

Opportunities and Challenges for the Thai Content Industry Penetrating the Japanese Market¹

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Abstract

This paper examines the opportunities and challenges for the Thai content industry in penetrating the Japanese market. The objective is to identify strategic opportunities and unique challenges, focusing on cultural, economic, and market-specific factors. Employing a mixed-methods approach, the study analyzed secondary data on the Japanese entertainment industry and conducted in-depth interviews with key stakeholders. Findings indicate that while Japan's diverse media landscape and growing interest in international content present significant potential, especially for Thai Y-series (BL), the market is highly competitive. Challenges include language barriers, limited distribution channels, and complex regulations. Analysis using Porter's Diamond Model reveals strengths in Thailand's unique cultural offerings and creative talent but highlights weaknesses in market access and coordinated promotion. Recommendations include government-led initiatives fostering cultural exchange and collaborations with Japanese companies, alongside private sector strategies focusing on targeted marketing and subtitling for broader audience reach. A long-term, multifaceted approach is crucial for the Thai content industry to successfully navigate the complexities of the Japanese market and achieve sustainable growth.

Keywords: Thailand, Japan, Soft Power, Content Industry, Creative Economy

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1. Introduction

The content industry holds significant potential for rapid and sustained growth after a slowdown caused by the unprecedented COVID-19 pandemic. Recently, the content industry and soft power have gained increasing attention, as many countries strive to develop and export their cultures through creative content to boost their economies and enhance global influence. Japan is a promising market for the Thai content industry due to its vibrant entertainment ecosystem and demand for diverse narratives. With one of the largest media markets globally, Japanese audiences are increasingly open to foreign content, especially from Southeast Asia. Thailand's rich cultural heritage presents unique stories that can captivate local viewers, particularly younger demographics. Additionally, government support for Thai content creators enhances production capabilities and facilitates international collaborations. While challenges like cultural differences and strong local competition exist, the growing appetite for foreign content offers significant opportunities for Thai creators to successfully engage with the Japanese market.

This study aims to explore the strategic opportunities and unique challenges for Thai content industry in Japan, focusing on cultural, economic, and market-specific factors that could influence successful market entry and long-term growth. The study gathered and analyzed in-depth information on Japan, as a strategic targeted country to export Thai content industry, by focusing on various aspects from economic, social and cultural dimensions, and other factors relevant to the export of Thailand's content industry. The finding benefit both policymakers and the private sector by providing insights that can enhance content development, ensuring it meets high standards and is well-positioned for export to high-potential markets in the future.

2. Literature review

2.1 Content Industry

To study on the concept of content industry, the understanding of cultural industry is primary required, which highlights the significance creative cultural contents as the main driving force behind soft power, ultimately connecting it the content industry.

The cultural industry refers the industrialized production process of goods, from their creation to their integration into daily life, forming a continuous link. In addition, it encompasses both the conceptual and production methods of industry, including the distribution of products to markets or communities. This results in the widespread consumption and use of same products (Department of

Industrial Promotion, 2012). Another definition of the cultural industry is the integration of cultural and economic values, which can be enhanced through cultural products or by adding cultural elements to existing products. In other word, it perceives the culture through consumption. (Phenpinant, 2010, cited in Puanperm, 2017).

Many countries use the cultural industry as a tool for economic development. Culture, reflecting the local ways of life, becomes a commercial product aligned with global demands, markets and consumers because culture serves as a powerful soft power that can be absorbed unconsciously (Jetketkij, 2012).

Based on the abovementioned definitions, the cultural industry is closely related to the creative economy. The Royal Decree BE 2561 (CE2018), which established the CEA, defined the creative economy as an economic development driven creativity grounded in knowledge, intellectual property and research studies, and connected with culture, history background, social knowledge, technology and innovation. This combination develops new forms of production and services, increasing both economic and social values.

The key connection between the cultural industry and creative industry lies in the development and enhancement of country's culture through creative innovation. Both serve as mechanisms for economic development, transforming culture into industrial production and acting as essential tools for driving country's soft power. In this regard, the fluidity and overlap between the meanings of cultural and creative industries depend on the adaptation by different agencies, which use these concepts to promote soft power.

Ultimately, driving economic growth through the cultural industry involves exporting goods that feature creative packaging and content, delivering country's resources, values, policies and culture through industrial production to expand its economy for achieving global recognition.

Communication plays a critical role in transmitting culture through production, distribution, leading to cross-culture acceptance. Examples include films, series, music, games, advertisement, software, fashion, literatures, acting, cartoon, graphic, media, service and etc. These elements contribute systematically to production, creating standardized products for mass consumption and reproduction, collectively forming the content industry. However, according to the study of Jieping, Rijie, and Yaqiong (2011, p. 231), there is no universally agreed-upon definition of content industry. Different organizations provide varied definitions, with overlaps and divergences depending on context and usage.

This study found that cultural industry, content industry and digital content industry stem from leveraging cultural assets to enhance social and economic values while fostering global recognition. These industries are interconnected, with fluid boundaries that allow for adaption according to the objectives of various organizations.

A review of Thailand's content industry shows that the term 'digital content industry' is more commonly used, with a focus on animation, gaming and character industries. According to the Digital Economy Promotion Agency (DEPA), these sectors are key in promoting Thai soft power. DEPA's roles includes monitoring industry progress, developing knowledge, creating opportunities, building the fundamental, conducting workshops, expanding cooperation and creating awareness (Digital Economy Promotion Agency, 2020).

2.2 Japanese Market

Japan is a key player in the global content industry, with a growing domestic market and strong competition abroad. Advances in technology and rich cultures continue to drive the growth of Japan's content industry. Despite fierce domestic competition, Japanese content producers have been less proactive in exploring the new markets abroad. However, the interesting and unique appeals of Japanese contents have still allowed Japan to gain significant market share globally

Japan's content market is one of the largest in the world, comprising video-based content, audio-based content and text-based media. Historically, text-based media such as newspapers, magazines, and books, were highly popular in Japan. However, with the rise of online media, this sector is experiencing a significant slowdown, and newspaper sales are steadily declining (Statista, n.d.).

Moreover, Japan faces demographic challenges with a declining birthrate and an aging society, making working adults and the elders key consumer groups. Advances in technology have made it easier for Japanese consumers to access the entertainment contents from various countries, broadening their preference beyond domestic media.

Japanese media companies continue to dominate the domestic content and entertainment markets. Key players include NHK, Fujisankei, Asahi Shimbun, NTV, TBS, Yomiuri Shimbun, Toho, Mainichi Shimbun and Nikkei. Many of these companies not only operate in broadcasting but also own the newspapers and other media ventures. (Nakamura, Asari, Ichikawa, Hayashi, Yamada, & Yamaguchi, 2016). In addition, the Japan Business Federation, or Keidaren, play a crucial role in protecting the interests of Japanese business groups. It actively influences policy making and fosters cooperate with other countries both in bilateral and multilateral levels.

However, in the face of fierce competition, especially from South Korea, the Japanese Business Federation has expressed concerns about local companies losing the market shares to foreign competitors. In response, it has urged the government to intensify efforts in promoting the Japanese content industry, particularly in expanding the reach of animation and manga into foreign market to boost domestic growth. Besides, it is interested in attracting foreign talent to help develop the Japanese content industry, which is now facing a labor shortage (Nguyen, 2023).

The rising popularity of streaming service has further intensified competition in the entertainment sector, with Japanese companies striving to maintain their market share against global streaming giants.

Japan's media industries are governed by several key laws: including Broadcasting Act, Telecommunications Business Act, Radio Act and Wired Telecommunications Acts, enforced by the Ministry of Internal Affairs and Communications (MIC). Broadcasting on major media platforms requires an approval from the MIC, strictly oversees these activities. In contrast, online content is not subject to the same broadcasting laws (TMI Associates, 2021).

Japan also enforces strict censorship regulation and places significant emphasis on protecting intellectual property rights with the content industry, with severe penalties for violations.

3. Methodology

This research applied mixed qualitative research methods by 1) collecting data through document study and conducting a literature review of research on the entertainment industry as a driving factor for the economy and 2) Interviews with 6 key informants.

3.1 Data Collection

There are 2 parts of data collection as follows;

3.1.1 Data collection through document analysis and a comprehensive literature review

Data collection includes economic, social, cultural dimensions, or other issues related to content and entertainment media in Japan. Conduct detailed research and gather information about the content industry or the entertainment industry in Japan, such as major business information in the country, competition in the content or entertainment and media businesses, etc. This includes gathering information about agencies within the country, laws, regulations, and policies related to the regulation of the content or entertainment industry, media, or culture in Japan.

3.1.2 In-depth interview

In-depth interview with 6 key informants who are experts in Japanese content market and Thai content market. They are representing different stakeholders including academe, content industry as well as government sector. The interview was semi-structured, conducted face-face between January until May 2023.

3.2 Analysis

The analysis incorporated both documentary evidence and insights from interviews to derive meaningful conclusions. The findings were organized thematically, integrating specific insights from the interviews to enhance coherence and analytical depth. The research investigated the structural dynamics of the Japanese entertainment industry and the developmental trajectory of the Thai entertainment industry with the aim of establishing an analytical framework. Employing Porter's Diamond Model (Porter, 2011), the study assessed the competitive capacity of the Thai entertainment industry for entry into the Japanese market. The analysis focused on four principal dimensions: factor conditions, demand conditions, related and supporting industries, and firm strategy, structure, and rivalry.

4. Findings and analysis

4.1 Insights of Japanese Market and platforms

Japan's market is unique, and understanding its society and culture is essential for accessing the entertainment market, which can generate massive returns. Japanese consumers enjoy watching news, series, varieties, cartoon, anime and sports, especially baseball. With a strong tradition on reading, publishers and magazines, especially manga, remain popular, although they are gradually adapting to digital age and new technology.

Japan's entertainment industry is highly competitive, but opportunities to enter the market exist. The success of Western and Korean entertainment businesses demonstrates that it is possible to capture market share from local competitors.

Japan has one of the highest rates of TV viewership globally, and traditional media remains more popular than the online platforms. There are five major TV stations: NHK, TV Asahi, Fuji TV, Nippon TV (NTV) and Tokyo Broadcasting System (TBS). In addition, millions of Japanese viewers subscribe to cable TV. Most TV programs aired on mainstream channels are produced by Japanese companies, while foreign contents typically required a paid subscription (BBC, n.d.). Recently, Japanese TV stations have strategies to expand into foreign markets, especially in Asia. They collaborate with local media in each country to

produce or broadcast Japanese contents, especially manga, and often sponsor local partners in Asia to promote Japanese culture and tourism. At the same time, these partnerships create opportunity for Asian companies to broadcast their contents to Japanese audiences.

Additionally, many Japanese media companies have strong alliances or own multiple media outlets, such as TV, radio, or newspaper. For example, GMM TV, a Thai entertainment media, joined hand with TV Asahi to launch the first world exhibition ‘GMMTV EXHIBITION In JAPAN 2021’ at Roppongi Keyakizaka Museum. This event promoted GMM TV’s new series, especially ‘Y Series,’ which has gained popularity in Japan (MYAZY, n.d.). Following this strategy, it has helped GMM TV rapidly expand its fan base of Thai Y series in Japan.

In the meantime, the demand for Video on Demand (VOD) in Japan has surged. In particular during the COVID-19 pandemic, people had to stay home and streaming drama and movies became popular hobbies. The leading platforms- Amazon, Prime Video, Hulu, and Netflix- experienced significant growth. Additionally, YouTube has emerged as a key channel, enabling Japanese audiences to access the foreign dramas. Fans and content producers frequently uploaded foreign content, which helps introduce Thai Y series to Japanese viewers.

Japanese people primarily watch Thai dramas through streaming platforms, such as U-NEXT, Rakuten TV, TELASA and YouTube of GMM TV, which offers English subtitles or fan-subtitled content. Misato Tanaka, editor at Tokyo News Service which launched the Thai Drama Guide D magazine, mentioned in an interview with A Day website that Japanese fans are eager for Thai drama to gain more popularity. They are willing to pay for the memberships as a way of expressing their gratitude and supporting the production company, believing that their contributions will help fund further dramas (Hiranpruek, n.d.).

YouTube not only serves as an entry point for Thai dramas but also a crucial role in building a fanbase for Thai music in Japan. Many Japanese artists also start their careers by showcasing their songs on YouTube. Once gaining popularity and establishing their fanbase, they often hold concerts or sign contracts with music companies, and their music enters mainstream channels.

Key players in the Japanese music market include Avex Entertainment Inc., with subsidiaries like AWA (a streaming service company) and partnerships with Line Music; Creativeman Production, specializing in live production; Hostess Entertainment, found by Andrew Lazonby to introduce foreign music to the Japanese market, JVC Kenwood Victor Entertainment Corp., known for movie and anime soundtracks; and Tower Records Japan Inc., a major retail and streaming platform (Pastukhov, 2022). Cross-border collaborations have also

become more common, providing mutual benefits in market exploration. Notable J-pop and T-pop collaborations include remixes between Thailand's Luss and Japan's Chelmico, a featured song by Thailand's Waruntorn 'Ink' Paonil and Japan's Three 1981 band (St. Michel, 2023), and Apiwat 'Stamp' Ueathavornsuk, who launched a Japanese single under AVEX.

4.2 Strengths and weaknesses for exporting Thai content to Japan

While the Japanese market is highly attractive, it is also extremely competitive. Companies face not only intense competition among the Japanese firms but also the foreign companies seeking to capture market share. Japan's aging society has become a challenge for content industry, requiring companies to adopt strategies that cater to not only working-age customers but increasingly to the elderly population as well.

Moreover, the solid local business networks contribute to the fierce competition. Collaborating with the local partners can facilitate easier access to the markets. For foreign companies, the ability to communicate effectively in Japanese is essential, particularly for direct interactions with the customers. Fluency in Japanese offers a significant advantage and helps in building partnerships with local firms, which possess in-depth knowledge and a deep understanding on Japanese society (Kersey, n.d.).

Lastly, Japan's complex domestic rules and regulations make market entry difficult for foreign companies. These regulations sometimes benefit local companies. For example, Japanese media outlets have easier access to news sources from the government compared to foreign media. As the result, foreign media must become the members of the Japanese media association in order to attend the government press conference.

The COVID-19 pandemic contributed to the rise of Thai Y series in Japan, with word-of-mouth communication via social media driving rapid growth. One reason for this success is that Japanese audiences have long been familiar with boy-love contents through manga, though less via dramas or movies. However, as Japanese society has become more open, BL dramas have started to appear more frequently on TV and in films.

Interestingly, Thai Y series have gained more popularity than their Japanese counterparts. One key reason is that Thai Y series often feel more natural, similar to the style of manga, whereas Japanese Y series tend to feature exaggerated portrayals of male love. As Tanaka noted, Thai Y series mirror the content found in Japanese manga, offering fun and engaging love stories with kind-heart characters. Even if a character starts off flawed, the story usually ends

on a happy note. This contrasts with Japanese Y series, which often lack happy endings. (Hiranpruek, n.d.).

The growing popularity of Y series has led to an increase in Japanese tourists visiting Thailand. For example, HIS Tours launched an online merit tour in February 2022, which followed locations from the Y series '2gether' across Southeast Asia. Over 250 people participated, 99 percent of whom were women aged 40-50. Plans are also in place for future tours centered around locations featured Thai Y series (Lam, 2022).

A unique aspect of Japanese consumer behavior that support and drives the entertainment industry is the strong fan culture, which is dedicated to support artists and production companies for future works. Most fandoms in Japan revolve around idols, actors/actresses, singers and anime characters, with fierce competition among fans to gain access to their favorite artists or purchase limited-edition merchandise. Fans are willing to spend massive amount of money on these products and endure long waits for the chance to meeting favorite artists (Pastukhov, 2022).

According to Tanaka, Japanese people have a deep love for reading, especially long and in-depth interviews. They are also fascinated by costumes and props used by their favorite artists. For instance, costumes worn by members of Nogizaka 46 and Perfume were exhibited, along with launching photobooks. Fans are thrilled to see the actual costumes worn by their idols, and this sense of connection was similarly experienced during the GMM TV and TV Asahi's exhibition, where costumes and props from popular Y series were displayed up close (Hiranpruek, n.d.).

The study identifies several strengths and weaknesses of the Thai entertainment industry in the Japanese market. Strengths include the inherent appeal of Thai arts and culture to Japanese audiences, the strong potential of Thai artists and production teams, and the unique, more open nature of Thai content which differs from Japanese storytelling conventions. This creates opportunities for a niche market and strong brand loyalty. However, several weaknesses hinder market penetration. Limited access to audiences, primarily through online platforms, is a major obstacle, exacerbated by the language barrier. While fan subtitles exist, widespread understanding of Thai remains low. Furthermore, promotion of Thai content in Japan lags behind competitors, and there's a lack of integrated cooperation and continuity between the Thai government and private sector in promoting the industry's expansion into the Japanese market. Overcoming these challenges is crucial for sustained success.

The study provides systematical analysis by using various methods to demonstrate the possibility of Thai content industry for greater expansion in the Japanese markets as shown in Table 1.

Table 1 Analysis on strength and weaknesses of Thai content in Japan’s market

Strengths	Weakness
<ul style="list-style-type: none"> (1) Thai arts and cultures are very impressive for Japanese people. (2) Artists and production teams have a strong potential. (3) The content is more open, such as BL series, and different in the way of playing the story from Japanese series. 	<ul style="list-style-type: none"> (1) Channels to access audience are still limited; mostly via an online. (2) Only a few people can understand Thai language. However, there are a fan sub helping provide a subtitle to the general audiences for more understanding. (3) The promotion on Thai content in Japan’s market is less comparing to an increasing popularity. (4) There are no integrated cooperation and continuity among the government and private sectors in advocating the content industry to expand in Japan’s market.

Source: Author’s own analysis

4.3 Choices and challenges of exporting Thai content to Japan

This research used Porter’s Diamond Model to analyze the competitive capacity of the Thai entertainment industry to export to Japan. By considering four dimensions: factor conditions, demand conditions, related and supporting industries and strategy, structure, and rivalry to assess the strengths and weaknesses of the Thai entertainment industry. Table 2 analyzes the Thai content industry's position in the Japanese market using Porter's Diamond Model.

Regarding ‘factor conditions’, Thailand possesses several advantages. Its culture is appealing to the Japanese, who are familiar with and appreciate aspects of it. Furthermore, the Thai entertainment industry boasts talented artists and production teams, capable of creating high-quality content. The unique storytelling styles found in Thai content, particularly in the BL genre, offer something novel and different from existing Japanese offerings. This novelty, combined with strong brand loyalty among fans, creates significant market opportunities.

In terms of ‘demand conditions’, the Japanese market exhibits a strong preference for Thai content. Japanese consumers value novelty and seek out fresh

perspectives within the entertainment industry, making Thai shows attractive. The high level of brand loyalty exhibited by Japanese fans further strengthens the appeal of Thai productions.

Concerning 'related and supporting industries', the Thai content industry benefits from robust media and entertainment sectors, including strong streaming platforms and active online and social media communities. These contribute significantly to content distribution and fan engagement.

Table 2 Analysis on the Thai content industry in Japan's market by the Diamond Model

<ul style="list-style-type: none"> (1) Thai culture is impressive. (2) Artists and production teams have a strong potential. (3) Open and various forms of contents 	<ul style="list-style-type: none"> (1) Japanese people like and are familiar with Thai culture. (2) Japanese people want something new which there is no such a content in Japanese ones. (3) The tastes of consumers are various so it creates an opportunity to explore the market. (4) The royalty to the brand is very high.
Factor conditions	Demand conditions
Related and supporting industries	Strategy, structure and rivalry
<ul style="list-style-type: none"> (1) Media and entertainment industries (2) Streaming industry (3) Online and social media industries 	<ul style="list-style-type: none"> (1) The government cooperates with the private sector under integrated plans and strategies for continuity in promoting the content industry. (2) Japan's market is very unique and highly competitive. (3) Japan's laws and regulations as well as culture are peculiar and complicated.

Finally, analyzing 'firm strategy, structure, and rivalry', the report highlights the importance of government-private sector cooperation in promoting Thai content. The Japanese market itself is exceptionally unique, intensely competitive, and characterized by complex regulations and cultural nuances. The highly competitive and complex nature of the Japanese market, along with its specific regulatory environment and cultural expectations, presents a substantial challenge to Thai content producers. Successfully navigating this environment requires a carefully considered, long-term strategy.

5. Conclusion and recommendations

The findings and analysis reveal a complex interplay of opportunities and challenges for Thai content within the Japanese market. While Japan's diverse entertainment ecosystem and openness to foreign content present a significant opportunity, the market's intense competition and unique cultural nuances require careful consideration. The popularity of Thai Y-series demonstrates the potential for success by capitalizing on the unique strengths of Thai storytelling and cultural identity, particularly appealing to a younger demographic. However, this success is largely fueled by online platforms and fan communities, highlighting the need for greater investment in accessible distribution channels and marketing strategies to reach a wider audience. The dominance of established Japanese media conglomerates, coupled with regulatory complexities, underscores the need for strategic partnerships with local companies. Ultimately, success will hinge on a coordinated effort from both the Thai government and private sector to foster a long-term, strategically-informed approach to market entry and expansion, leveraging the unique strengths of Thai content while actively addressing the inherent challenges of the Japanese market.

5.1 Strategies and measures for the government

The Thai government should adopt strategic, long-term plans to promote the content industry and explore global markets. Hosting events such as "Thai Festivals" and cultural promotions in Japan would enhance awareness and appreciation of Thai culture among Japanese audiences. Furthermore, supporting cultural activities—such as workshops on Thai traditions, cooking classes, and Thai language lessons—will engage Japanese individuals interested in Thailand.

Facilitating connections between Thai content producers and local Japanese producers is essential for exploring the nuances of Japan's media landscape. The government should assume the role of a facilitator rather than a supervisor, allowing content creators the freedom to develop a globally recognized Thai identity. Just as Japan markets its culture through dramas and products that convey the spirit and essence of its traditions, Thailand can similarly leverage its cultural narrative.

Moreover, the government can create platforms for Thai cartoons to achieve international recognition, promoting the production of manga that encapsulates Thai identity, akin to Korea's manhwa. By fostering an environment that encourages creativity without exerting control, the Thai government can significantly enhance the global presence of Thai content.

5.2 *Strategies and measures for the private sector*

Building partnerships with local companies is essential for effectively promoting Thailand's content industry in Japan, a highly competitive and complex market. To enhance access to Thai content, particularly through online platforms, Thai firms should prioritize providing subtitles for Japanese audiences. Additionally, organizing events such as fan meetings and exhibitions can significantly broaden the Thai fan base in Japan.

Thailand has the potential to connect with Japan through various mediums, not limited to dramas, but extending to print media and manga. Therefore, it is imperative to support the growth of Thai cartoonists and encourage the production of content tailored for the Japanese market. Manga has evolved beyond its traditional association with children's entertainment; those who embraced manga in their youth often continue to appreciate it as adults. Consequently, Thai content must adapt to market dynamics and create innovative works that cater to the evolving preferences of these audiences.

Moreover, expanding the market to increase demand through improved income and welfare initiatives can attract talented individuals to creative roles, fostering collaboration to produce high-quality work in the content industry.

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