



**日本証券業協会**  
Japan Securities Dealers Association

# **JSDA's Financial Literacy and Education Support Activities for the Younger Generation**



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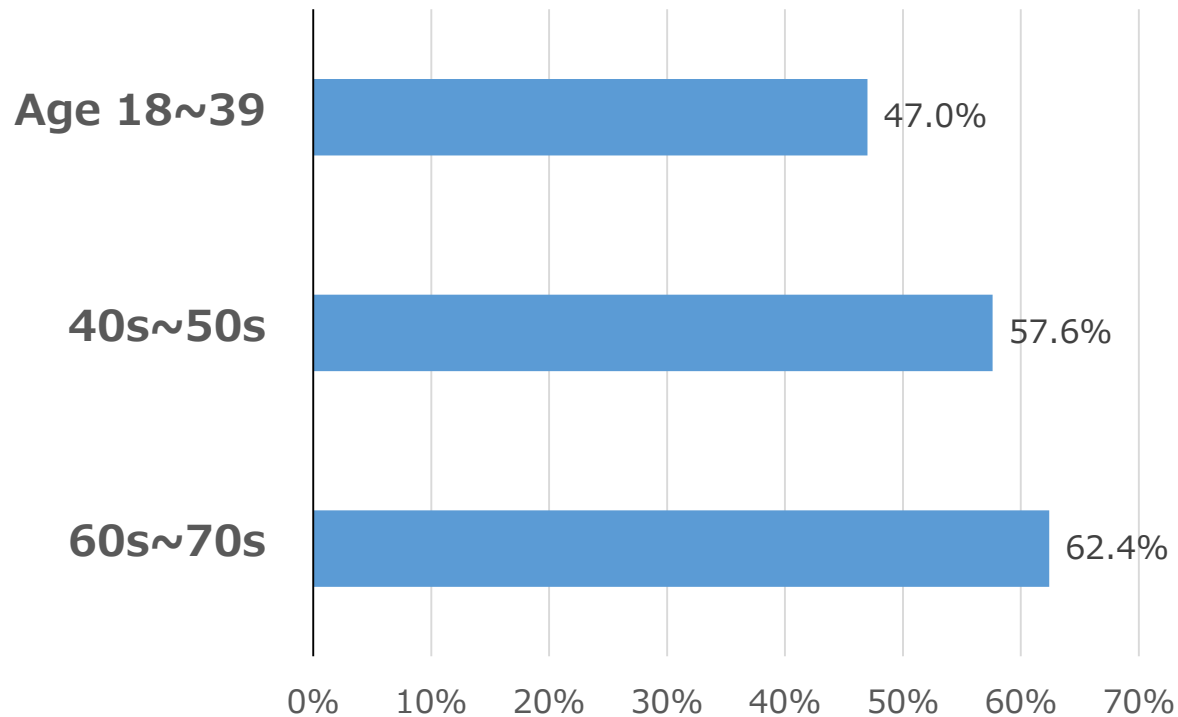
- ◆ **Financial Literacy in Japan**
- ◆ **JSDA's FC/IE activities for the younger generation**
- ◆ **Investment awareness survey and the result**
- ◆ **Future measures by JSDA**

# Financial Literacy in Japan

# 1. Awareness of investment among Japanese younger generation

## (1) Financial literacy

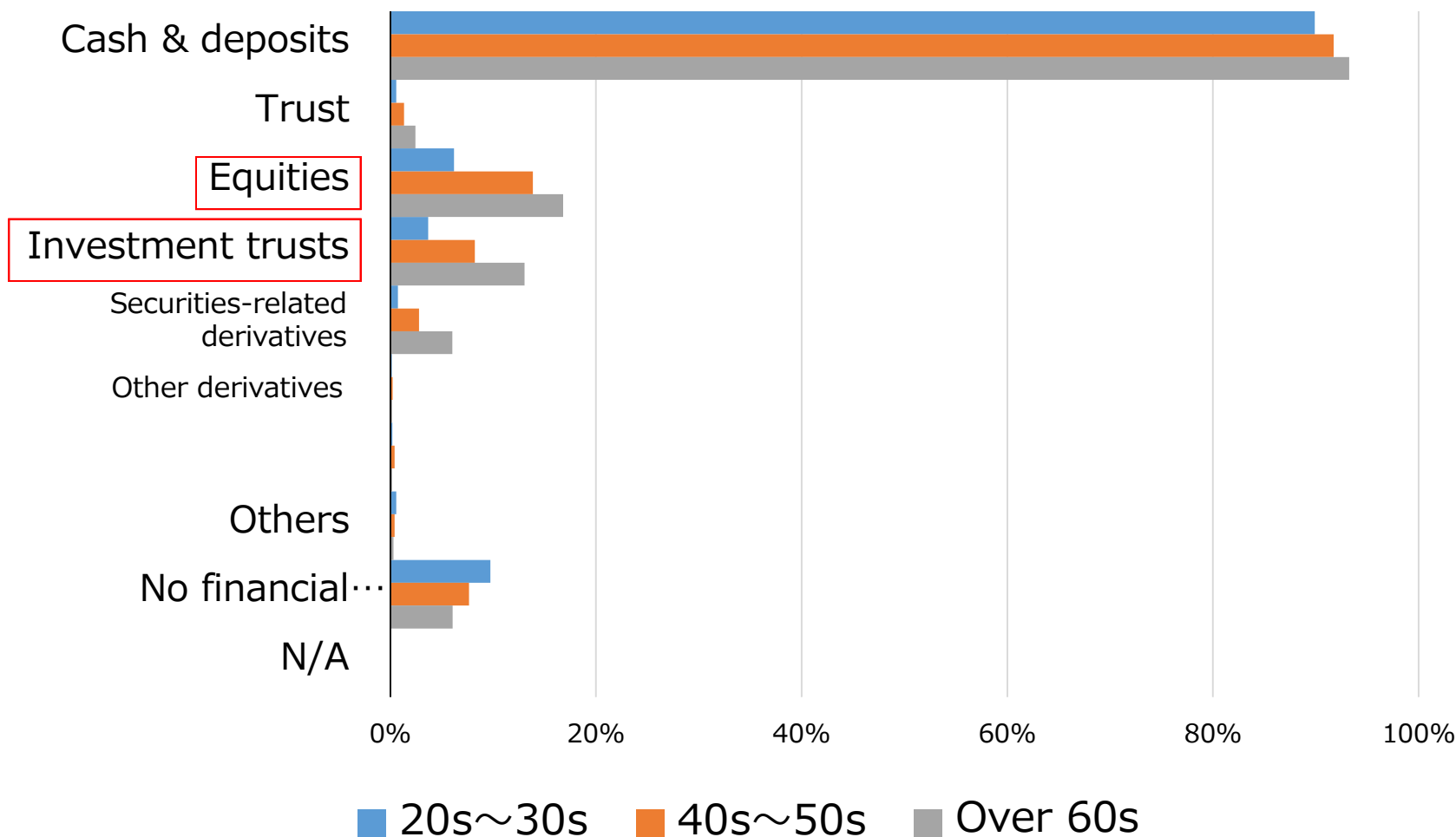
### Percentage of correct answers given to true/false questions on "financial knowledge" by age groups (total 25 questions)



Source: Central Council for Financial Services Information "Financial Literacy Survey", June 2016

# 1. Awareness of investment among Japanese younger generation

## (2) Financial products holding ratio

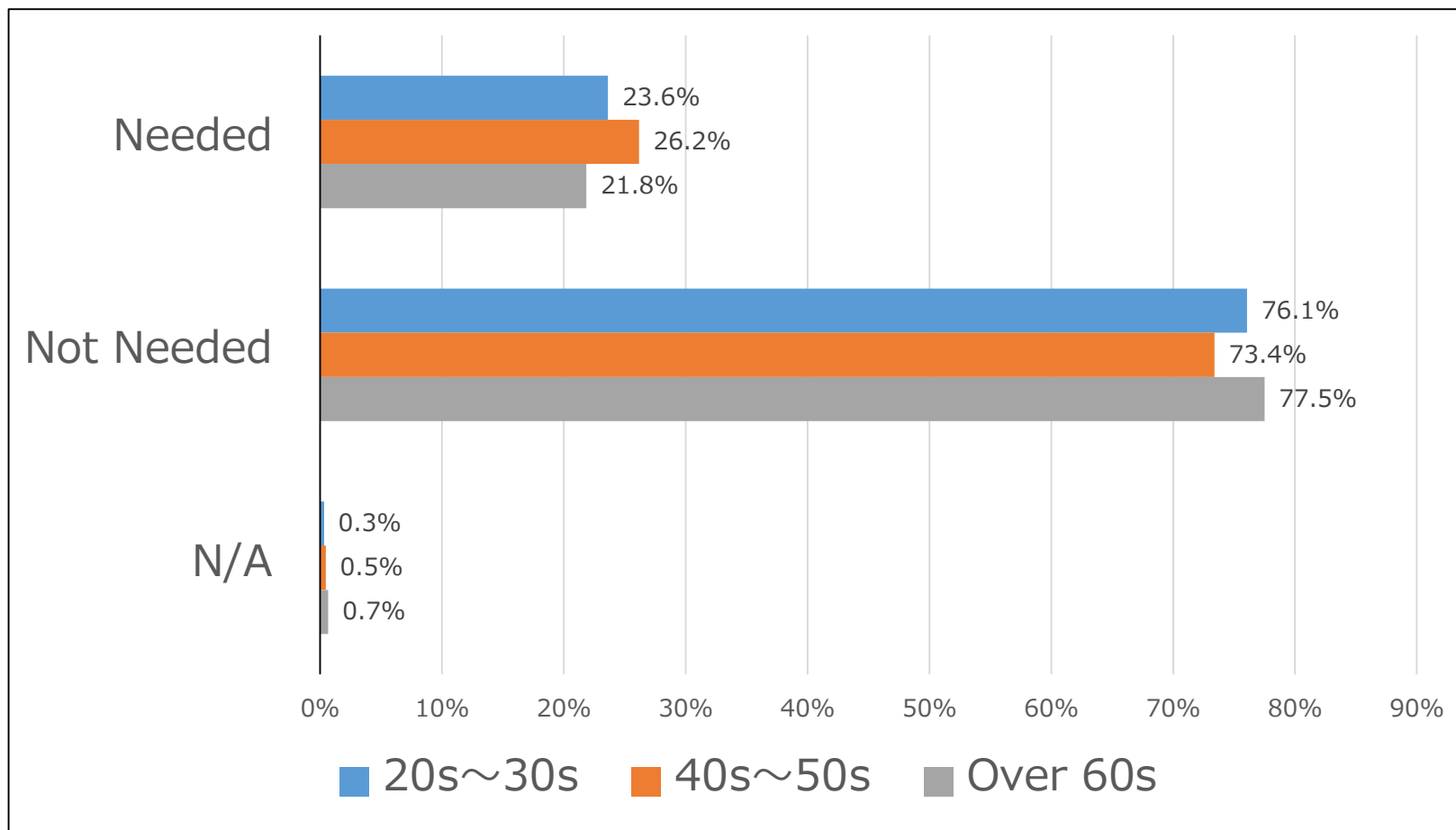


Source: *National Survey on Securities Investment*, JSDA, FY2015

# 1. Awareness of investment among Japanese younger generation

## (3) Recognition of investment needs

Q: Securities investment is...

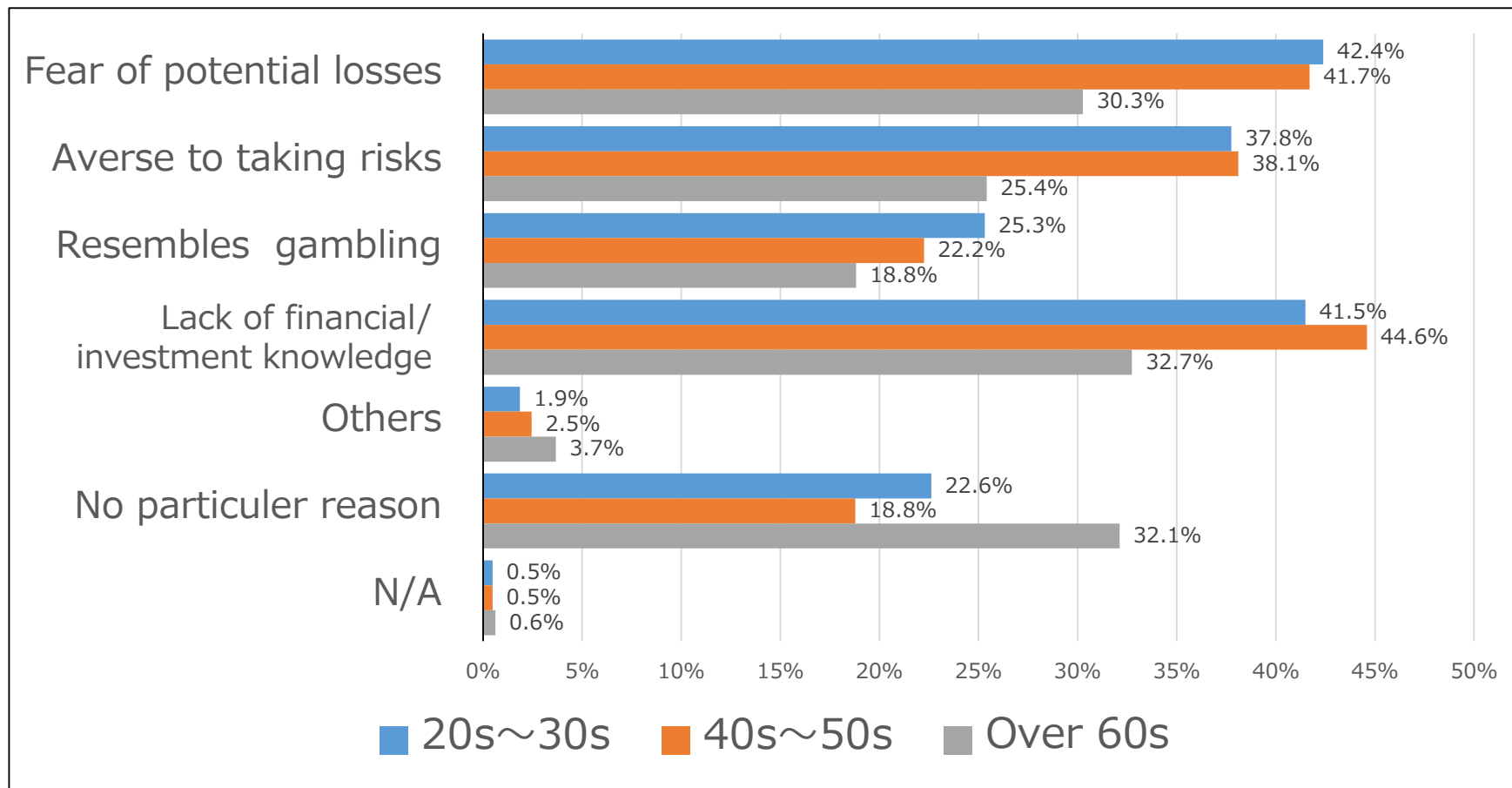


Source: *National Survey on Securities Investment*, JSDA, FY2015

# 1. Awareness of investment among Japanese younger generation

## (3) Recognition of investment needs

### Reasons for not needing securities investment (multiple choice)



Source: *National Survey on Securities Investment*, JSDA, FY2015

# **JSDA's FC/IE activities for the younger generation**



## 2. JSDA's FC/IE activities for the younger generation

# Activities for Schools

**Elementary  
Schools**

**Junior High  
Schools**

**High  
Schools**

**Universities**

**Teaching Materials**  
Readers, Game, etc.

**Seminars for  
teachers,  
etc.**

**Seminars for  
Students,  
etc.**

**PR**

**Information Magazine, Website**

**Visiting Lectures**

**Support/Collaboration**  
for Study Groups and Student Groups

**Participation in International Conference**

### ① For elementary, junior high, and high schools “Challenge! Snack Co. Ltd.”

#### Experience-based study

on how a stock company works through product development and funding of a snack company

1. Launch the company
2. Produce the product
3. Present the product to the class
4. Invite to investment by students



◆Product package made by students

## 2. JSDA's FC/IE activities for the younger generation Teaching Material(1/2)

### ① For elementary, junior high, and high schools “Challenge! Snack Co. Ltd.”



◆Class activity



◆Product package made by students

### ② For universities **Financial Literacy “Home Delivery” Lectures**

**awareness of the importance  
of asset management**

- **financial planning**
- **securities investment**
- **financial markets, etc.**



◆Lectures at universities

## 2. JSDA's FC/IE activities for the younger generation

# Activities for Adults

**Young Adults**

**Adults**

**Senior**

**Web Contents,**

**Movie, Manga, Reading Material, Electronic Book App, etc.**

**Publication**

**Introductory text for Investment, Q&A of Taxation System, etc.**

**Seminars and Events, etc.**

**Visiting Lectures**

### ○ For young working population “Securities Investment Day” Annual Events

- October 4<sup>th</sup>
- a number of events are held nationwide
- appeal significance and attractiveness of securities investment.
- Providing the “key messages” of World Investor Week

#### Investment Seminars (FY2017)

- 2,673 people
- 29 seminars
- in 9 regions

#### Designated Website

- (Sep-Nov 2017)
- 298,419 page views



## 2. JSDA's FC/IE activities for the younger generation Seminars & events

### ○ For young working population “Securities Investment Day”



◆Seminar participants



◆Designated website image

## 2. JSDA's FC/IE activities for the younger generation **Web content (1/2)**

### ① For young working population: **Online video program** **“Start today! Asset Management and Securities Investment”**

By referring to the contents of FC/IE publications by JSDA,



◆Video scene



### ① For young working population: **online video program** **“Start today! Asset Management and Securities Investment”**

Financial planners explain investment in the short videos.

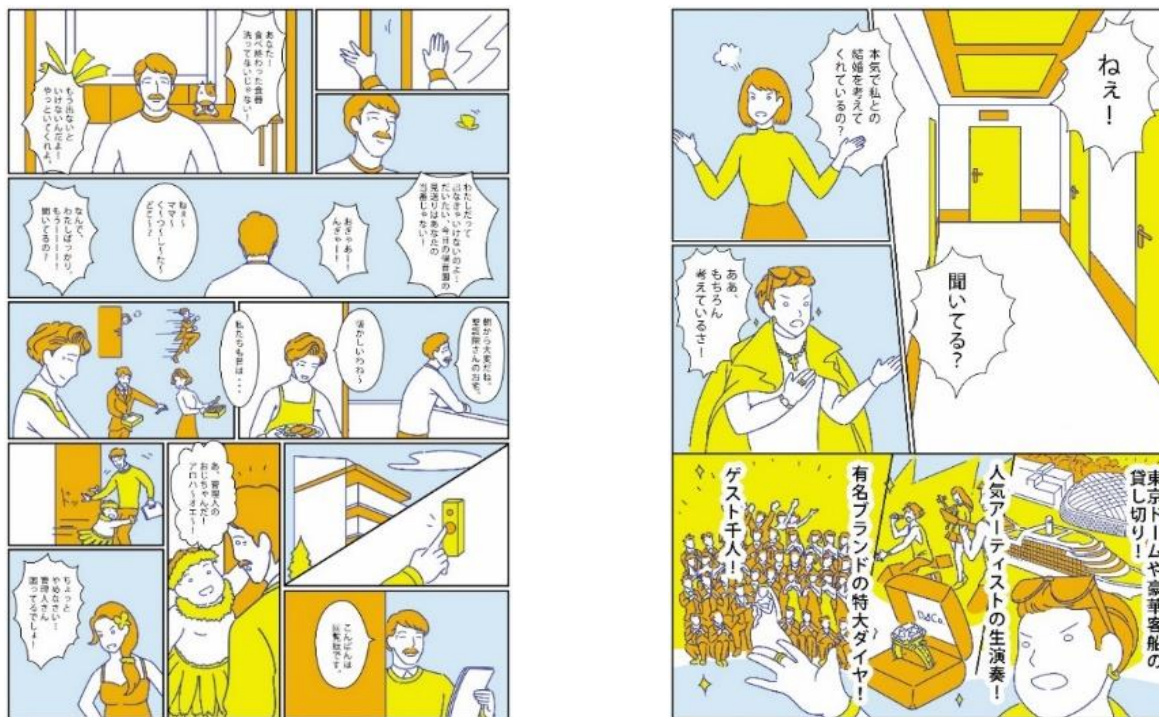


◆Video scene

## 2. JSDA's FC/IE activities for the younger generation Web content (2/2)

### ② For young working population: Online comic “Shoken-san the Apartment Manager”

A series in which *Shoken-san* (an apartment manager) solves the financial problems of his neighbors



◆ Online Comic

# **Investment awareness survey and the result**

#### Objective

- ✓ To identify the potential barriers preventing changes in awareness and behavior of young people (20s~30s) yet to invest and the necessary triggers for them to start investing
- ✓ To evaluate existing JSDA web content and identify improvement strategies

## Survey flow

- ① **Group interviewing** (finding out the processes and triggers that prompted people to start investing)

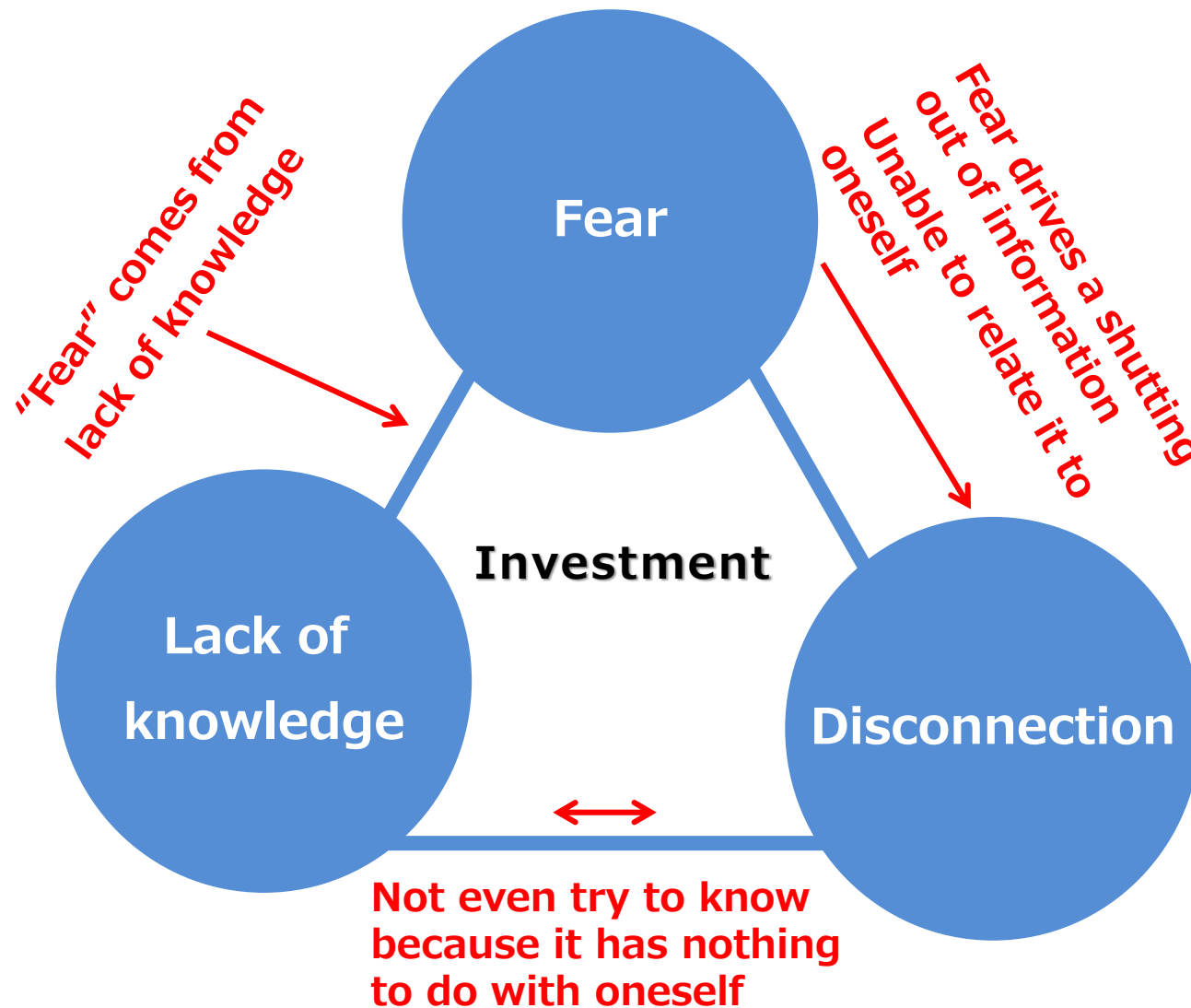


- ② **Online questionnaires** (verifying the processes and triggers identified in the interviews by targeting people who have never invested)



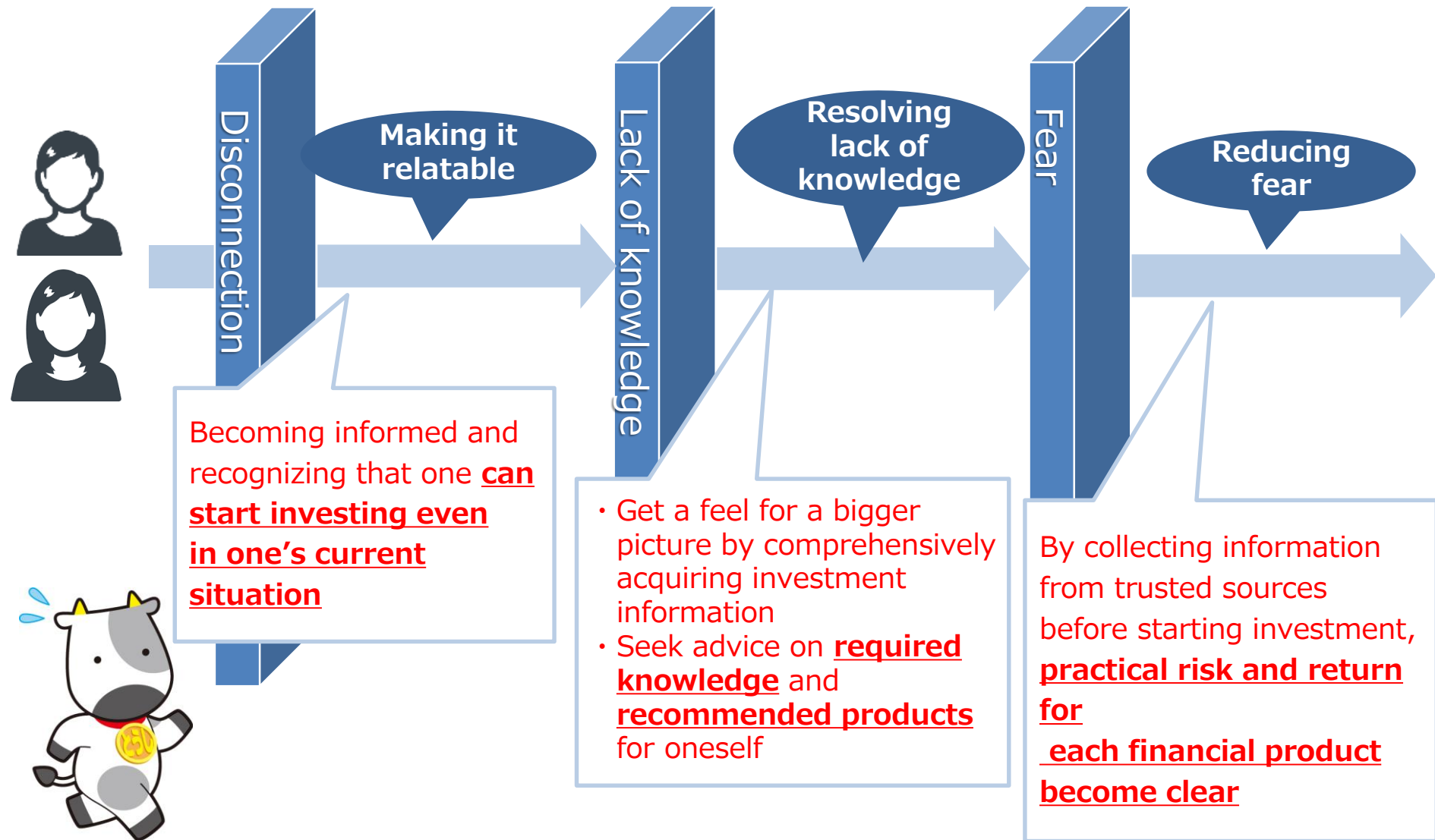
- ③ **Group interviewing** (based on the results of ① and ②, show samples of online content to people who have never invested and verify the results of change in awareness)

## (1) Three barriers in starting investment



## 4. Results of investment awareness survey

# (2) Key points in removing the barriers



## **Future measures by JSDA**



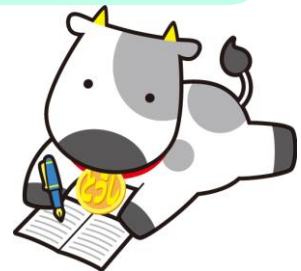
## 5. Future measures by JSDA

**Uninterested**  
in  
investment

**PR and Marketing, etc.**

**Interested**  
in  
investment

**Financial & securities education support**



### ① Establish access points to JSDA web content

Conduct marketing targeting keyword searches, such as “investment • beginners”, “income”, “expenses”, and post advertisements or articles in news media which cover topics related to money or lifestyle.

### ② Enhance web content

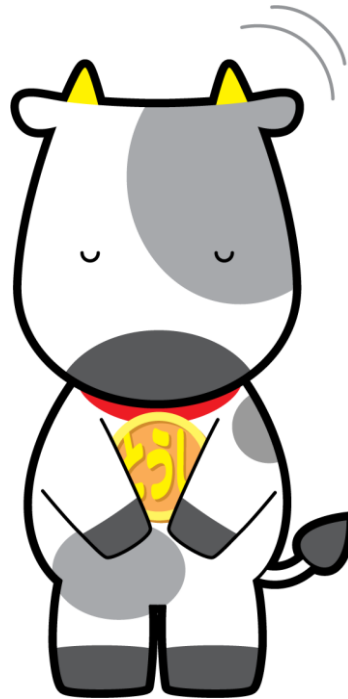
Enhance text content of pages and use pictures or videos to introduce concepts and facilitate understanding.

### ③ Redesign the website

Increase page views per visit and create a new section for the general public where users can easily view or search for information.



# Thank you for your attention !



## **Toushi-kun**

Mascot character for  
*Securities Knowledge Proliferation  
Project*