

# Opinion Poll on Japan in Six ASEAN Countries



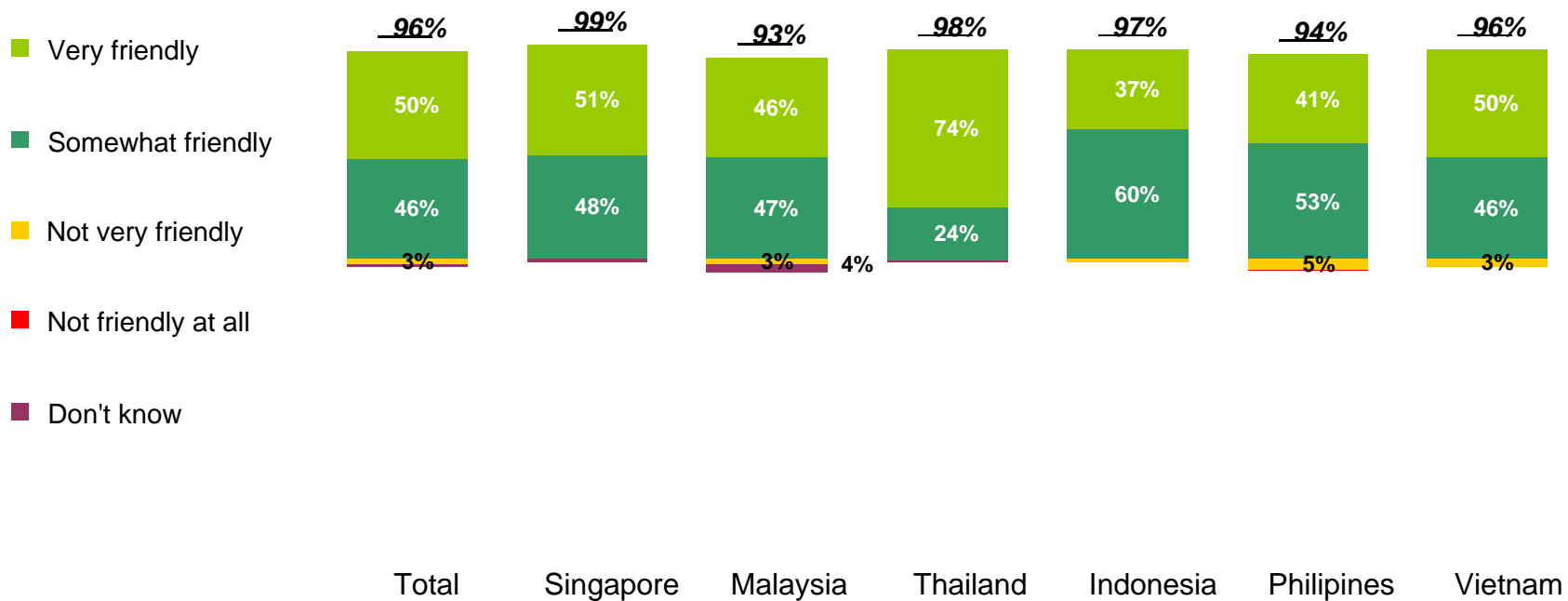
The Ministry of Foreign Affairs of Japan commissioned TNS Singapore to conduct an opinion poll on Japan in the six ASEAN countries (Indonesia, Malaysia, Philippines, Singapore, Thailand and Vietnam) during February and March 2008.

This poll was conducted by either through interview or online to 300 nationals or permanent residents over 18 years old in each country.

- \* Face to Face – Indonesia, Philippines and Vietnam
- \* Online – Malaysia, Singapore and Thailand

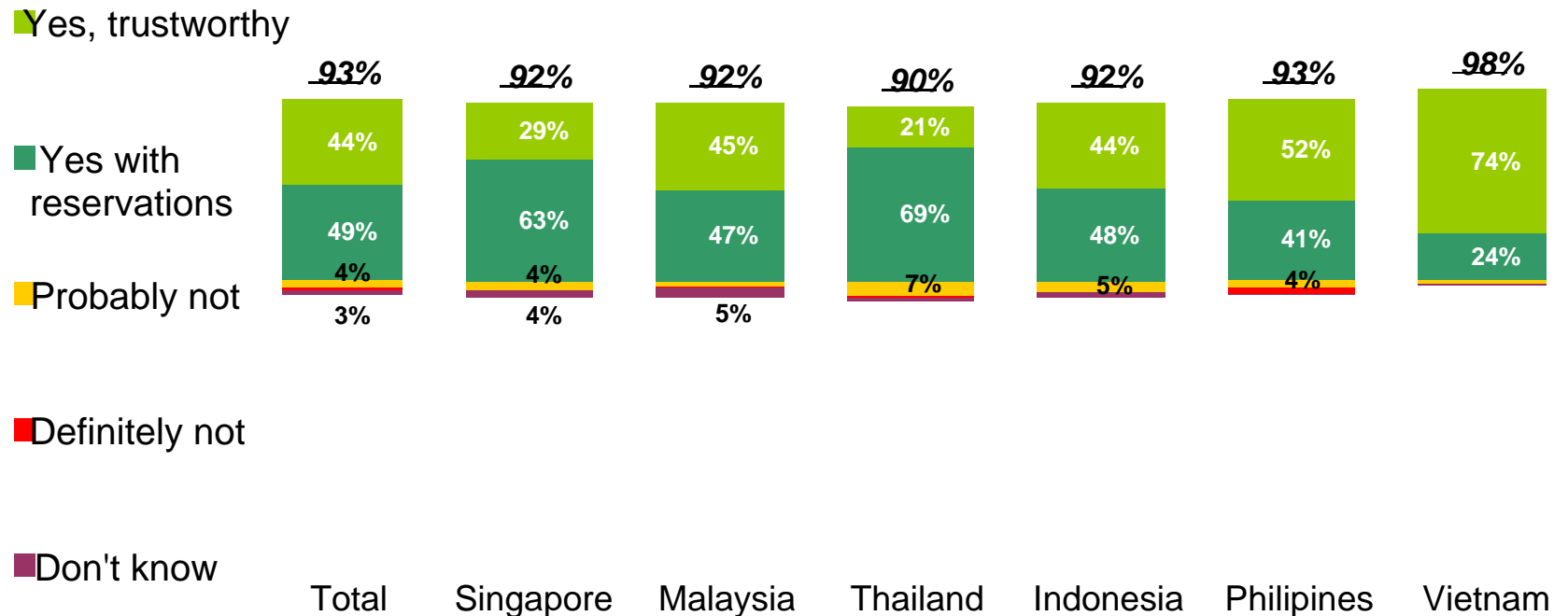


## How do you view the present relationship between your country and Japan ?



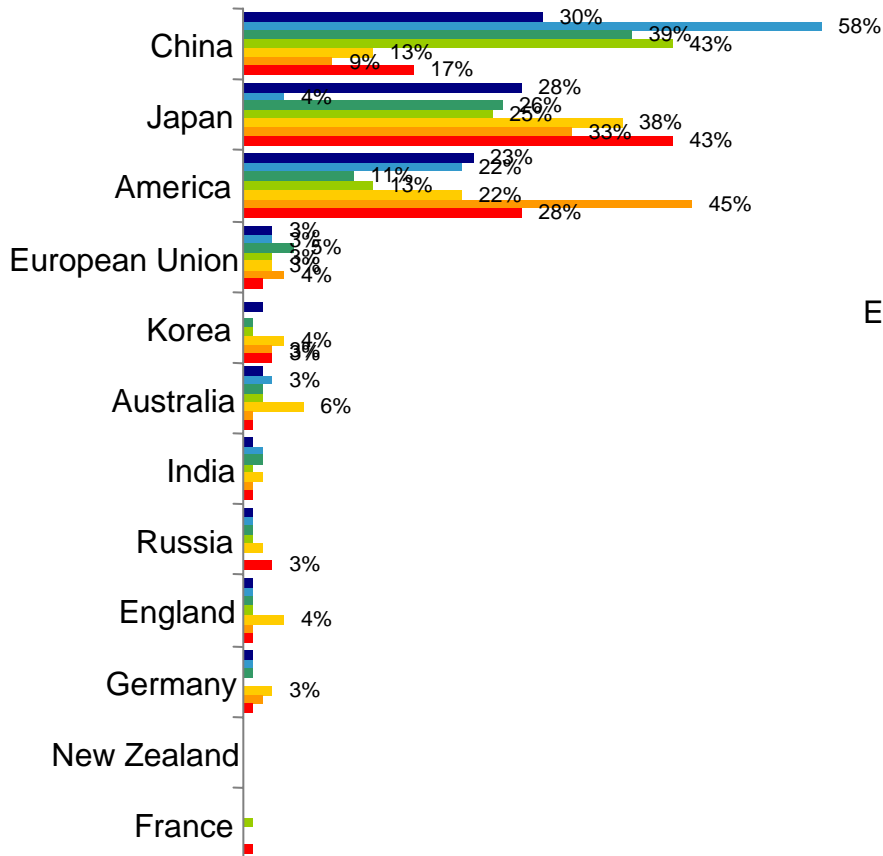


## Do you think Japan is a trustworthy friend for ASEAN countries ?

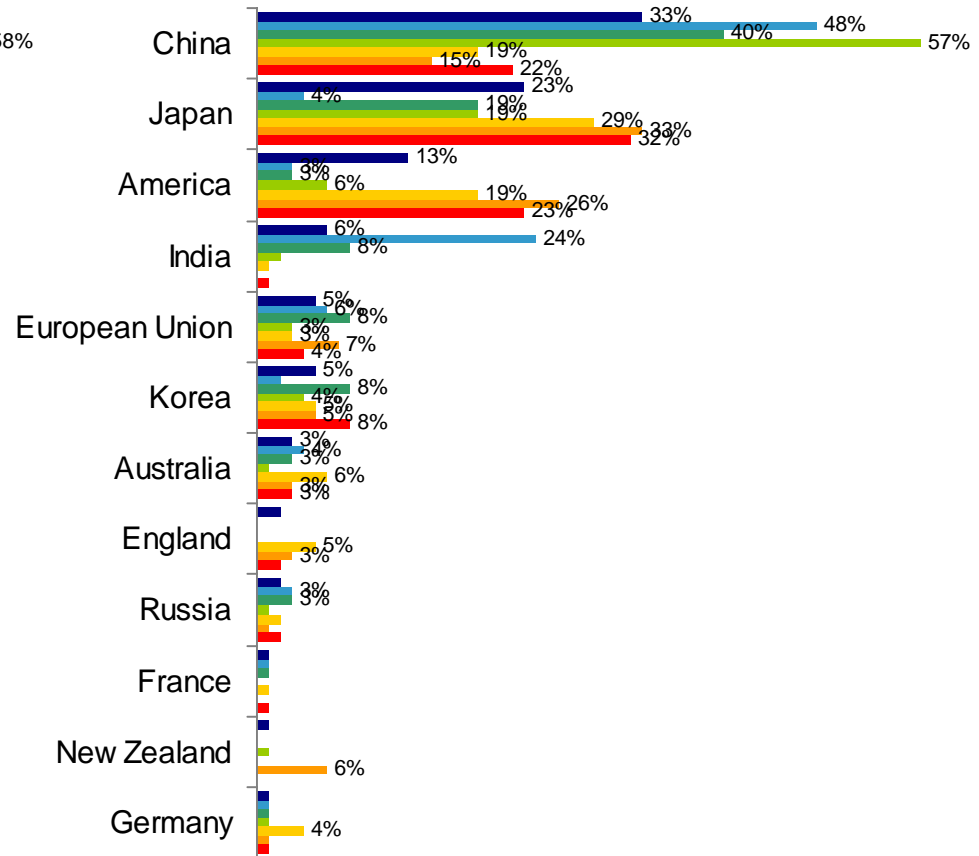




**For ASEAN countries, which of the following is currently considered an important partner? Please choose one answer.**



**For ASEAN countries, which of the following is considered to have the potential to be an important partner in the coming years**



■ Total   
 ■ Singapore   
 ■ Malaysia   
 ■ Thailand   
 ■ Indonesia   
 ■ Philippines   
 ■ Vietnam





**On a scale of 1 to 10, where 10 means strongly agree, and 1 means strongly disagree, how much do you agree with each of the following statements describing Japan?**

|   | Total     | Singapore | Malaysia  | Thailand  | Indonesia | Philippines | Vietnam   |
|---|-----------|-----------|-----------|-----------|-----------|-------------|-----------|
|   | %         | %         | %         | %         | %         | %           | %         |
| Technologically-advanced                                | <b>86</b> | <b>85</b> | <b>89</b> | <b>87</b> | <b>83</b> | <b>78</b>   | <b>94</b> |
| Economically-advanced                                   | <b>79</b> | 71        | <b>82</b> | <b>78</b> | <b>69</b> | <b>78</b>   | <b>95</b> |
| High standard-of-living                                 | <b>75</b> | <b>82</b> | 75        | <b>79</b> | <b>58</b> | <b>68</b>   | <b>90</b> |
| Beautiful natural scenery                               | 69        | <b>79</b> | <b>81</b> | <b>78</b> | 48        | 54          | 75        |
| Interesting culture                                     | 69        | 73        | 73        | 75        | 54        | 60          | 80        |
| Transmits contemporary cultures around the world        | 61        | 67        | 64        | <b>78</b> | 36        | 66          | 53        |
| Peaceful  | 57        | 45        | 62        | 47        | 50        | 60          | 78        |
| Democratic  | 45        | 39        | 50        | 50        | 28        | 45          | 59        |
| Cool  | 42        | 46        | 58        | 17        | 34        | 58          | 40        |
| Concerned with only its own economic growth and profits | 34        | 31        | 38        | 38        | 25        | 37          | 37        |
| People are difficult to understand                      | 24        | 23        | 19        | 23        | 21        | 32          | 28        |
| Oriented towards Europe and America                     | 23        | 23        | 32        | 18        | 17        | 26          | 23        |
| Warlike   | 12        | 9         | 5         | 7         | 13        | 17          | 20        |

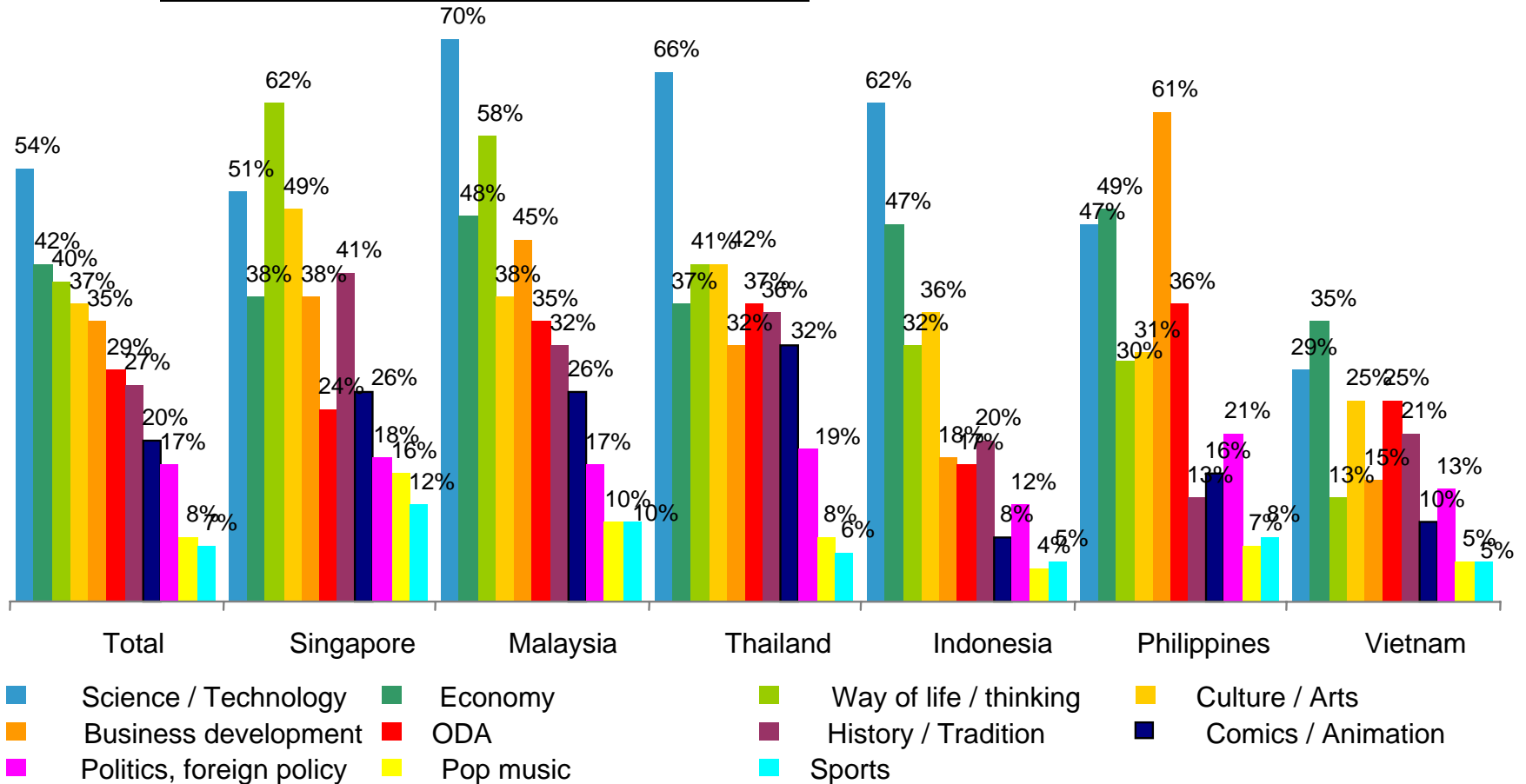


**On a scale of 1 to 10, where 10 means strongly agree, and 1 means strongly disagree, how much do you agree with each of the following statements describing the Japanese people?**

|                                     | Total     | Singapore | Malaysia  | Thailand  | Indonesia | Philippines | Vietnam   |
|-------------------------------------|-----------|-----------|-----------|-----------|-----------|-------------|-----------|
|                                     | %         | %         | %         | %         | %         | %           | %         |
| Hardworking                         | <b>81</b> | <b>70</b> | <b>86</b> | <b>72</b> | <b>78</b> | <b>86</b>   | <b>94</b> |
| Efficient                           | <b>72</b> | <b>70</b> | <b>72</b> | <b>80</b> | 45        | <b>79</b>   | <b>88</b> |
| Polite                              | <b>63</b> | <b>66</b> | 64        | 55        | <b>53</b> | 55          | <b>84</b> |
| Work well as a team                 | 62        | 53        | <b>69</b> | 68        | <b>55</b> | 55          | 74        |
| Traditional-minded                  | 56        | 51        | 40        | <b>71</b> | 27        | <b>59</b>   | <b>87</b> |
| Keep their promises                 | 50        | 32        | 49        | 54        | 38        | 54          | 74        |
| Obedient                            | 45        | 36        | 45        | 53        | 36        | 43          | 55        |
| Calculative                         | 41        | 16        | 24        | 57        | <b>53</b> | 56          | 44        |
| Kind/Compassionate                  | 38        | 33        | 35        | 34        | 36        | 38          | 50        |
| Cool image                          | 37        | 38        | 43        | 20        | 31        | 49          | 39        |
| Aggressive                          | 29        | 22        | 37        | 15        | 34        | 46          | 19        |
| Have closed minds                   | 19        | 25        | 12        | 19        | 11        | 17          | 29        |
| Arrogant                            | 17        | 16        | 18        | 22        | 9         | 18          | 18        |
| Copy what others do                 | 16        | 16        | 16        | 15        | 12        | 17          | 20        |
| Not reliable/Lacking in credibility | 10        | 8         | 8         | 12        | 3         | 14          | 13        |

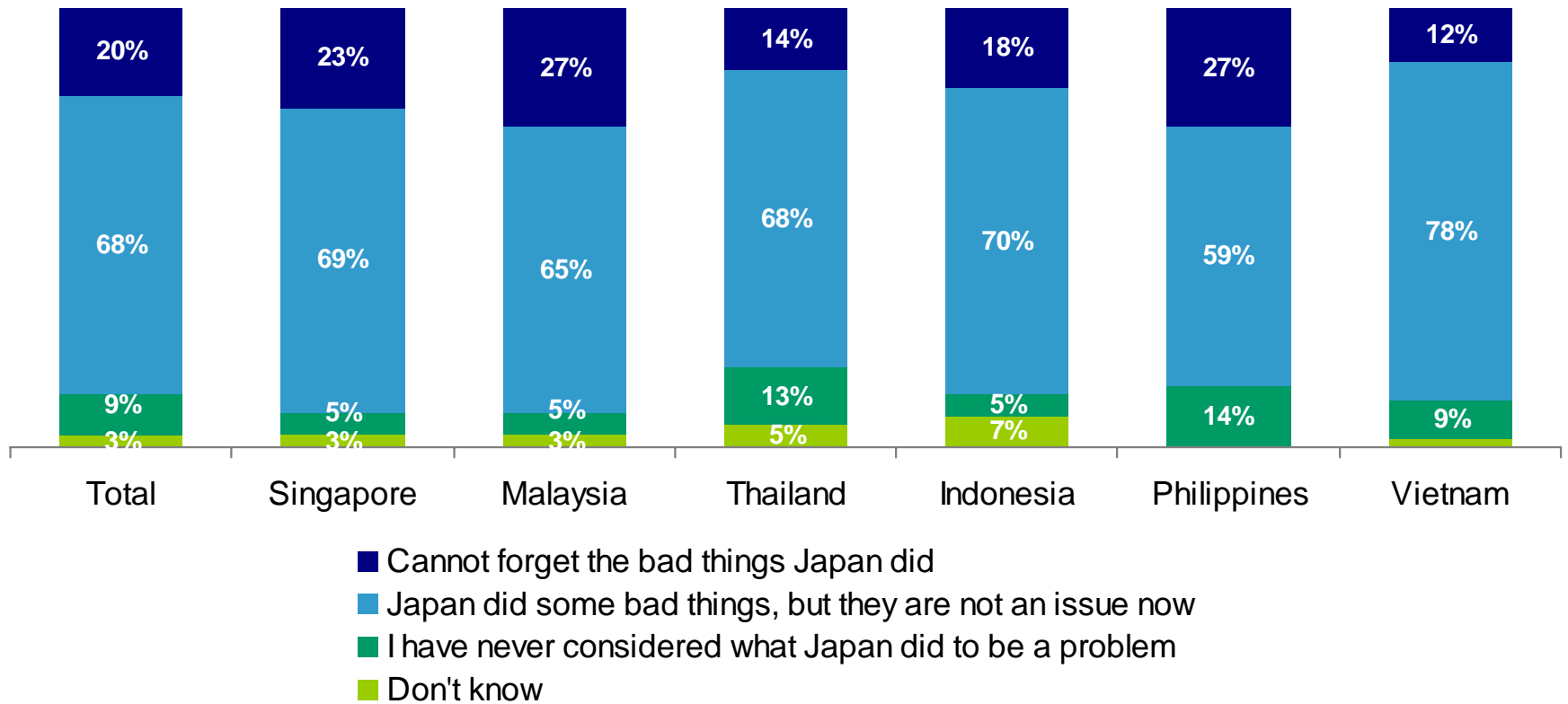


**Which of the following aspects of Japan would you want to know more about?**  
**Choose multiple answers from the following list.**





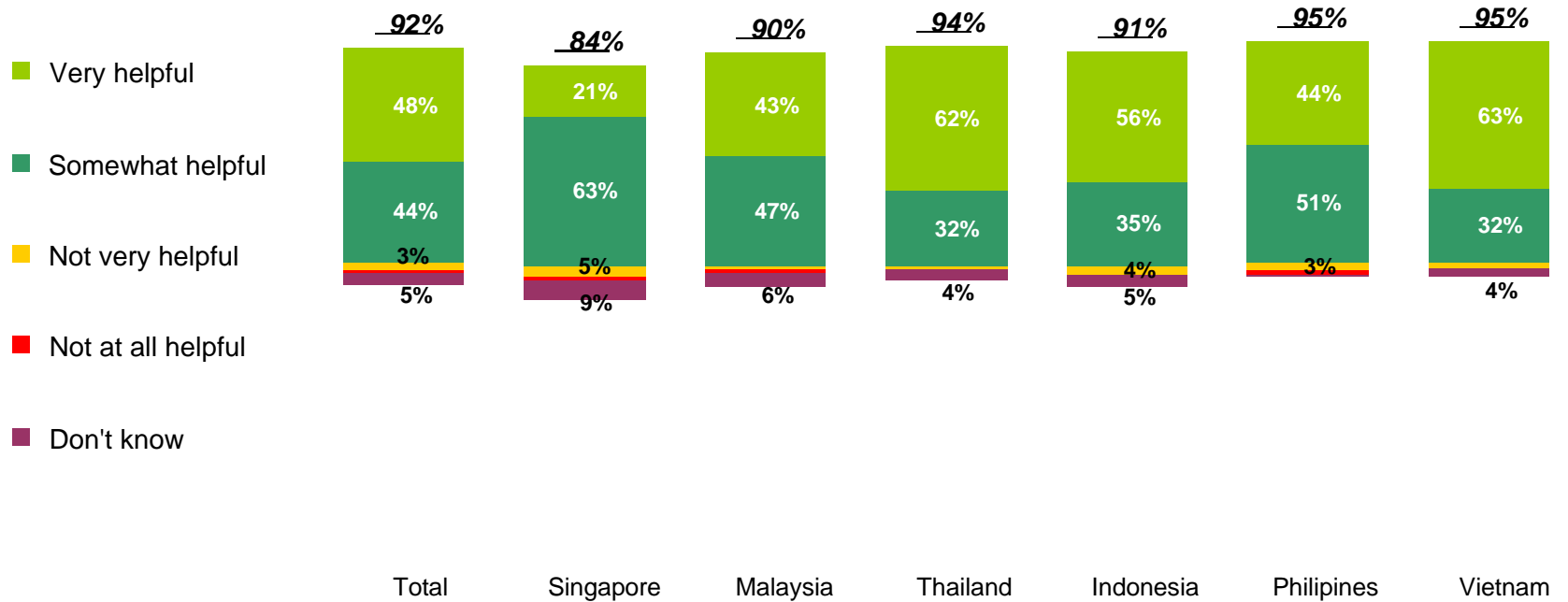
**What do you presently think about the acts of Japan during the World War II?**





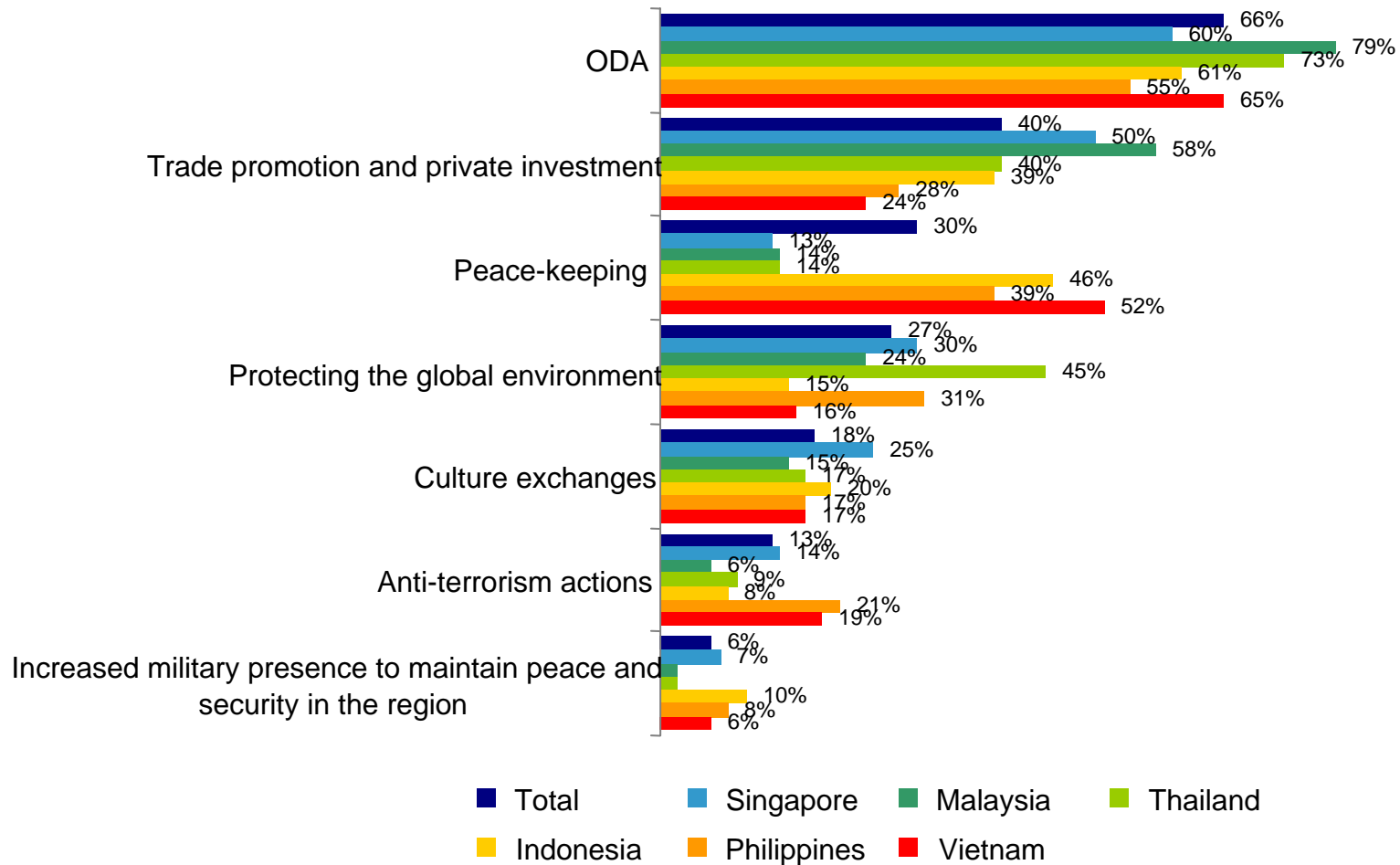


**To what extent do you think Japan's economic and technical cooperation (such as Official Development Assistance – ODA, excluding Singapore) is helpful in the development of your country?**



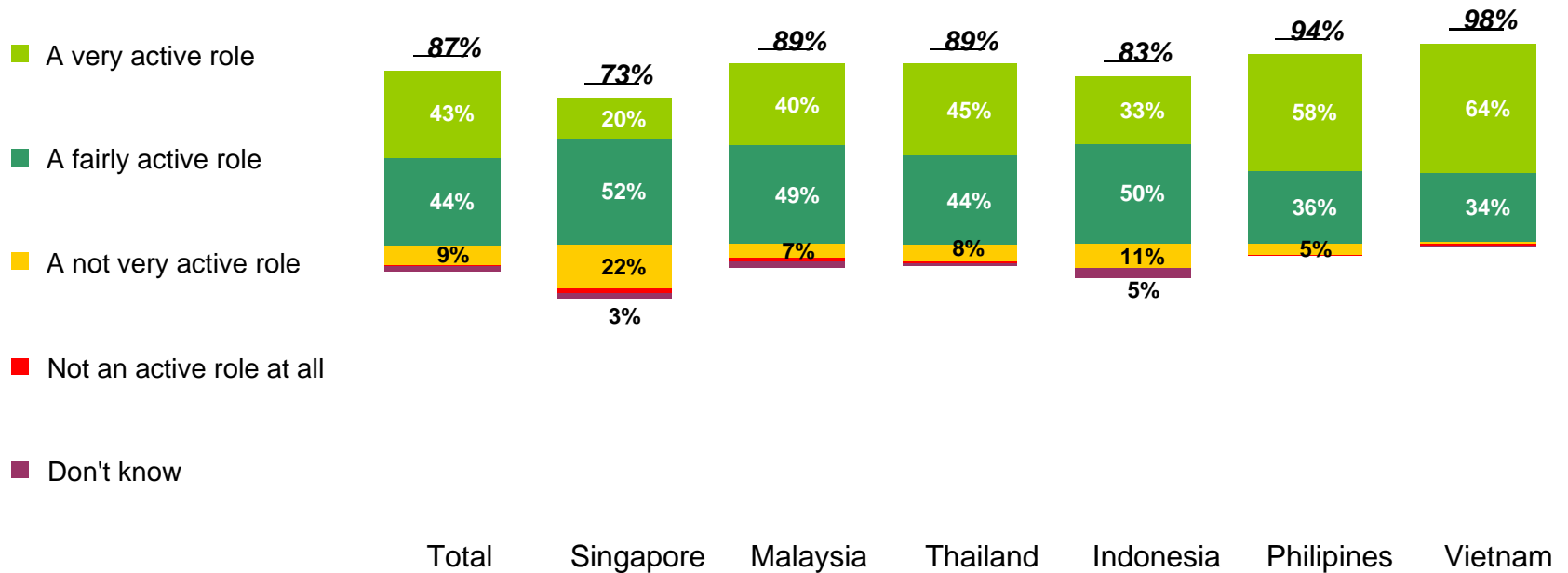


**Which of the following do you wish Japan to contribute most to in the region of ASEAN, including your country? Please choose two suitable answers.**



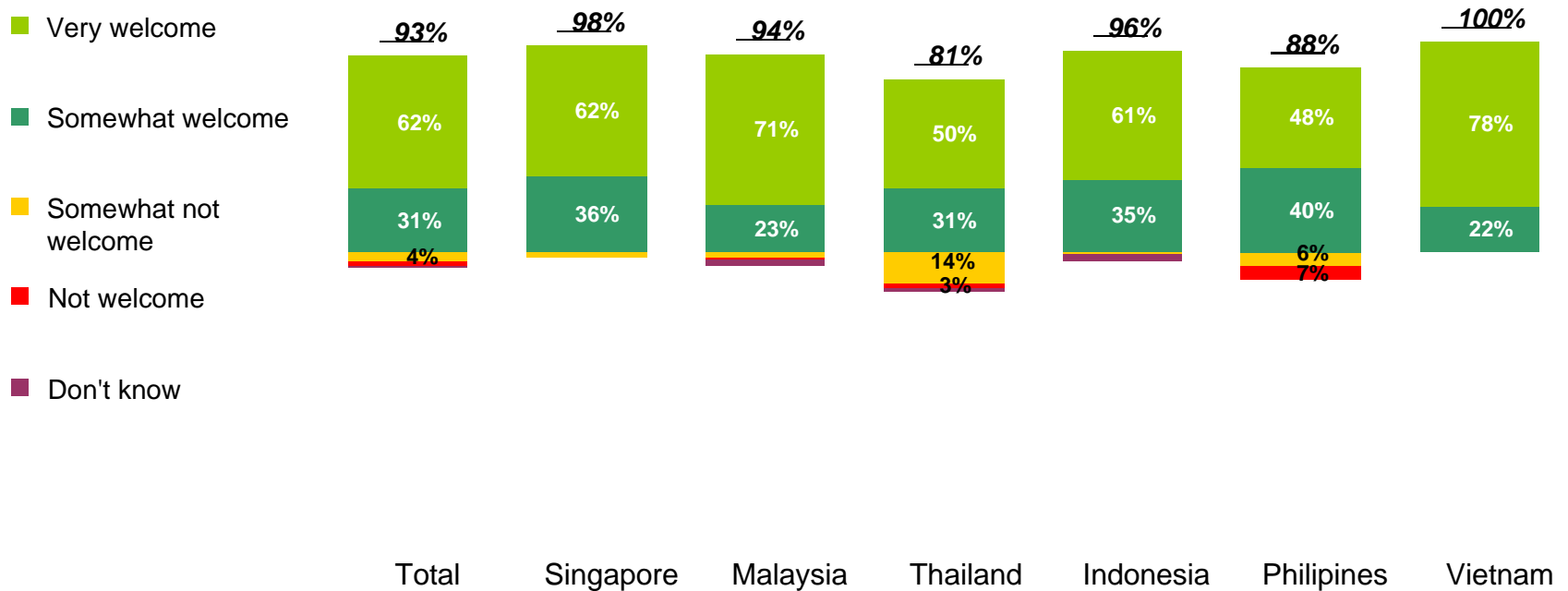


**Do you think that Japan, as an Asian country, is playing an active role in the development of Asia?**



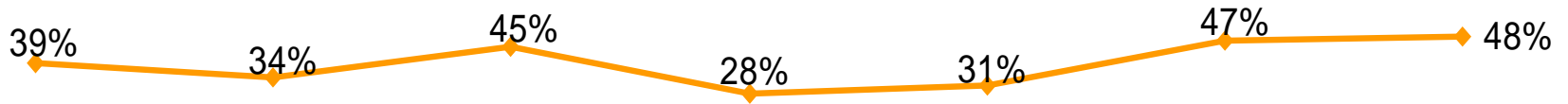


**How do you feel about Japanese companies coming to your country to establish factories and facilities? Would you say they are welcomed or not welcomed?**



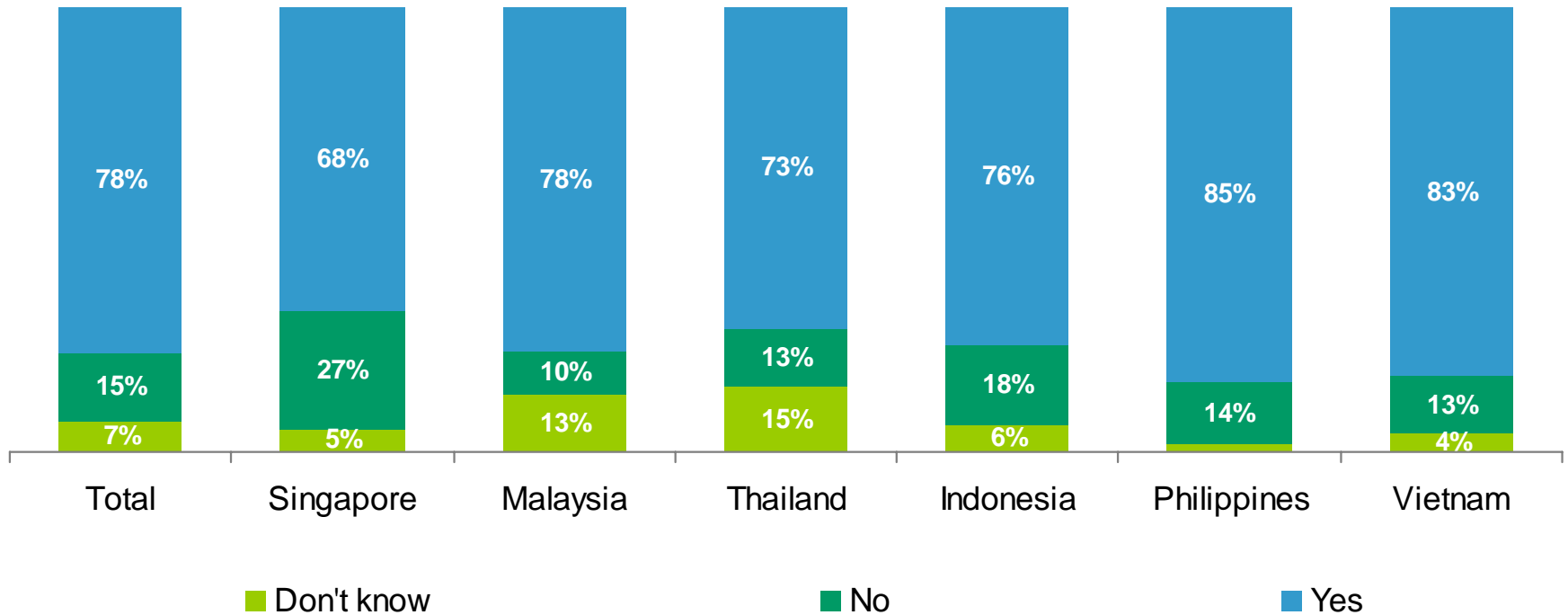


**Are you familiar with the workings of the United Nations Security Council (UNSC)?**  
**(The percentage of those who answered “Yes”)**



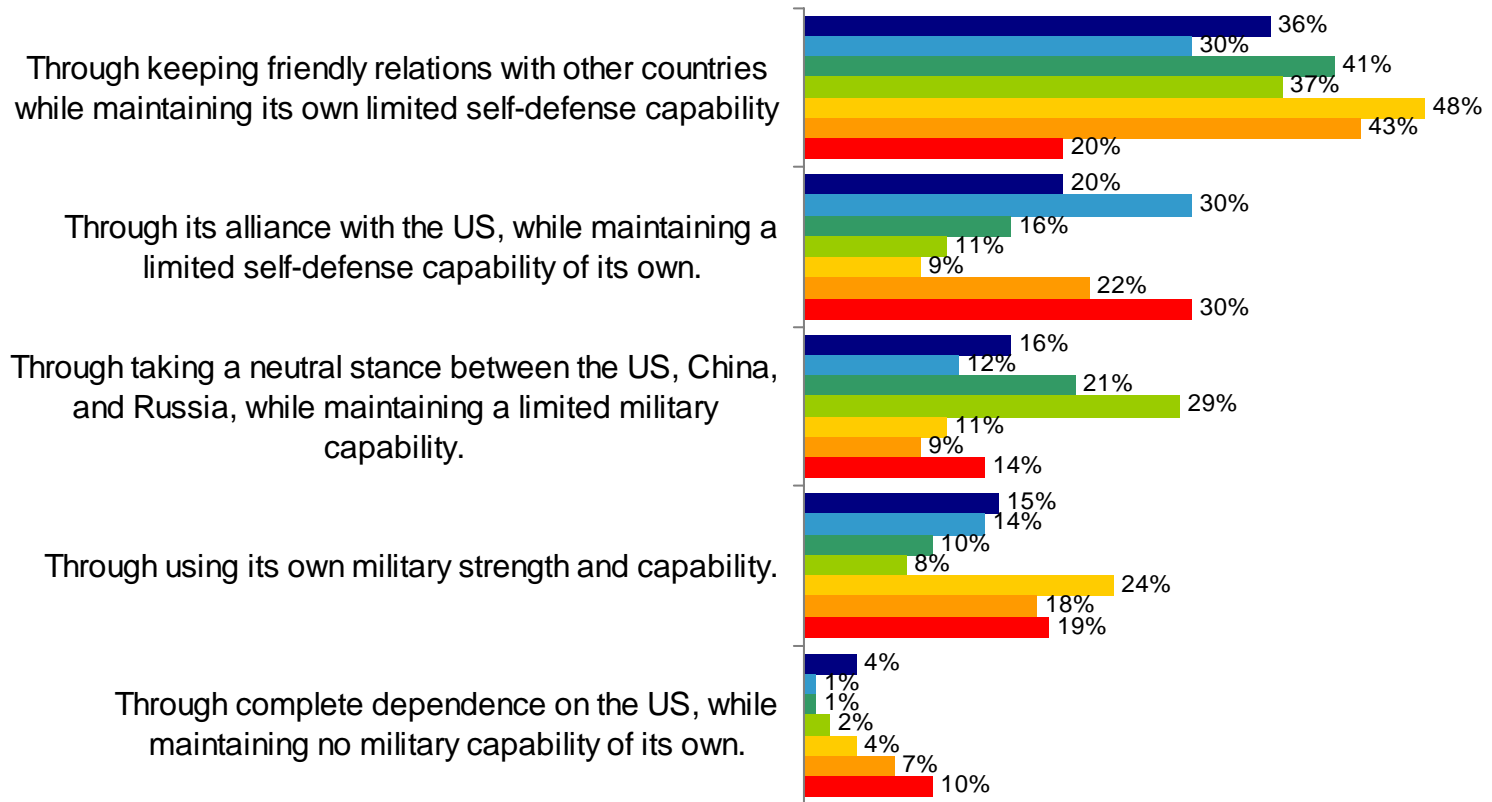
**For those who responded “yes” to the above question,**

**do you think Japan should become a permanent member of the United Nations Security Council (UNSC)?**





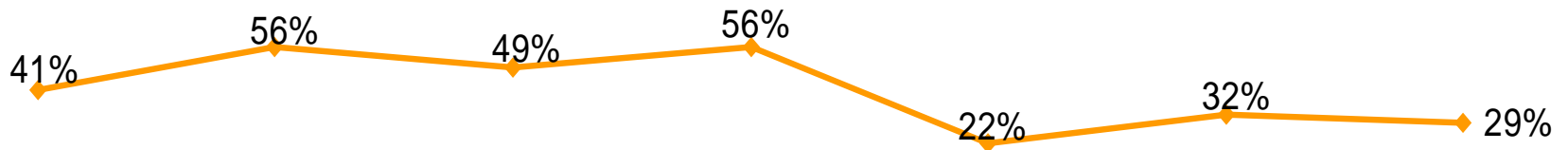
**Based on your knowledge, through what policy does Japan protect its national security?**



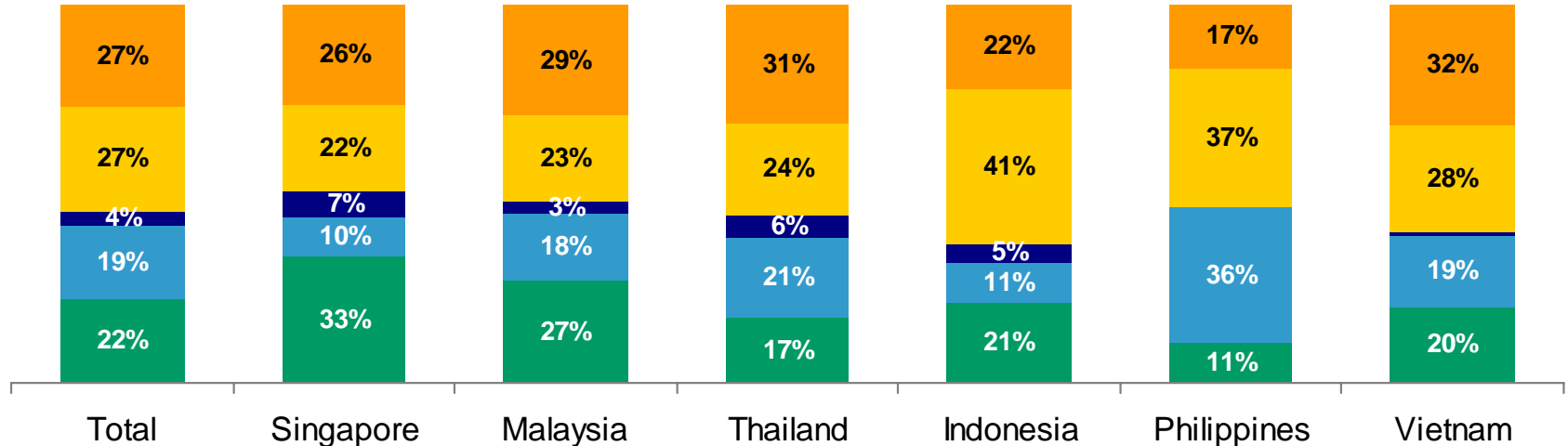
■ Total    ■ Singapore    ■ Malaysia    ■ Thailand  
■ Indonesia    ■ Philippines    ■ Vietnam



**Are you aware of the fact that Japan has concluded or is negotiating Economic Partnership Agreement (EPA) / Free Trade Agreement (FTA) with ASEAN Countries? (The percentage of those who answered “Yes”).**



**For those who responded “yes” to the above question, what do you hope to happen, regarding the Economic Partnership Agreement (EPA) / Free Trade Agreement (FTA) between Japan and ASEAN?**



Strengthen ties bet. Japan and ASEAN

More liberal people exchanges

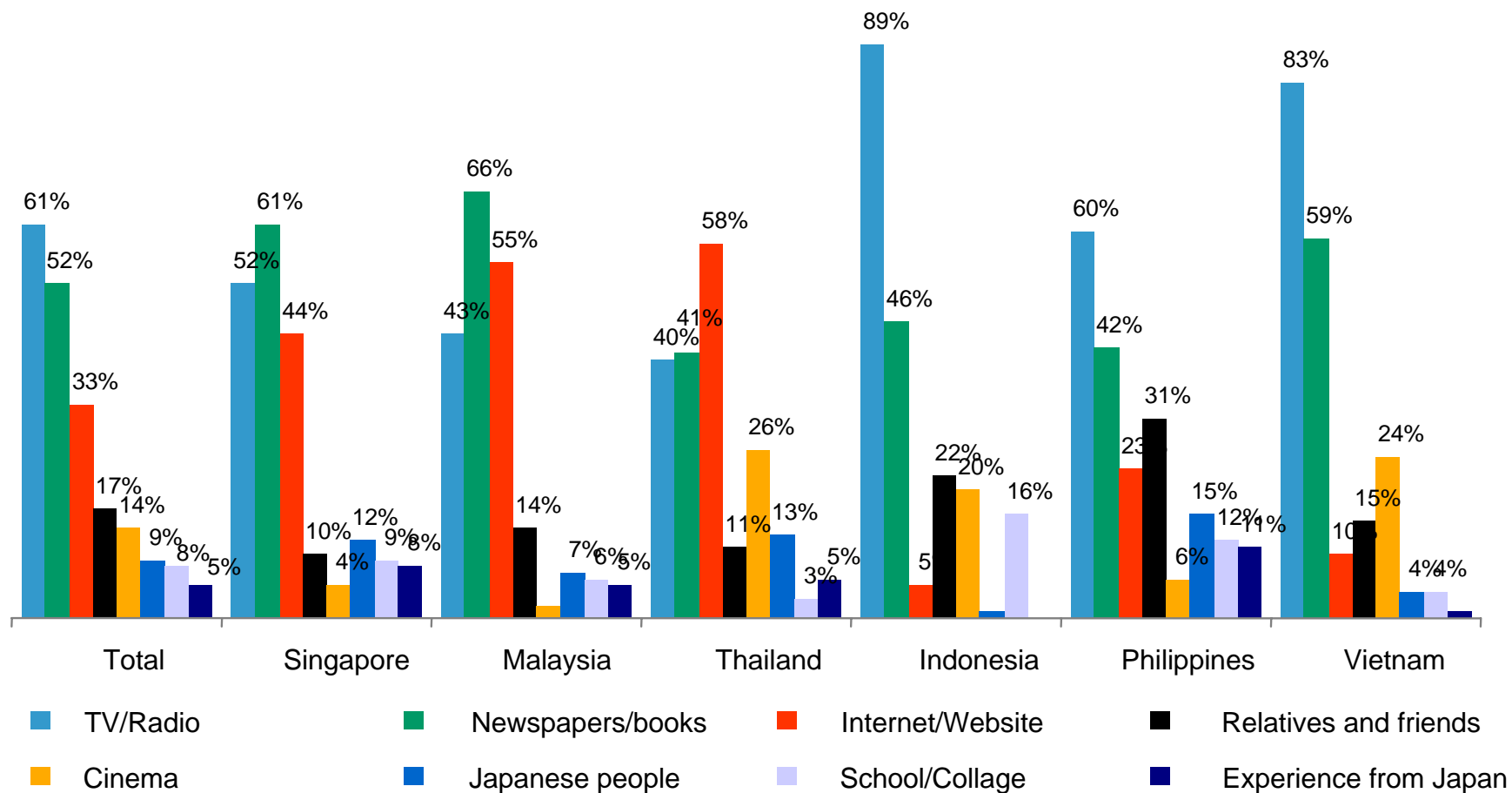
Investment, trade expansion

Technological support

Improve economic structure of ASEAN countries



**From which source did you obtain most of your knowledge of Japan?**  
**Choose two suitable answers from the following list.**





# Background and Objectives



- Managing a country's image has important implications for paving the way in many aspects of a country's dealings with the world – from attracting a steady flow of tourism, to lowering in-country barriers for overseas investment.
- As part of Japan's on-going efforts to ensure its foreign policies are in-line with public perceptions regionally, regular studies are conducted to explore the the level of knowledge and overall sentiments towards Japan and the Japanese culture.
- Results of such studies will serve as inputs into refining Japan's foreign policies to address any potential areas of concerns, and to continue strengthening efforts to direct the overall image of Japan.
- In 2008, the Ministry of Foreign Affairs, Japan commissioned TNS Singapore to conduct an Asean Opinion Study conducted in six Asian countries - Singapore, Malaysia, Thailand, Philippines, Vietnam and Indonesia.
- This documents details the results of the study. For any enquiries, please contact Shirley Cheung (tel : +65 6355 7919, email [Shirley.Cheung@tns-global.com](mailto:Shirley.Cheung@tns-global.com)) or Jovel Tan (tel : +65 6355 8137, email [Jovel.Tan@tns-global.com](mailto:Jovel.Tan@tns-global.com)) or Koh Hwei Ling (tel: +65 6355 7941, email [HweiLing.Koh@tns-global.com](mailto:HweiLing.Koh@tns-global.com))

# Coverage and Methodology



- The target respondents for this study are the general public in each of the countries covered. The general public are defined as Citizens or PRs of each country, aged 18 yrs and above.
  - Data collection is conducted randomly, and weightings based on age and gender are applied at the data processing stage to bring the sample profile in line with local population distribution.
- Data collection for this study was carried out from mid Feb to early March 2008. The locations covered in each country and the targeted sample sizes are as follows :

| <b>Country</b>              | <b>Singapore</b> | <b>Malaysia</b>                      | <b>Thailand</b>                  | <b>Philippines</b>            | <b>Indonesia</b>    | <b>Vietnam</b>       |
|-----------------------------|------------------|--------------------------------------|----------------------------------|-------------------------------|---------------------|----------------------|
| <b>Targeted Sample Size</b> | N=300            | N=300                                | N=300                            | N=300                         | N=300               | N=300                |
| <b>City coverage</b>        | Country wide     | Country-wide, but mainly urban areas | Country-wide, but mainly Bangkok | Metro Manila<br>Cebu<br>Davao | Jakarta<br>Surabaya | Ho Chi Minh<br>Hanoi |

- A mix of methodologies was deployed, for the most cost and time effective deployment in each country
  - Online via TNS's 6<sup>th</sup> Dimensional Access Panel – Singapore, Malaysia, Thailand
  - Face to Face - Philippines, Indonesia, Vietnam

# Sample Profile



- Weightings were applied to ensure sample profile is in line with population distribution in each country, for the location surveyed.

|                    | Total<br>n=1814<br>% | Singapore<br>n=302<br>% | Malaysia<br>n=308<br>% | Thailand<br>n=302<br>% | Indonesia<br>n=302<br>% | Philippines<br>n=300<br>% | Vietnam<br>n=300<br>% |
|--------------------|----------------------|-------------------------|------------------------|------------------------|-------------------------|---------------------------|-----------------------|
| <b>Gender</b>      |                      |                         |                        |                        |                         |                           |                       |
| ▪ Male             | 49                   | 48                      | 52                     | 47                     | 49                      | 48                        | 49                    |
| ▪ Female           | 51                   | 52                      | 48                     | 53                     | 51                      | 52                        | 51                    |
| <b>Age</b>         |                      |                         |                        |                        |                         |                           |                       |
| ▪ 18-19 yrs old    | 8                    | 8                       | 8                      | 11                     | 5                       | 8                         | 6                     |
| ▪ 20-29            | 27                   | 18                      | 27                     | 30                     | 29                      | 26                        | 31                    |
| ▪ 30-39            | 27                   | 24                      | 27                     | 26                     | 31                      | 31                        | 25                    |
| ▪ 40-49            | 21                   | 26                      | 22                     | 20                     | 21                      | 17                        | 18                    |
| ▪ 50-59            | 12                   | 19                      | 12                     | 10                     | 11                      | 11                        | 9                     |
| ▪ 60 yrs and above | 6                    | 5                       | 4                      | 4                      | 4                       | 7                         | 11                    |



Base : Total sample (n=300 per country)  
 Source : S2 – Gender  
 Source : S3 – Can you please tell me your age?

# Sample Profile



|                                 | Total<br>n=1814<br>% | Singapore<br>n=302<br>% | Malaysia<br>n=308<br>% | Thailand<br>n=302<br>% | Indonesia<br>n=302<br>% | Philippines<br>n=300<br>% | Vietnam<br>n=300<br>% |
|---------------------------------|----------------------|-------------------------|------------------------|------------------------|-------------------------|---------------------------|-----------------------|
| <b>Educational Level</b>        |                      |                         |                        |                        |                         |                           |                       |
| ▪ No formal education           | 0                    | 0                       | 0                      | 0                      | 1                       | 0                         | 1                     |
| ▪ Primary                       | 6                    | 2                       | 1                      | 1                      | 18                      | 8                         | 5                     |
| ▪ Secondary                     | 38                   | 19                      | 27                     | 11                     | 73                      | 40                        | 58                    |
| ▪ Junior Collage                | 6                    | 11                      | 10                     | 4                      | 0                       | 0                         | 7                     |
| ▪ Polytechnics / Diploma        | 14                   | 26                      | 22                     | 7                      | 3                       | 12                        | 11                    |
| ▪ Collage / Degree              | 32                   | 35                      | 30                     | 68                     | 3                       | 41                        | 16                    |
| ▪ Postgraduate                  | 5                    | 7                       | 9                      | 10                     | 1                       | 0                         | 2                     |
| <b>Social Educational Level</b> |                      |                         |                        |                        |                         |                           |                       |
| ▪ AB                            | 29                   | 45                      | 32                     | 32                     | 37                      | 10                        | 16                    |
| ▪ C                             | 30                   | 24                      | 36                     | 41                     | 48                      | 11                        | 18                    |
| ▪ DE                            | 42                   | 30                      | 32                     | 27                     | 15                      | 80                        | 67                    |



Base : Total sample (n=300 per country)

Source : D2 – Please tell me what is your highest attained level of education?

Source : D3 – Please tell me what is your monthly household income.

# Sample Profile



|                      | Total<br>n=1814<br>% | Singapore<br>n=302<br>% | Malaysia<br>n=308<br>% | Thailand<br>n=302<br>% | Indonesia<br>n=302<br>% | Philippines<br>n=300<br>% | Vietnam<br>n=300<br>% |
|----------------------|----------------------|-------------------------|------------------------|------------------------|-------------------------|---------------------------|-----------------------|
| Occupation           |                      |                         |                        |                        |                         |                           |                       |
| ▪ Business Owner     | 8                    | 7                       | 7                      | 9                      | 6                       | 17                        | 5                     |
| ▪ Senior management  | 2                    | 7                       | 4                      | 2                      | 1                       | 0                         | 1                     |
| ▪ Middle management  | 6                    | 15                      | 9                      | 7                      | 1                       | 1                         | 1                     |
| ▪ Junior management  | 8                    | 21                      | 14                     | 5                      | 1                       | 2                         | 6                     |
| ▪ Professional       | 8                    | 12                      | 17                     | 12                     | 2                       | 1                         | 5                     |
| ▪ Other white collar | 11                   | 11                      | 12                     | 21                     | 12                      | 6                         | 5                     |
| ▪ Blue collar        | 16                   | 3                       | 12                     | 5                      | 22                      | 22                        | 33                    |
| ▪ Homemaker          | 8                    | 5                       | 3                      | 3                      | 7                       | 12                        | 16                    |
| ▪ Student            | 13                   | 13                      | 13                     | 20                     | 4                       | 11                        | 17                    |
| ▪ Unemployed         | 12                   | 1                       | 1                      | 3                      | 42                      | 26                        | 1                     |
| ▪ Retirees           | 5                    | 4                       | 6                      | 4                      | 2                       | 4                         | 10                    |
| ▪ Others             | 3                    | 1                       | 3                      | 10                     | 1                       | 0                         | 0                     |



Base : Total sample (n=300 per country)  
Source : D1 – Please tell me what is your current occupation?