2011, p. 8).

The Working Group on Global Communication in the Government and Related Organizations of Japan also announced a Basic Strategy in December 2010 that set forth “priority areas that exemplify Japan's strengths and attractiveness” in order to “enhance Japan's international presence and communicate the ‘Japan brand’ to the world.” Although this Strategy focused on communication strategies, this shifted the context in which branding was discussed, first by placing “special emphasis on the Asian region,” and second by stating that the “‘Japan brand’ will be

⁸ Prominent examples of infrastructure to be exported include high-speed rail systems and nuclear power stations. In the case of high-speed rail systems, for example, the “infrastructure” to be exported would include both the infrastructure and the superstructure, including the rail lines and train cars as well as the signaling systems and various other advanced technologies, all as part of a single ‘package’ to be sold.

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established and communicated based on the nation's ability to solve global issues and push the frontier of human potential." Examples of national strengths included Japan having the longest healthy life expectancy in the world, the lowest carbon dioxide emissions per unit of GDP among advanced countries. The Basic Strategy also mentions growing global interest in "food, fashion, music and animation films" and using these to increase demand in "tourism and healthcare provision." It also indicated explicit recognition that Japan's "underlying philosophy" directly impacted the power of the brand and emphasized the value of promoting "Japanese concepts advocated in the world," such as human security.⁹

In this way, the breadth of what was recognized as the "Japan brand" was dramatically expanded. While the focus until that time had been the promotion of specific products or industries, this was expanded to include approaches to global issues such as rapidly aging societies and environmental concerns.

After the Great East Japan Earthquake and the subsequent nuclear accident in Fukushima Prefecture, efforts focused on restoring the status of the Japan brand, particularly in the area of food, and on furthering Japan's reputation for dealing successfully with difficult-to-manage issues that are commonly faced in other countries as well, such as the aging society and severe energy restraints.

Foreign Minister Takeaki Matsumoto highlighted the key elements of the post-earthquake branding strategy in a speech delivered in May 2011, citing "safe and secure Japan," "excellent Japanese science and technology," and "human development, technology and culture" as "appealing aspects of the Japan Brand" that have maintained their strength.

Under the Noda administration, branding has been emphasized as a means to revitalize local regions and restore the vitality of Japan as a whole (Cabinet Public Relations Office, 2012). The Cool Japan Strategy released in January 2012 by the Creative Industries Division of the Ministry of Economy, Trade and Industry (METI) highlights the themes that first emerged in the mid- to late 2000's—fashion, anime, and food culture—together with "regional specialties and design skill"¹⁰ as the "outbound" components of the Strategy.¹¹ That, in turn, is expected to give rise to the "inbound" component of tourism, namely, visits by tourists and creators "coming to Japan in search of the 'real thing' and the 'real place'" (METI, 2012a, p. 10).

⁹ "Human security" is a concept originally put forward by Japan that was introduced as a "distinctive new concept" in the 1994 Human Development Report of the United Nations Development Programme (UNTFHS, n.d.).

¹⁰ The Strategy cites as an example of this Kumano (Hiroshima) makeup brushes, which are noted as being "highly regarded" in Hollywood and elsewhere (p. 4).

¹¹ In contrast, under the theme "Cool Japan," the Japan External Trade Organization (JETRO), a government-related organization tasked with promoting exports and encouraging inward investment, focuses on food, fashion, entertainment ("from anime and manga to video games and film") and design (n.d.).

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The Strategy also mentions an expanded number of products and services that can be incorporated into Cool Japan, including delivery services (*ibid*, p. 4) and housing-related areas, such as interior-related businesses, energy-saving appliances, and so on (p. 12). Similarly, the Public-Private Expert Panel on Creative Industries, which was convened under the auspices of METI, began meeting in November 2011 and released a proposal in May 2012 that focused on “overseas expansion strategies mainly for six sectors,” namely “(1) apparel and fashion, (2) monozukuri and regional products, (3) food, (4) content, (5) tourism and (6) home” (METI, 2012c).

The Liaison Meeting on Global Communication in the Government of Japan in June 2012 set forth a Basic Strategy for Global Communication Activities that replaced the Basic Strategy of December 2010. One notable change was that statement that, “Japan will, *as a matter of national strategy* (emphasis added), be proactively engaged in further developing and strengthening the Japan brand worldwide while communicating the full diversity of Japan's strengths and attractions as well as Japanese virtue.” This signals that branding efforts are now to be designed in a more comprehensive way that involves multiple ministries. It also opens the door to greater support through public sector-private sector cooperation and is expected to facilitate government budget allocations and the appropriation of human resources.

3. Discussion

Through this examination of the evolution of national branding in Japan, a certain trend has emerged, which in turn gives rise to issues regarding the future path to be taken.

First, there is a clear trend towards diversification of the types of products to be covered within branding strategies. Branding as a strategy initially focused on making optimum use of items that were already known to be successfully marketable abroad. This has transitioned to the inclusion of other areas, such as interior-related businesses, energy-saving appliances, and healthcare, which are as yet in only a fledgling state at best in overseas markets. For some product categories such as appliances, markets are already well-established, and the goal from here on will be to emphasize a different aspect (superior energy-saving features) as opposed to overall product quality, which has long been Japanese products' major area of distinction. In other market areas, such as interior-related businesses, much of the challenge in the near term will lie in carving out a niche of sufficient size to justify the costs and risks of overseas expansion.

Another major change is that the branding strategy now also includes broad-based, cross-sectoral approaches to pressing issues. Japan has historically made unequivocal, and in some areas unrivaled, progress in addressing and overcoming severe environmental issues, including deplorable cases of industrial pollution, as well as extremely challenging natural resource limitations, including the oil shocks of the 1970's. Japan has also successfully introduced such concepts as “human security” to the global community. Proactively addressing the challenges of its

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aging society, its new energy constraints, and other such issues is expected to fortify the undercurrent of respect for Japanese solutions overall, thus enhancing the receptivity of other countries to future Japanese business dealings (even outside of the business sectors directly relevant to the challenges being addressed) and Japanese diplomatic endeavors. The inclusion of such matters into the concept of branding can be expected to make it easier for the government to concentrate policy options and fiscal and other resources on communicating and enhancing its brand overseas.

One area that appears to require a greater allocation of resources is in the area of public-private partnerships. The *Diplomatic Bluebook 2006* states, "In recent years, widening the appeal of the Japan Brand through public-private partnerships has been a mounting necessity" (p. 242). Thus, there has been the recognition of a need for public-private cooperation for some time. Efforts typically undertaken by the Ministry of Foreign Affairs in this area include pushing for regulatory reforms or other improvements to the overseas business environment, concluding investment and taxation agreements, and so forth. In addition to these endeavors, the Ministry has been working to identify and address the issues that Japanese companies confront overseas by eliciting a wide range of views on current obstacles (p.242).

METI has meanwhile been making efforts to increase the ability of small and medium sized companies to expand overseas. In contrast to what many might imagine as the reaction of small pop culture businesses to interacting closely with the government, *The Economist* (2011) quotes a fashion designer who claims that "Japan's hottest trendsetters are too niche to expand abroad on their own" and that using METI is necessary to avoid being copied by foreign rivals.

One concrete result of this public-private cooperative approach has been the opening in Singapore of the shop "Harajuku Street Style" in October 2011 on Orchard Road, the nation's shopping hub. The goal is to test market Japanese "street fashion" brands and generate market data regarding local acceptance (METI, 2012b).

The FY2012 budget proposed by the Noda administration included an allocation for assisting Japanese companies expanding overseas. In light of the harsh fiscal environment after the Great East Japan Earthquake, particularly the need to focus on small businesses in the Tohoku area, this allocation indicates that the administration considers the development of overseas businesses to merit considerable priority.

One area that needs to be worked out in the coming years is the degree to which "authenticity" will be emphasized within assistance provided by the government. Virtually all of the examples of successful Japanese products noted thus far have been "authentic" items marketed overseas. The question arises as to whether less "pure" versions of goods and services will find an equally warm welcome under the umbrella of the "Japan brand."

One might argue that part of the appeal of Japanese goods marketed abroad is their

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authenticity—that is, much of their appeal stems from the fact that they have *not* been adapted to suit local tastes. In line with this thinking, the Cool Japan Strategy of January 2012 highlights that, for example, of the roughly 9,000 restaurants in the U.S. advertised as serving Japanese food, less than 10% are owned by Japanese. The suggestion is that there is great potential for authentic Japanese cuisine to expand its presence in the market (p. 5).

However, considering these same statistics from a different angle, they also suggest that there is in fact a considerable market for “not quite authentic” products, and that this may be much greater, and thus a better target for future overseas expansion, than the market for truly authentic items. For example, in the area of fashion, most of the attention has been focused on building a customer base in what is recognized, even in its home market of Japan, as a limited niche market. Variations or modifications to these fashions—that is, fashions with a Japan-inspired ‘flavor’ or ‘undertone’ or ‘influence’ but not clearly in the “Harajuku” or “Lolita” or other such category—are likely to broaden the potential customer base, but at what could be argued as a loss of authenticity. The issue is the degree to which such deviations will be accepted, and ultimately encouraged, under the “Japan brand” umbrella.

Embracing the appeal and commercial potential of “authentic” fashions, cuisines, and so on does not mean that less “pure” versions are of reduced value. Less authentic versions do not necessarily diminish the brand or have poor commercial viability. There is room within the branding strategy to identify and embrace both national and local sensibilities in the receiving markets.

Lessons in this can be taken from the experiences of anime exporters. Some anime, such as the *Sailor Moon* series, had edits made before their broadcast in the U.S. to eliminate cleavage or hide body contours, such as making bath water opaque instead of clear. In contrast, the German version of the series was for the most part broadcast identically to the original Japanese version (*Sailor Moon*, n.d.). This demonstrates a case of adapting one particular product in different ways to match the sensibilities of two different receiving markets.

Assuming that such variation is to be welcomed under the branding umbrella, there is then the practical issue of how small companies would, as a practical matter, be able to modify their goods in keeping with local sensibilities. It is, naturally, only possible when the manufacturer has access to information regarding local norms. Aspects such as color preferences and sizing needs are also highly locally specific, and smaller companies are again typically highly disadvantaged in gaining access to usable information of this type.

Since smaller companies have greater difficulties in not only identifying local sensibilities but also determining which among these are material enough to merit modifications to the products or services offered, the government or government-affiliated organizations such as JETRO could play a key role in compiling and facilitating access by smaller companies to such information. Trends can only be seen over the context of time, and thus early action in information gathering and

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distribution is likely to yield substantial results over the medium term and beyond.

In conclusion, while Japan's national branding strategies can still be seen as being in a very early stage of development, expansion into overseas markets is taking place within a context of high interest in Japanese goods that has been already well in place for more than a decade. As the brand strategy moves forward, increased focus on overseas expansion of markets within both policy and budgetary allocations will clearly be necessary. However, another key to success is likely to be found in identifying ways to provide smaller businesses with the information necessary to enable them to first, make the decision whether or not to enter overseas markets, and second, modify their products in keeping with local trends and local sensibilities.

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