THE PERCEPTION OF AUSTRALIAN HOSTS

BY JAPANESE TOURISTS

Ivetta Langowoj

Minor thesis submitted for the degree of

Master in Tourism Development

Department of Hospitality and

Tourism Management

Faculty of Business

Victoria University of Technology

Footscray campus

1990

TABLE OF CONTENTS

Acknowledgements

There have been several people who have faciliated the task of writing this thesis considerably for me and whom I would like to mention here.

Firstly, I would like to thank my supervisor, Dr Robert Waryszak, for his help, quidance and assistance in writing this thesis.

I would particularly like to thank Mr Hiro Take, from Humanities Department at FIT, and his friends for their commitment in guiding me and offering practical advice on how to approach effectively Japanese tour companies remarkably sensitive to cultural nuances.
I also want to thank Mr Hiro Take for supplying me with the data on the Japanese tourist market.

I would like to thank Mrs Ritsuko Greenwood, manageress from Nitchigo Interpreter and Guiding Service in Melbourne for allowing me to distribute most of my questionnaires in her agency, her understanding of the importance of the study and her professional advice in the preparation of the questionnaire.

I would like to thank Mrs Toshiko Shimizu, manageress of Mel-Guide in Melbourne, for her help and for encouraging her staff to distribute the questionnaires.

I also would like to thank Mrs Setsuko Iguchi, the Inbound manageress of JCT in Melbourne, for her suggestions and for providing me with the opportunity to distribute some of the questionnaires in her agency.

I extend my thanks to Japanese tourists and students for their advice in the preparation of the questionnaires.

Especially I would like to thank my friend, Ales, for his continual support over the months of writing this thesis. His support has stimulated me to write this thesis.

I owe special thanks to Mr Ray Anderson for reviewing the draft of this thesis and for his constructive comments.

Melbourne, 1st August 1990   Ivetta Langowoj

Summary

An extensive literature in psychology of tourism and other
related disciplines indicates that previous studies oriented
toward tourist-host contact have concentrated on the effect of
tourists' presence on hosts' communities (economic, social,
environmental impacts). Only a few studies have been concerned
with the influence of hosts' communities on tourists,
particularly in shaping tourists' reactions to hosts'
communities and the destination visited. There is limited
scientific attempt to measure the influence of Australian hosts
on Japanese tourists (perception, satisfaction, dissatisfaction).
There does not seem to be an instrument for the assessment of
Japanese tourists' perception of their Australian hosts either.

The aim of this study was to clarify problems related to
Japanese tourists-Australian hosts contact with particular
reference to interpersonal relationships and to identify the
degree of satisfaction experienced by Japanese tourists with
Australian hosts and service provided.

In order to examine the perception Japanese tourists have of
Australian hosts and services provided and to indicate their
satisfaction from interacting with Australian hosts, pre- and
post-travel questionnaires were prepared and used to survey
Japanese tourists visiting Melbourne. Several criteria have been
taken into account when developing the questionnaire such as
reliability, validity, questionnaire had to be concise, items had
to be simple, precise, easily understood by respondents, easily
scored.

The findings from the present study differed partially to those of other studies which also attempted to measure Japanese tourists' perception and satisfaction with Australian hosts. The study results showed that Japanese tourists' post-travel perception of their Australian hosts and service was in many cases less favourable than their pre-travel perception. Service was assessed as average and level of Japanese satisfaction was assessed as moderate.

The implications of the findings are considered and their importance for the development of future research is reviewed.

Keywords: tourism, tourists perception, attitude, complaints, hospitality, satisfaction, service, quality, customer, Japanese tourists, Australian hosts, interpersonal relations, tourist-host contact.

List of Tables

List of Figures

Chapter 1

INTRODUCTION

1.1 Reasons for interest in Japanese tourists

During the last decade the importance of the Japanese market in developing Australia as a tourist destination has been emphasized for the following reasons:

- Japanese market seems to be the fastest growing in our industry
- Australia benefits from Japanese tourists
- Each Japanese tourist spends in Australia more than double the average outlay of any other tourist per day (Bureau of Tourism Research, 1989)
- Australia seems to have greater potential to attract a larger number of tourists from Japan than it is currently doing
- Australia does not seem to be prepared to deal with the expected influx of Japanese tourists depriving itself of millions of dollars
- The growth of Japanese tourists arrivals to Australia slowed dramatically in 1989
- Many Japanese holidaymakers complain that they have not been able to satisfy their expectations, not being impressed by Australian standards of product and service (McArthur, 1988 and Kennedy, 1988)

- By taking into account the socio-psychological factors
  Australia could be more fully aware of Japanese needs and
  expectations, would be able to respond to special requirements
  of Japanese tourists and attract more Japanese visitors.

For detailed elaboration on the reasons for interest in Japanese
tourists see Appendix A, p.112.

1.2 Problem

This study attempts to identify and analyze problems in the
area of satisfaction with service of Japanese tourists who might
be arriving to Australia in even greater numbers in the years to
come.

This is one of the first scientific Japanese satisfaction
studies regarding Australian hosts and service provided.

This study is an exploration of the questions: to which extent
Japanese tourists are satisfied or dissatisfied with Australian
hosts and service provided, what factors influence Japanese
tourists' satisfaction/dissatisfaction, what kind of relationship
between hosts and tourists is preferred by the Japanese in order
to reach this market most effectively and whether Australian
hosts are measuring up to Japanese tourists' expectations.

Most discussion about Japanese tourists' satisfaction with
Australian hosts and service provided is focused on aspects such
as hotels, food and drinking establishments, shops, Australian
tour guides and airports.

This study attests to the concept of the Japanese tourist market with particular reference to interpersonal contact between Japanese tourists and Australian hosts. This study attempts to answer:

1) What are the perceptions of Japanese tourists of their Australian hosts and service provided on arrival to Australia?

2) What are the perceptions of Japanese tourists of their Australian hosts and service provided on departure?

3) Were all the expectations met? If not why not?

4) What is the Japanese tourists' level of satisfaction?

5) What are the aspects relevant to the Japanese market that seem worthy of further research?

In undertaking this study it is assumed that:

1) On arrival to Australia Japanese tourists perceive the relationship with Australian hosts in which they expect a sense of affiliation with Australian community, friendliness, concern for their needs, awareness of their culture, etc. Japanese tourists also perceive service provided by Australian hosts as top quality, very professional and personal.

It is important to note that the Australian Tourist Commission study (1990) showed that Japanese tourists prior to their arrival to Australia have very high expectations that Australia would offer them a significant experience in terms of the friendliness and helpfulness of its people.

2) *On departure Japanese tourists perceive Australian hosts and service provided less favourably. Japanese are pushed away by lack of professional and competent service in Australia, by an inappropriate attitude to them, a lack of concern about their needs, and the inability of Australian hosts to communicate with Japanese tourists in their own language and be aware of cultural differences.*

3) *Australia does not meet all Japanese tourists' expectations. Australia has difficulties in providing the best possible service for Japanese tourists and in developing the best possible relationship with Japanese tourists. This creates disappointment on the part of Japanese tourists in delivering a unique experience which the market expects and has a negative impact on the way Japanese feel about Australian hosts and Australia as a tourist destination.*

These assumptions have been made in order to confirm scientifically the statements mentioned in daily newspapers.

The following terms have been defined for the purpose of this study:

<u>Foreign tourists</u> - people visiting country other than that in which they usually reside, for a period of at least 24 hours, for the purpose other than employment, permanent residency and education (McIntosh, Goeldner, 1986). In the Japanese language the word tourist means sightseeing guest.

Hosts - nationals of a destination country associating and taking care of tourists, example: hoteliers, front desk employees, waitresses, shop assistants, custom officials, tour guides, taxi drivers, bus drivers,etc.

Expectations - anticipations, beliefs about the object and feelings it can cause in the future.

Perceptions - feelings, impressions, individuals thoughts, imaginations about particular object; include knowledge and beliefs about the object, memories; depend on internal factors (age, sex, education, qualifications, personality, previous travel experience,etc.) and information presented by external factors (commercial environment: business, companies; social environment: friends, relatives, reference groups; culture); predispose the individual to act in a predictable manner; influence the likelihood of buying services/product; can be changed over time.

For the purpose of this study the definitions of expectations and pre-travel perceptions were used interchangeably for ease of reading.

Satisfaction - positive feelings, reactions to the object, contentment obtained from fulfilling needs and wants considered important; can create desire and intentions for repeat purchase of product or service and repeat visit; depends on amount of benefits individual can get from the comfort of fulfilling needs and wants; can cause feelings of happiness, peace of mind,etc.

In the following chapter an attempt will be made to clarify some of the above outlined definitions and to review existing literature on various aspects of these definitional concepts and their relationship to the investigative study.

Chapter 2

LITERATURE REVIEW

In order to identify previous research in the area of study a computerised literature search through Dialog Information Services on Commonwealth Agricultural Bureau (CAB) Abstracts using Leisure, Recreation and Tourism.Abstracts 1984-1989 was performed. The literature search commenced in 1984 because it was the first year when the first data on leisure, recreation and tourism has been included in the Dialog Information Services. The search found no evidence of previous studies which measured Japanese tourists' perceptions of Australian hosts. Further investigation was carried to review the following journals: Annals of Tourism Research, Evaluation Review, International Journal of Intercultural Behaviour, Journal of Leisure Research, Journal of Social Psychology, Journal of Travel Research, Psychological Review and Tourism Management.

It was found that few writers had investigated the human side of tourists. There has been some research on hosts and guests intercultural contact. There has been a tendency to concentrate on either the hosts or the guests side. Most research papers were concerned with the tourists' impact on the hosts and hosts' reactions to tourists. There is a drawback in the research papers emphasizing the hosts' impact on tourists and tourists' reactions to hosts as the psychological effect of tourist-host intercultural contact from the perspective of the tourist has been ignored.

This literature review will start with broad theoretical writings and culminate with specific findings and anecdotal information relevant to the present study.

Most researchers write about tourism in relationship to other disciplines such as economics, finance, regional development, and so on, seeing tourism from the point of view of supply and demand and make input-output analysis for tourist regions. Most researchers are concerned with this aspect of tourism and analyse tourism in such terms as prices, arrivals, departures, expenditure, employment, foreign exchange earnings,etc. (Przeclawski, 1986). They treat tourism as a business activity and profit from tourism as one of the most important factors influencing all activities in tourism industry (Przeclawski, 1986). Researchers concentrate more on selling a product and making profit rather than satisfying tourists' needs in the first instance. Relying mostly on economic and statistical data and making all activities dependent on profit is probably the greatest misconception about tourism.

Tourism is not just an economic activity. Tourism is also a human activity. "Tourism is an important feature of man's life. It is the way man carries out various values. It is not only a form of leisure but it may also be a way of reaching various aims" (Przeclawski, 1986, p.17). We can not understand tourists without being aware of their needs. Tourism gives an opportunity to fulfil the intellectual needs, learn about the world, discover other cultures, and interact with other people. These experiences can be more valuable than material values, although, not as easily measured in financial terms. "The bottom line in the

tourist industry is not the dollar; it is the experience of the people who pay for their holidays" (Pearce, 1988, p.21).

In order to sell the product and service to potential tourists at their destinations it is essential to understand needs and values that tourists wish to satisfy when considering holidays. "If we do not understand the consumers' needs, motivations and satisfactions, then we cannot expect continued payment for the tourism product" (Pearce, 1988, p.21). If we are aware of the needs tourists are attempting to satisfy, we can provide a better service to them and we can increase their holiday satisfaction. We can assume that the various needs and wants considered important by tourists will be satisfied if tourists perceive that these needs and wants will be satisfied at the holiday destination. According to Mill and Morrison (1985) tourists take vacations because they perceive that needs important to them will be satisfied. The satisfaction of tourists' needs depends on:
a) tourists' expectations that destination will satisfy needs and
b) whether or not destination has previously satisfied tourists. What tourists expect and whether their needs are satisfied depends on various demographic, sociographic and cultural factors including age, sex, education, social class, nationality, culture, values, beliefs and information from external environment. To understand tourists' perceptions and to predict how tourists will evaluate certain destinations and if they will come back to those destinations, it is necessary to get to know the tourists and the environment which influences tourists' decisions. Lack of understanding of tourists' cultural background and their psychological make-up has great impact on their

unfulfilled expectations and dissatisfaction.

The above mentioned factors indicate the criteria important to determine which tourist destination is most likely to satisfy tourists' needs, how they will perceive that destination, whether or not a destination will satisfy them and whether or not tourists will return again to that destination. If tourists perceive that a destination satisfies their needs they will be inclined to come back to that destination.

Tourists' satisfaction with a particular destination depends on tourists' expectations about that destination. "If the level of expectations is higher than actual experience, the individual will be dissatisfied. For an individual to be satisfied with a product, service, or situation, the level of actual experience must be equal to or greater than the level of expectation" (Mill and Morrison, 1985, p.10). "The more an individual is pleased with a vacation choice, the fewer will be the other alternatives considered. This places great importance on the level of service to assure a quality experience and a level of satisfaction that will bring the traveler back" (Mill and Morrison, 1985, p.10).

According to Pearce (1988) expectations alone are not enough to understand tourists' behaviour and need to be linked to a theory of motivation. If the tourist was not motivated, there is no guarantee of satisfaction. "While tourists initially enjoy physiological type experiences, more experienced travellers may use travel for the development of relationships, self-esteem purposes and even self-actualisation motives" (Pearce, 1988, p.28).

During their trips tourists become familiar not only with the new cultures of visited destinations but they become familiar with the people in the place they visit and develop relationships with them. Tourists get involved in social contacts with not only local people but also with the organisers of trips, tour guides, hotel staff, airport staff, waiting staff, shop attendants,etc. and they depend on the contacts with them. Tourists' satisfaction also depends on expectations and perceptions developed through such contacts.

We should not think about tourism only in economic terms but also in terms of human beings and their behaviour. Tourists experience trips intellectually and emotionally. Natural and man-made tourist attractions and tourist facilities are only one part of tourists' holidays. Satisfaction with holidays also depends on tourists' thoughts and feelings about particular holidays. Economic studies of tourism fail to emphasize tourists' feelings. According to Pearce (1988) good holidays depend on how tourists feel inside. Hosts are part of tourists holidays. Hosts can please tourists and make them feel welcome so tourists may return. Hosts can also make tourists feel unhappy, dissatisfied, and disappointed, for example: by their indifferent attitude to them and this may deter tourists from coming back to a particular destination.

The perception tourists have of their hosts may determine whether or not any positive relationship between them will develop, affect repeat visits and acceptance of the area as a tourist destination. What the potential tourists think about the people of the destination and services provided by these people

may influence the success of a particular business and area in tourism development. According to Hunt (1975) the perceptions of people of a visited region by tourists may influence upon the viability of the area as a tourist region. According to Pearce (1980) tourists' evaluation of the region visited depends on their degree of liking or disliking of the people encountered while on holidays. Positive perception of hosts influence the choice of travel destination and affect tourist satisfaction (see Figure 1: "Six Routes to Visitor Satisfaction", p.13). Negative perception when expectations are higher than experience influence tourist dissatisfaction (Mill and Morrison, 1985) and lead to criticism. "Dissatisfied tourists will go elsewhere, and they will advertise their negative experiences very efficiently" (Pearce, 1988, p.21).

Without examining the changes in tourists' perceptions, influence of hosts on the tourists' satisfaction and psychological approach to tourist-host contact, people involved in tourism industry will never be able to respond properly to tourists' holiday needs and quarantee tourists' satisfaction and return visits. Pearce (1988) stated that psychological studies must "be employed to understand the motives and thought processes of travellers" (p.22). By taking into account tourists' motivation governing the choice of tourist destination tourists' behaviour can be predicted (Pearce and Caltabiano, 1983). The positive and negative tourists' perceptions depend on different motivation needs. So "an understanding of the modern day Ulysses, whether he be a self-discovery adventurer or package tourist" is necessary (Pearce, 1988, p.22). "The proper study of tourists is,

Figure 1: Six Routes to Visitor Satisfaction (Dissatisfaction)

1. Visitor expectation high + visitor experience good → Outcome Predictable (strong) — link to — Visitor Satisfaction → Would return / Would recommend / Favourable comments

2. Visitor expectation low + visitor experience good → Outcome Predictable → Internal attribution (responsibility to self) (weak)

3. Visitor expectation low + visitor experience good → Outcome Unpredictable → External attribution to environment mode (strong)

4. Visitor expectation high + visitor experience poor → Outcome Unpredictable → Internal attribution (weak)

5. Visitor expectation high + visitor experience poor → Outcome Unpredictable → External attribution → Visitor Dissatisfaction → Would not return / Would not recommend / Negative comments / Possible damage to setting

6. Visitor expectation low + visitor experience poor → Outcome Predictable

Source: Pearce, P.L., The Ulysses Factor – Evaluating Visitors in Tourist Settings", Springer-Verlag, New York Inc., 1988, p.86

at first, a psychological one" (Pearce, 1988, p.22). Statistical and economic data lacks an understanding of basic psychological factors affecting tourists' motivations, needs and behaviour (Pearce, 1988).

There is a need to identify tourists' perceptions, particularly to identify problems which create negative perceptions. Successfully changing negative perceptions will result in destination being more desirable for tourists. Because perceptions depend mostly on social and cultural factors influencing tourists we have to undertake specific research for each travel market. Only recently some researchers have begun to explore tourists' perceptions of their hosts and this will be reviewed later in this chapter.

A literature review shows that a good deal has been written on Japanese tourists (Moeran and Graburn 1983; Leiper 1985, 1987; Howell 1986; Warner 1986; Watson 1986; Kennedy 1988; Lethlean 1988; Maurer 1988; McArthur 1988; McGee 1988, McGown, Todhunter, Chalmers, Platt 1988; Morris 1988, Polunin 1989, ATC 1990). However, much of the information was anecdotal and usually only mentioned in daily newspapers. Furthermore, much of what is available in English lacked any in depth analysis. There appeared to be no scientific effort to find out about Japanese tourists perceptions of their Australian hosts. There seems to be no psychological approach to Japanese tourists-Australian hosts contact. It seems that no one before has tested the Japanese tourists' perceptions of Australian hosts on arrival and departure either. Japanese tourists have not been thoroughly scrutinized. They have only been considered as different kind of

human beings by their hosts. This is the reason why their needs are "still understood only partially by the tourism industry whose record in providing what Japanese want has been patchy" (McArthur, 1988, p.1).

This study looks at Japanese tourists-Australian hosts relationships. The Japanese market is important to Australia for economic and other reasons and Australia should increase its share of tourists from Japan. Whether or not Australia will increase its market share of Japanese tourists will depend on the impression it creates on Japanese tourists in the nearest future and whether it gives them satisfaction.

The growth in the share of inbound Japanese tourists is related to their satisfaction which is not only influenced by their perceptions of their destination and product (standard of accomodation, facilities, attractions,etc.) The quality of service provided by hosts and human relations between Japanese tourists and Australian hosts, the way Japanese tourists are treated by Australian hosts in the delivery of the tourist product is critical.

According to Pearce (1982) the social interaction between tourists-hosts is very important. Pearce (1982) illustrated the role of many people associated with the travel industry such as hoteliers, restaurateurs, custom officials, salesmen and others in contributing to the overall impression the tourists gain of the visited hosts. He indicated aspects of positive and negative incidents involving tourist-host contact. He indicated many variables perceived negatively by tourists (impoliteness, inappropriate hosts behaviour, annoyance by not being able to

achieve certain standard of service, feelings of discontent, frustration,etc.).

The role of hosts and their impact on tourists' satisfaction has been also demonstrated by Stringer (1981). He showed difficulties in host-guest interaction in hotel establishments and found that it is not easy to satisfy guests' requirements because of poor relationship between hosts and guests based on the very commercial attitudes of hosts toward guests. Stringer emphasized the importance of the authentic interpersonal experience between hosts and guests and psychological comfort in satisfying guests' needs. Argyle (1975) stated that tourists can escape from difficult and uncomfortable contact with hosts through the help of tourist guides. A view supported by Taft (1977) suggested that tourists guides can insulate many travellers from many of their difficulties. Schmidt (1979) emphasized the role of a good guide in providing authentic experience for the tourists and asserted that a poor guide can ruin travel experience. Furthermore, he argued that guided tours have become popular because they remove many of the tourists' interaction difficulties. Holloway (1981) suggested that not only the information giving role is very important but the tour guides skills also include being culture broker, a mediator between hosts and tourists, stimulating interrelation between hosts and tourists on personal level, being able to make relationship between hosts and tourists more meaningful, are critical for total tourist experience. According to Sutton (1967) if both parties are tolerant and the host competent in providing services the tourist-host contact may achieve positive results. When

suspicion and mistrust develop from cultural misunderstanding the tourist-host contact may achieve negative results. Tajfel and Dawson (1966) found that the foreign tourists may also experience racial discrimination while being on holiday in another country.

According to Sutton (1967) and Taft (1977) the interaction difficulties can be produced by cultural differences, they may produce tourist-host friction (eg.: opportunity for exploitation) and shape negative tourists' to hosts reactions as well as negative hosts' to tourists reactions. According to Pearce (1982) the cultural differences raise many positive and negative feelings toward hosts.

Furnham (1984) indicated the impact of cross-national differences in social skills on tourists' communication difficulties. Morsbach (1973) stated that differences in non-verbal behaviour like gestures and manners may have significant impact on tourist-host contact. Knowledge about the meaning of symbolic gestures would be useful to many hosts for better mutual understanding and making interaction closer and more informative. According to Neustupny (1987) the awareness of the verbal and non-verbal differences in communicating with the Japanese helps to understand their problems and interact with them. The same author described the meanings of many Japanese gestures, facial expressions,etc. which knowledge could help to avoid difficulties in communicating with the Japanese. Neustupny (1987) prescribed rules for communicating correctly with Japanese. However, he stated that in order to achieve proper interaction with the Japanese we must first know who the Japanese are in relation to tradition, basic features of Japanese life,etc.

In order to ascertain that many tourists form perceptions of the destination they visit and to see how these perceptions can change over time a comparison of pre-travel and post-travel perceptions was proposed. Shipka (1978) surveyed European tourists about their attitudes to holidays in America before and after travel. Steinkalk and Taft (1979) investigated Australian students' attitudes to holidays in Israel. According to Shipka (1978) Americans were perceived as friendlier than imagined. According to Steinkalk and Taft (1979) students' post-travel assessment of kibbutz life was more favourable than their pre-travel perception. The pre- and post-travel questionnaires enabled the researchers to claim that tourists' attitudes to their holidays changed due to the travel experience as their post-travel perceptions differed from pre-travel perceptions. In 1980 Pearce aimed at assessing British tourists' post-travel attitude changes to the visited Greeks and Moroccans. He compared tourists' responses one week before the overseas holiday, and one week after the tourists had return to Britain. Pearce (1980) found out that tourists' attitudes to the visited hosts changed after their holiday finished. Tourists saw the Moroccans as greedier, more mercenary and more talkative than prior to their holiday. Greeks were seen as more demonstrative and less sophisticated than before. Pearce (1980) also tried to answer the question whether there are any links between tourists' satisfaction and their perceptions prior and after visiting destination. He demonstrated factors affecting the evaluation of the people encountered on holiday suggesting that "tourist post-travel evaluation of the hosts depends on the tourist pre-travel

favourability toward visited nationality and the tourist post-travel holiday satisfaction ratings" (Pearce, 1980, p.13). He indicated that "when the pre-travel favourability is initially high, tourists will be mentally prepared or set to evaluate visited people positively" (Pearce, 1980, p.14). However, he stated that "initial favourability toward a country or its people is not a quarantee of a satisfying holiday there" (Pearce, 1980, p.14). Although favourability has impact on a post-travel evaluation, satisfaction has the more powerful influence on post-travel evaluation scores. "Tourists' post-travel evaluations of the local people can be predicted adequately from their post-travel satisfaction scores and the initial favourability of their attitude" (Pearce, 1980, p.14). Satisfaction is the major contributor to the post-holiday image. But it also has to be remembered that the personality, information available to tourists, external factors like weather, travel companionship, fulfilling of the tourists' motives for travelling also influence tourists' satisfaction and evaluation. Pearce (1980) also stated that "holidays which leave tourists a little unsatisfied, that is with unfulfilled motives and plans, engender higher post-travel evaluations and more return visits than holidays with the highest satisfaction scores" (p.16).

Customers' satisfaction has been also evaluated by Lewis (1983). He considered the impact of complaints on customers' dissatisfaction. He referred to the ratio of compliments to complaints and applied this ratio to service and personnel in hotels. Lewis (1983) stated that dissatisfaction results from unconfirmed expectations. Customers' compliments seldomly occur

and only when the reality matches expectations. He indicated the importance of various factors (way complaint was handled by hosts, attitude of hotel staff,etc.) in tourist decision to return or not to return.

Francken and Van Raaij (1981) said that tourists' dissatisfaction depends on inequity, for example: when tourist does not get value for money. Tourists who attribute their dissatisfaction to external factors (travel agency, hotel, transportation company, tour guide) can be more dissatisfied than tourists who attribute their dissatisfaction to themselves.

Whether or not tourists will return to an establishment or recommend it to other tourists should be of concern to researchers. Services provided by hosts should be evaluated in order to determine what will bring return business and what will discourage such return visits (Pizam, 1978). Measuring and monitoring the public satisfaction can provide invaluable information for the tourism professionals (Maddox, 1985). All levels of the tourism industry should be vitally concerned with the degree of public satisfaction (Maddox, 1985). A dissatisfied guest complains widely and the consequences of customer dissatisfaction can be unpleasant. If the problems encountered by tourists could be detected early, remedial action could be initiated before a crisis occurs (Maddox, 1985). Examining tourists' reactions and their needs should be continuously monitored to assist in determining managerial and developmental decisions regarding tourism (Pearce, 1988). Pearce and Moscardo (1984) stated that social scientists can contribute to an understanding of tourists' behaviour and their experiences and

tourist evaluation could be a very important element in the management of tourist enterprises. Research embracing psychological profiles of visitors may reduce social and environmental costs of the current tourist developments and assist economic goals (Pearce, 1988).

The literature review reveals that there have been some attempts to measure the tourists' reactions to their hosts, however, mostly Pearce (eg.:1980,1982) explored tourist-host contact. He studied the attitudes of the tourists and kinds of difficulties the tourists encountered in dealing with hosts. Pearce's past studies showed that tourists had more positive attitude to their hosts due to tourists' travelling experiences.

The literature review also shows that there does not appear to be a scientific study similar to the aims and objectives of the present study. Since 1987 more writers begun to explore Japanese attitudes in the tourist-host contact and to describe Japanese perceptions of Australia and Australian hosts. However, most of the published information is anecdotal. There does not seem to be an attempt to measure the Japanese tourists' pre-and post-travel perceptions of their Australian hosts and Japanese tourists' level of (dis)satisfaction with Australian hosts and service.

The literature review outlined below is anecdotal and it has been published in daily newspapers.

McArthur (1988) stated that thousands of Japanese tourists, particularly honeymoon couples, go home every year not satisfied and not very impressed by Australian service. This anecdotal information supports this study's assumption that the Japanese

tourists' perception of the Australian hosts and service provided is not always positive. McArthur (1988) stated that Japanese complain about lack of sophisticated packaging, lack of professional service at restaurants, they are dissapointed with the language and communication problem, with poor organisation of tours and lack of Australian home-made products. McArthur's (1988) statements prompted this researcher's search for the authentic Japanese tourists' perceptions of the service provided by the Australian hosts. The researcher's aim was to investigate scientifically if the problems mentioned by McArthur were really perceived by the Japanese tourists holidaying in Australia. The areas of investigation were hotels, restaurants, shops, Australian tour guides and airports. The researcher looked at the Japanese tourist-Australian host contact from the human relations point of view.

According to Kennedy (1988) "Japanese come to Australia and find hotel receptionists and waitresses are just too rude and lazy. Service staff often play games with tourists because of their poor command of English rather than making an effort to break through the language barrier" (p.1). In Japan a guest is greated at the check-desk with a deep bow and the word "welcome". Japanese complain about bad mannered hotel staff. Japanese found Australians lazy. They found service varied between "all right" and "so so" (Kennedy, 1988). Kennedy's statements provided a base for the development of the questionnaire items used in this study.

McGee (1988a) stated that the Australian tourism industry is not doing everything well giving many examples of the Japanese

tourists' dissatisfaction, for instance slow service.

Ostrow (1988) indicated that Japanese found it difficult to accept the Australians pattern of weekend penalty hours, having only four hours to shop in stores where service is slow and packaging and presentation is unprofessional and old fashioned. Harrington (1988) mentioned that Japanese while polite and uncomplaining, are particular tourists who expect the best from their hosts. Their response to poor service would not be a complaint, but refusal to return to Australia. Harrington was concerned that Japanese went home to Japan with up to one third of the money they intended to spend because shops were closed when they wanted to buy, or because they could not find the souvenirs they wanted.

Maurer (1988) emphasized that the Japanese are very conscious of the regard in which they are held. This includes the Australians with whom they come into contact while on holiday. If their experience is negative, they will spread that message. The racist and xenophobic outlook on the Gold Coast can only harm Australians chances for becoming one of the most desirable tourist destinations for Japanese and can have devastating effects on tourism and ultimately, the economy.

Howard (1988) stated that a perception that the Japanese were not welcome could taint relations between Australia and Japan and stem the investment tide in the hotels and tourism sector, particularly Queensland resorts. Howard's comments followed increasing anti-Japanese feelings on the Gold Coast.

Ostrow (1988) expressed the view that most Australians think the Japanese to be inscrutable and difficult to comprehend. "It must

also be understood that the Japanese are highly emotional and idiosyncratic" (Ostrow, 1988, p.10). They have an anxiety about cleanliness, are fanatical about such things like losing face, embarrassement, insult, and get very upset if they are forced to wait. Japanese do not complain in Australia. They go home, then complain, and it is too late. They are not satisfied with service in Australia. Ostrow also said that Australians are lazy. They do not know how to access a whole range of fairly complex services. Australians have a lot to learn about what makes Japanese feel comfortable. Ostrow stressed that those who have taken the time to understand Japanese ritual, likes and dislikes, prosper. The task of building up trusting relationship with Japanese is beneficial. Those who will benefit in the future are those who learn the needs and desires of this very complex people. According to Ostrow (1988) tour operators, restaurateurs, hoteliers and those who understand the Japanese psychological make-up, ideologies and the importance of such things as loss of face and other innumerable delicacies, are coming into the Japanese market quickly. Success comes in understanding the Japanese mentality.

Neustupny (1987) indicated strongly that there is a need in the tourism industry for personnel who can communicate effectively with our guests from Japan. However, it is impossible to design a proper course for the tourism industry without a rigorous survey of the problems Japanese tourists face in Australia.

McGown, et al., (1988) identified some problems involved in Australian hosts-Japanese tourists contact. They described Japanese tourists' expectations and perceptions of Australia in

relation to quality, value, service, accomodation, eating establishments, tour companies, sightseeing, attractions. McGee (1988a) stated that the Japanese tourists to Australia regarded communication with local residents as significant when they assessed their travel experiences.

The most recent and most relevant research on the Japanese tourist market was conducted by Australian Tourist Commission in 1988-1989. The primary purpose of this study was to examine the level of satisfaction or dissatisfaction amongst Japanese holiday visitors to Australia. The ATC claims that its study is the first research project that examines the reasons Japanese visit Australia and the extent to which they are happy or unhappy with Australia as a holiday destination. It explodes a large collection of myths that has developed around Japanese tourists during the 1980s.

The ATC research shows that Australia's hospitality service is not as bad as critics would have us believe. The results challenged many of the negative assumptions that have been made in the daily media about the servicing of the Japanese tourist market. The study showed that Japanese had very high expectations and that not only does Australia meet these expectations -in many instances it surpasses them.

According to ATC (1990) Japanese tourists arrive to Australia with only moderate or even low expectations of service standards and return home with much more positive beliefs regarding service and tourist facilities than they held to arrival. The myth that service standards in the Australian tourism industry are lower

than Japanese tourists expect and Japanese tourists complain about poor service, poor food, accommodation and poor shopping facilities has been created by the media. According to ATC Australian service standards were rated by Japanese tourists extremely highly. 90% of surveyed Japanese said Australians friendliness, politeness, sincerity and helpfulness exceed all expectations. Results were very positive regarding accommodation services (friendliness of staff), restaurant services and Australian customs and immigration staff. 82% of Japanese tourists were impressed by tour guides. 98% of Japanese said that their level of enjoyment (holiday satisfaction) exceed all expectations. 95% said they would intend to come back.

The ATC study (1990) also showed that the satisfaction level with the amount of information available for Japanese tourists while in Australia was relatively low. The Japanese tourists would prefer to be served by Australian born hosts speaking Japanese language in order to experience the Australian culture. Most of the Japanese tourists wanted to interact with Australians while on holiday in our country. According to the ATC background paper on the Japanese satisfaction study (1989) Japanese tourists enjoyed dealing with Australians, even if Australians did not speak the Japanese language.

It should be noted that the ATC study was completed in September 1989, just prior to the start of the Australian pilots' strike. The questionnaires had been handed to Japanese tourists in Brisbane, Melbourne, Cairns and Sydney airports as tourists left Australia. Japanese tourists' perceptions of service and satisfaction level was evaluated on the basis of post-travel

questionnaire and 600 questionnaires were filled in.

The importance of the ATC study (1990) lies in focusing on the market which is the main source of international tourists to Australia and presenting the reasons Japanese tourists visit Australia. The ATC study was the first research project in Australia that analysed Japanese tourists' attitudes, product preferences, travel intentions and examined the extent to which Japanese tourists are happy or unhappy with Australia as a holiday destination. ATC was the first that had asked Japanese tourists what they expected or wanted and it contradicted the many negative assumptions that have been developed around Japanese tourists during the last few years. Until the ATC study findings, there was little research of this scope and detailed information on Japanese tourist market available for the Australian tourism industry. The ATC study was one of the most innovative in its approach to the Japanese market research.

The ATC study is of great value for the marketers promoting Australia in Japan. The ATC study shows what kind of tourist product is preferred in the market and what areas of service can be promoted most effectively to the Japanese market.

The important element of the ATC study is the presentation of the strength of the "people factor" as one of the motives for Japanese tourists coming to Australia. "People factor" involves hosts with whom tourists come into direct contact while holidaying in our country, their abilities to serve the customers and develop positive tourist-host relationship that makes tourists feel happy and welcome. The idea to measure Japanese tourists' satisfaction with hosts and service experienced in

Australia was initiated by the ATC research program and its findings which showed that the "people factor" and the issue of satisfaction with service was of great significance to Japanese tourists holiday satisfaction. At this point the importance and relevance of the ATC study to this study has to be acknowledged.

Although the ATC's study showed that service provided by Australian hosts to Japanese tourists is good, the anecdotal information revealed that there are many problems encountered by the tourism and hospitality industries in providing services to the Japanese market. Japanese return home unsatisfied. They do not complain while on holiday, they keep all complaints for the tour organiser in Japan and this can mislead Australian service providers "into believing that their service is fine and to being unappreciative of client expectations" (Polunin, 1989, p.7). Further analysis and clarifications of the problems specifically related to Japanese tourists-Australian hosts contact and service provided was desirable.

The literature review reveals that there were some theoretical and practical attempts to look at the problems related to tourist-host contact. Human side of tourists and tourists' reactions to hosts were studied. Changes in tourists' perceptions, criteria of tourists' satisfaction with their holidays, including the importance of the social contacts between tourists and hosts on tourists' satisfaction, were emphasized. The role of hosts and their impact on tourists' satisfaction was demonstrated.

The literature review also showed that there were come current attempts to look at Japanese tourists-Australian hosts relationship and determine criteria of Japanese tourists' satisfaction with Australian holidays. The role of Australian hosts and their impact on Japanese tourists' satisfaction was studied. There were also anecdotal information in daily newspapers about Japanese tourists and their perceptions about holdaying in Australia. However, there were discrepancies in opinions about potential problems in satisfying Japanese needs. It seems that one of the reasons for such discrepancies could be a lack of a proper technique for measuring Japanese tourists' perceptions and satisfaction, together with failure to perform an in depth analysis of the evidence. In the past, Japanese tourists' perceptions of Australian hosts and service provided were not tested on tourists arrival to Australia and departure from Australia. Data obtained from the previous studies may therefore not be reliable. Much of the information was anecdotal. Further data verification was needed. Identification of problems which create negative perceptions was required.

Because no detailed research on Japanese tourists' satisfaction with Australian hosts was conducted before, the analysis of the degree of Japanese satisfaction with Australian hosts and service provided required separate scientific study. What do Japanese tourists perceive as the most important values as they relate to service in tourism and hospitality industries? What appeals to their emotions? What gives them their satisfaction when holidaying in Australia? These are but a few questions which had to be answered in the present study.

The importance of the past studies lies in their contribution and creation of the main base for the present study research. The past studies have made a major commitment to the present study research, gave the basic ideas and indicated the present research directions. The past studies uncovered some problems in relation to tourist-host contact with specific reference to Japanese tourists and created opportunity to look at the narrow aspects of this contact.

The ATC Japanese holiday satisfaction study was the largest and most detailed Australian tourism research project ever undertaken. However, the present study attempted to give greater depth of insight into Japanese tourists' satisfaction level specifically in relation to Australian hosts and service provided. This study is in the way a continuation of the ATC study. It should also be followed by further similar surveys of American, British, European and Asian tourists. Although the ATC set up a strategic research program that calls for big market segmentation studies in each of the ATC's key overseas markets and evaluation of the tourists' satisfaction level, there would be also a need to conduct further separate studies specific to each tourist market only in relation to tourists' satisfaction with Australian hosts and service provided.

In the following chapter an attempt will be made to outline the method used to collect information about specific aspects of the Japanese tourists' needs and expectations in relation to Australian hosts and service provided and to test assumptions stated in Chapter 1 related to this study.

Chapter 3

METHODOLOGY

3.1 Instrument

This study required the development of an instrument which could measure Japanese tourists' perceptions of Australian hosts and service provided in relation to interpersonal tourist-host contact and should be a) concise enough to avoid reluctance from tourists, tour guides and tour operators, b) economical in terms of cost, time and effort, c) easily understood by respondents, d) easily scored and interpreted, e) acceptable for researchers interested in the effects of results. The instrument should also give an indication of the Japanese tourists' level of satisfaction from interacting with Australian hosts and service provided.

3.1.1 Development of the Instrument

A questionnaire was developed and revised using comments and criticism from three Japanese tour operators as well as from ten Japanese tourists-students. The Japanese tour operators were asked to indicate how they feel their Japanese clients will perceive selected questions and what problems Japanese tourists might encounter when reading the questions. The revised questionnaire was translated into Japanese language.

The questionnaire consisted of two parts. Pre-travel questionnaire contained questions regarding Japanese tourists' perceptions of Australian hosts in terms of service provided on arrival (see Appendix B, p.133). Post-travel questionnaire contained questions regarding tourists' perceptions of Australian hosts and service provided on departure (see Appendix B, p.138). The questions on both questionnaires concerned Japanese tourists' pre- and post-travel perceptions of Australian hosts in terms of service provided in hotel, food establishments, at shops, in airports and by Australian tour guides. The questions on both questionnaires were the same to permit further comparison analysis.

Although the main body of both questionnaires was identical, the pre-travel questionnaire contained additional questions regarding demographic characteristics of the Japanese tourists. The respondents were also encouraged to make some comments on Australian hosts-Japanese tourists interpersonal contact and to make some suggestions or proposals about changes which could be made to increase future Japanese tourists' satisfaction from the interaction with Australian hosts and service provided.

It took ten minutes to complete the questionnaire. In order to match each set of responses (pre- and post-travel responses) respondents were asked to supply their first name or any other name on the last page of each questionnaire. The introductory letter for Japanese tourists explaining the purpose of the survey was developed and is contained in Appendix B, p.132.

3.1.2 Sources and Content of Items

In designing and preparing the questionnaire certain criteria have been taken into account.

The items contained in the survey were adapted from sample indicators of service quality (Martin, 1986), information from Consulate General of Japan on Japanese etiquette and anecdotal reports on the Japanese tourists' reactions to Australian hosts and service provided (Kennedy, 1988; McArthur, 1988).

Particular items have been included in the questionnaire because they reflect the Japanese conventional rules of behaviour relating to service and refer to the Japanese rules of etiquette concerning how to please and comfort guests. These items seem to imply Japanese expectations from hosts in relation to service. They are relevant to the purpose of this study and are useful for the purpose of data analysis. They can measure Japanese tourists' perceptions of Australian hosts and service, and provide further analysis and clarify problems related to Japanese tourists-Australian hosts contact.

The items had to be simple and precise to be understood by the majority of respondents and applicable to the majority of respondents and all market segments. The last criteria limited the number of items. Many relevant items could not be included in the questionnaire because they were not applicable to the majority of respondents, for example: many items relevant to the "honeymooners" market segment could not be included in the questionnaire because they were not relevant to the "silver market". Also many items which could be wrongly translated, for

example: double meaning, and could create confusion in responses were not included.

Other criteria that must be satisfied in preparing a questionnaire are those of validity and reliability.

The concept of validity refers to the ability of the instrument to measure what the particular instrument intends to measure. Validity is crucial for the development of an instrument and it depends on the purpose the instrument serves.
In the case of this study, the items included in both questionnaires did not measure what the instrument intended to measure (for the explanation see chapter 6, p.98,99). No validity of the questionnaire was established. The problems associated with the assessment of the validity of the instrument will be discussed later in this thesis.

The concept of reliability refers to the degree to which the instrument shows consistent results when applied repeatedly.
In the case of this study, it is questionable if the questionnaire items contributed to adequate and reliable responses. The probability of obtaining similar results when the same questionnaire is applied repeatedly is still to be ascertained. No reliability of the questionnaire was established. The problems associated with the assessment of the reliability of the instrument will be discussed later.

It has to be stated that, although further psychometric analysis has to be performed according to the questionnaire's specific area, it will be the aim of another study to establish the questionnaires' psychometric properties, as this requires more extensive research which is beyond the scope of this study.

3.1.3 Scoring Method

In order to examine the perception respondents may have of a particular item they were asked to consider the extent to which they experienced each item in question. The items not only attempted to determine some of the respondents' perceptions and opinions about Australian hosts and service provided but also to what extent these perceptions and opinions were important to respondents. Most of the answers were rated on a 5-point scale: a value of 5 was assigned to a response rated very high, for example very helpful, value 1 was assigned to a response rated very low, for example very unhelpful. The 5-point scale allowed for measurement at the interval scale and for appropriate statistical analysis.

3.2 Subjects

The selection of subjects was made due to availability of the respondents in Melbourne at the time of conducting the survey, willingness of the Japanese tour companies' management to give permission to use their clients and carry out this study, willingness of Japanese tour guides to distribute questionnaires, and co-operation on the part of the respondents.

Out of 150 (100%), 93 (62%) Japanese tourists answered the questionnaires twice on arrival and on departure between September and December 1989. For sociodemographic characteristics of the sample see Table 1, p.36.

Table 1

Sociodemographic Characteristics of the Sample

==

N=93	N	%

Age

18-24 years	18	19.4
25-34 years	66	71.0
35-49 years	1	1.1
50-64 years	7	7.5
65 and over	1	1.1

Sex

Male	47	50.5
Female	46	49.5

Purpose of travel

holiday	32	34.4
studies	5	5.4
other	56	60.2

Education

high school	39	41.9
college/technical	27	29.0
university degree/diploma	25	26.9
post-graduate degree	2	2.2

Occupational status

engineer-science	10	10.8
other profession	11	11.8
business	24	25.8
technical	1	1.1
clerical	1	1.1
other skilled	6	6.5
unskilled	13	14.0
service	7	7.5
retired	2	2.2
student	1	1.1
homemaker	17	18.3

3.3 Procedure

Questionnaires were passed to Japanese tourist companies in Melbourne. The Japanese tour operators were instructed how to distribute the questionnaires to tourists. Tour guides were asked to pass the pre-travel questionnaires to Japanese tourists arriving to Australia at airport or in bus prior to arriving to hotel. They were also asked to pass the post-travel questionnaires after tourists left hotel in bus on the way to airport or at airport after customs control.

Chapter 4

RESULTS

The collected data was coded for statistical analysis with the

help of the Statistical Package for Social Sciences (1986).

The T-test method was chosen in order to compare and analyse

sample means by calculating significance of the difference

between the means. The T-test within group was chosen to

determine whether changes in Japanese tourists' perceptions had

occurred over time of visiting Australia. The two-tailed

probability was used for the T-test in order to assess if any

differences between the means occurred regardless of their

direction. The aim was to find out if the scores between the two

questionnaires were statistically different and if the scores

between the questionnaires were higher or lower.

The use of T-test formula was used to compare Japanese

tourists' pre-and post-travel perceptions in the following areas:

a) general perceptions of Australian hosts, b) service in hotels,

c) service in food establishments, d) service at shops,

e) Australian tour guides, f) service at airports,

g) service in general, h) satisfaction with Australian hosts. The

findings are set out in Appendix C, p.154-170.

The general trend showed that on arrival only 3 (3.2%) of all

surveyed Japanese tourists considered <u>Australian hosts as</u>

<u>important</u> in choosing Australia as a tourist destination. On

departure already 45 (48.4%) Japanese tourists stated that

interaction with Australian hosts was very important for them when holidaying in Australia as shown by Figure 2, p.40.

The results of the survey showed that Japanese tourists' perceptions of Australian hosts were similar on arrival and on departure. In general, Japanese tourists considered Australian hosts as professional, friendly, honest, polite, helpful, concerned about customers' needs, punctual, with a lot of humour, on average patient, with average knowledge of Japanese language, with average understanding of Japanese needs, with average appearance, on average formal and on average financially exploitative (see Figure 3, p.41).
The T-test results revealed that scores from the pre-and post-travel questionnaire were statistically different in one area. The T-test showed that over time of visiting Australia Japanese tourists changed significantly their perception of Australian hosts' ability to speak Japanese language. On arrival Australian hosts' knowledge of Japanese language was perceived by the Japanese tourists as average. On departure Japanese tourists perceived Australian hosts as speaking significantly less Japanese language (see Table 2, p.42).

Service in hotel was considered by most of the Japanese tourists (on arrival as well as on departure) as professional, friendly, polite, helpful, concerned about quests' needs, average informative and with average knowledge of Japanese language (see Figure 4, p.43).
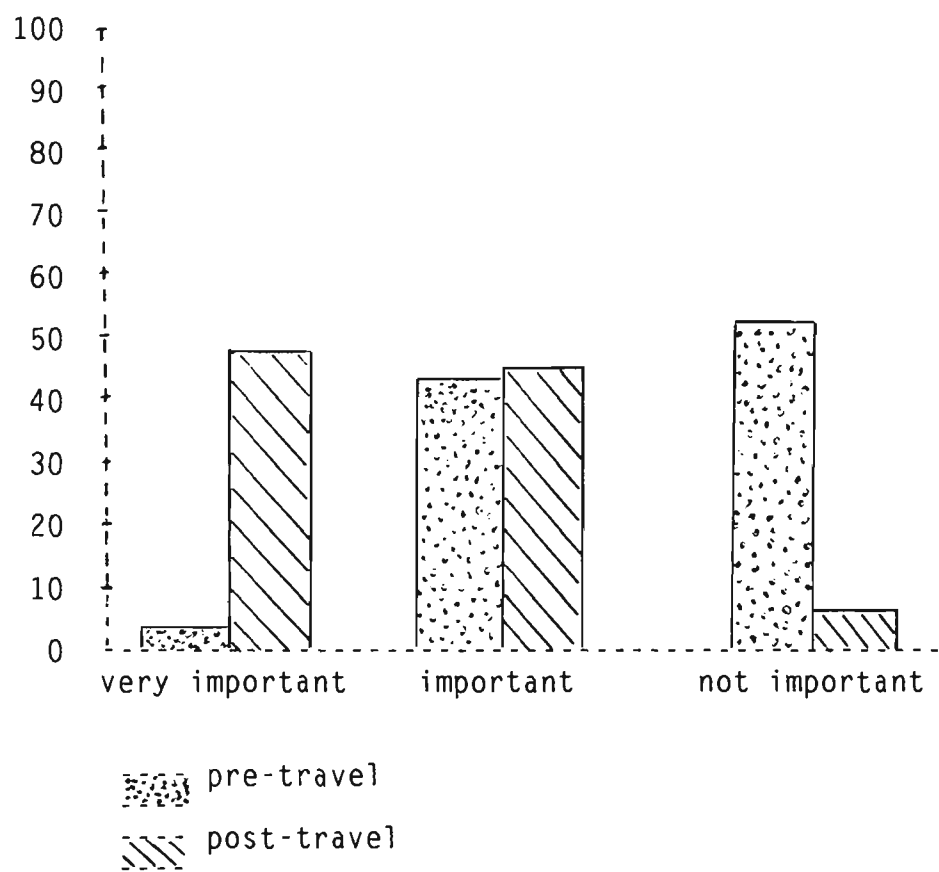
Figure 2

Japanese tourists pre- and post-travel perception of the
importance of Australian hosts in choosing
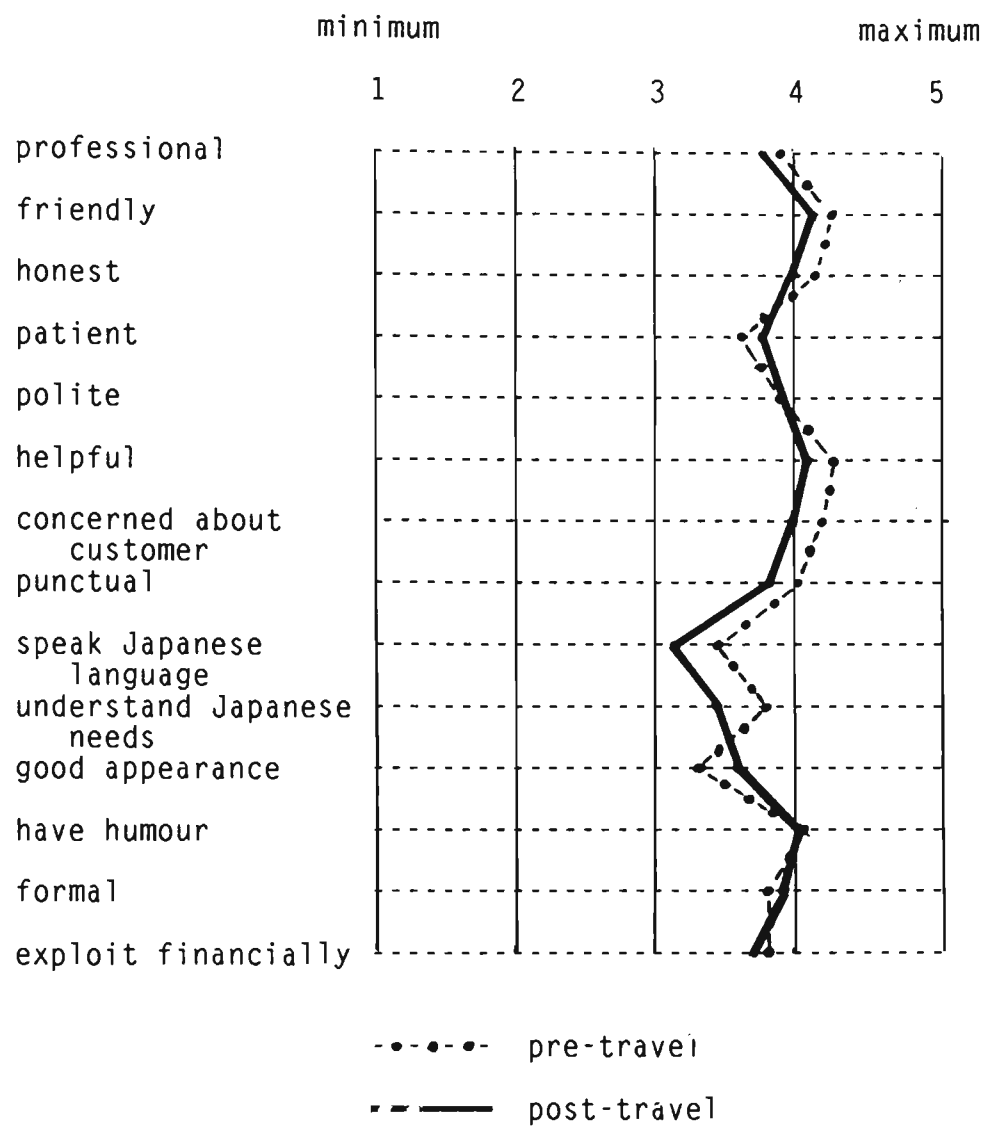Australia as a holiday destination

minimum   maximum

1   2   3   4   5

professional

friendly

honest

patient

polite

helpful

concerned about
    customer
punctual

speak Japanese
    language
understand Japanese
    needs
good appearance

have humour

formal

exploit financially

-•-•-•-   pre-travel

- ━━━   post-travel

Figure 3

Japanese tourists pre- and post travel perception
of Australian hosts

Table 2

Area of significant difference between Japanese
tourists pre- and post-travel perception of
Australian hosts

===

N=93	$\overline{X}$	T-test @
expect knowledge of Japanese	3.5591	
think knowledge of Japanese	3.2366	2.34 *

$\overline{X}$ pre- and post-travel means
@ T-test with two- tailed probability

* p<0.05   ** p<0.01   *** p<0.001

minimum   maximum

        1   2   3   4   5

professional

friendly

polite

informative

helpful

concerned about
    guests needs
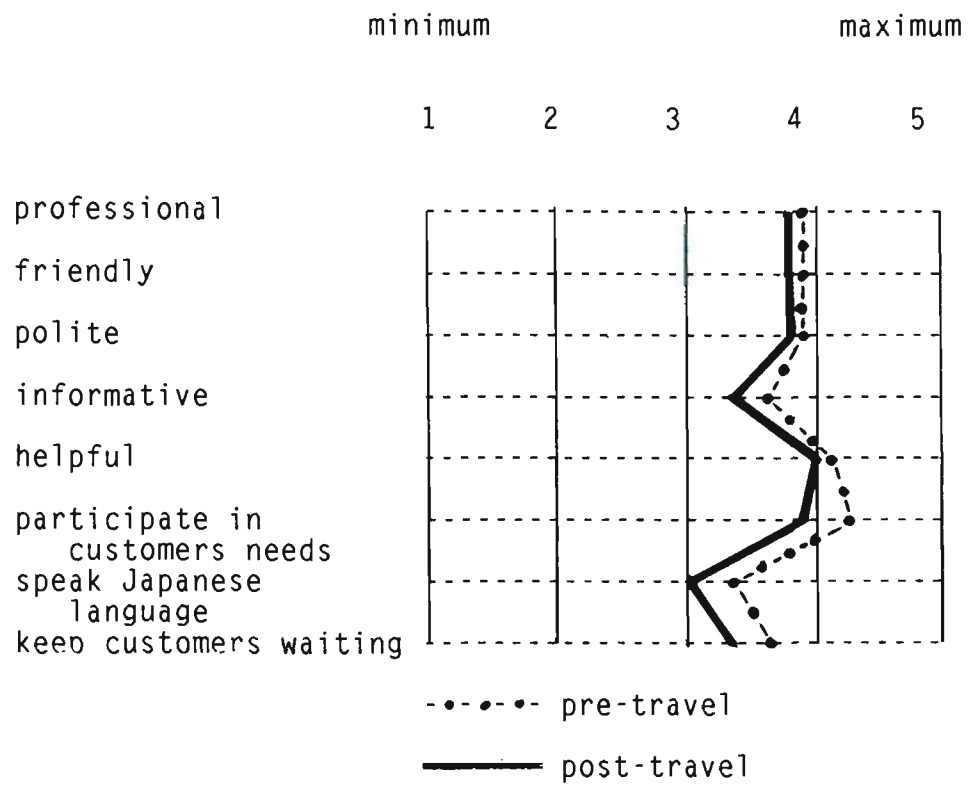speak Japanese
    language

- • - • - •-   pre-travel
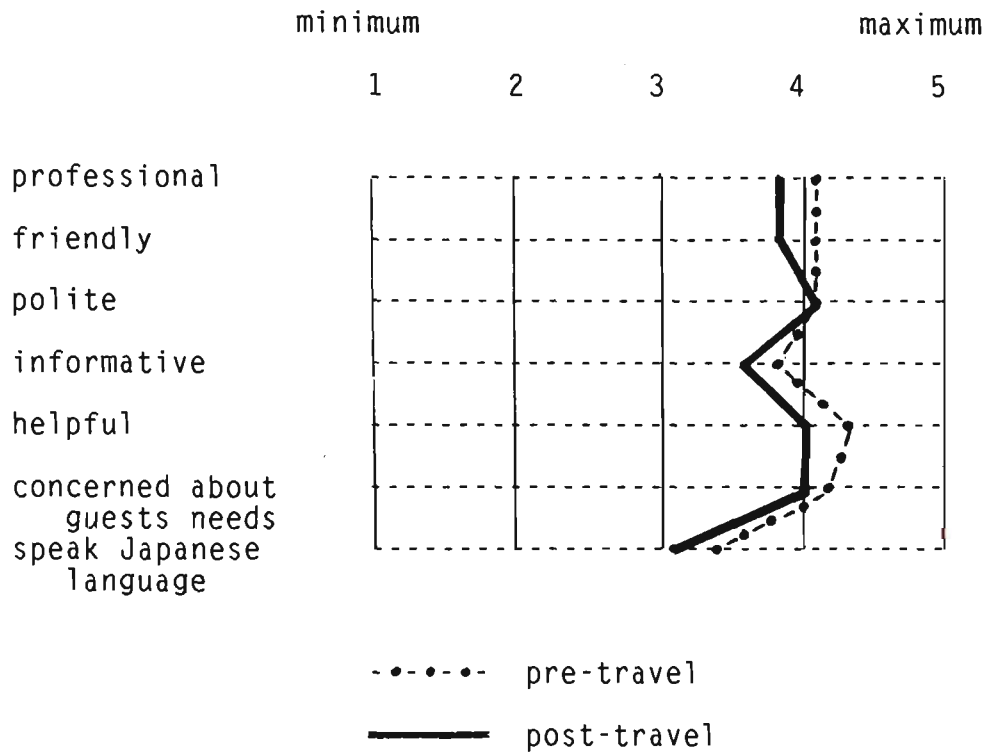
━━━   post-travel

Figure 4

Japanese tourists pre- and post-travel perception of
service in hotel

T-test showed that significant differences between responses on arrival and departure occurred in relation to hotel employees' professionalism, friendliness, information giving role, helpfulness, concern about customers and ability to speak Japanese language. (see Table 3, p.45). The biggest difference between Japanese tourists' pre-and post-travel perception of service in hotel was noted in the area of hotel employees' ability to speak the Japanese language and to be helpful. In the other areas mentioned above the differences between pre- and post-travel perception were slightly smaller, however, also significant (see Table 3, p.45). Although Japanese tourists perceived service in hotel as good and more than average, the significantly lower post-travel scores indicated that Japanese post-travel perception of service in hotels was less favourable on departure than on arrival. On departure Japanese tourists perceived hotel employees as significantly less professional, less friendly, less informative, less concerned about customers' needs and, what should be particularly emphasized, less helpful and with worse knowledge of Japanese language (see Table 3, p.45).

In regard to <u>service in food establishments</u> the results showed that most of the Japanese tourists perceived this service (on arrival as well as on departure) as professional, friendly, polite, helpful, participative in customers' needs, average informative, with average knowledge of Japanese language and respondents were kept waiting for service average length of time (see Figure 5, p.46).

Table 3

Areas of significant differences between Japanese tourists
pre- and post-travel perception of
service in hotel

==

N=93	$\overline{X}$	T-test @
expect professional	4.1413	
think professional	3.8804	2.61 **
expect friendly	4.1196	
think friendly	3.8804	2.47 *
expect informative	3.8696	
think informative	3.6413	2.49 *
expect helpful	4.3587	
think helpful	4.0543	2.88 **
expect concern about guests needs	4.2717	
think concern about guests needs	4.0109	2.44 *
expect speak Japanese language	3.5652	
think speak Japanese language	3.1196	3.34 ***

$\overline{X}$ pre- and post-travel means
@ T-test with two-tailed probability

* p<0.05   ** p<0.01   *** p<0.001

46

Figure 5

Japanese tourists pre- and post-travel perception
of service in food establishments

The T-test results showed significant differences between Japanese tourists' pre- and post-travel perception in two areas: food establishments employees' participation in customers' needs and ability to speak Japanese language (see Table 4, p.48). On arrival Japanese tourists perceived food establishments employees' knowledge of Japanese language as average and ability to participate in customers' needs as good. However, in the both mentioned areas the post-travel scores were significantly lower than the pre-travel scores which means that Japanese tourists' post-travel perception of food establishments employees' ability to speak Japanese language and ability to participate in customers' needs were less favourable on departure than on arrival. On departure Japanese tourists perceived food establishments' employees as significantly less able to speak Japanese language and less able to participate in customers' needs (see Table 4, p.48).

Only in one area the lower post-travel scores indicated positive change in Japanese tourists' perception of service in food establishments. Japanese tourists said that they did not have to wait for service as long a time as they thought they would. They waited for service a shorter time they have perceived they would wait. However, it should be stated that difference between pre- and post-travel perception in this case was not significant but close to significant at p<0.05 level (see Table 17, p.164).

Service at shops was considered (on arrival as well as on departure) as friendly, helpful, average polite, average informative, on average concerned about customers' needs, with

Table 4

Areas of significant differences between Japanese
tourists pre- and post-travel perception of
service in food establishments

===

N=93	$\overline{X}$	T-test @
expect participation in customers needs	4.2043	
think participate in customers needs	3.9032	2.88 **
expect speak Japanese language	3.4946	
think speak Japanese language	3.0215	3.61 ***

$\overline{X}$ pre- and post-travel means
@ T-test with two-tailed probability

* p<0.05   ** p<0.01   *** p<0.001

average knowledge of Japanese language, with average wrapping
skills and average financial exploitation (see Figure 6, p.50).
The T-test results showed that significant differences between
pre- and post-travel perception of service at shops occurred in
four areas. Japanese tourists significantly changed their
perception in regard to shop assistants' information giving role,
helpfulness, concern about customers' needs and ability to speak
Japanese language (see Table 5, p.51). Japanese tourists
evaluated service at shops in these areas as between average and
good. However, the lower post-travel scores in all of the above
mentioned areas and T-test results showed that Japanese tourists'
post-travel perception of service at shops in these areas was
less favourable on departure than on arrival. On departure
Japanese tourists perceived shop assistants as significantly less
informative, less helpful, less concerned about customers' needs
and less able to speak Japanese language than they perceived on
arrival to Australia (see Table 5, p.51). Additionally, although
it seems that on departure Japanese tourists also perceived shop
assistants as less polite than they perceived on arrival, the
difference between pre- and post-travel perception was not
significant but close to significant at p<0.05 level (see
Table 18, p.165).

In relation to <u>Australian tour guides</u> pre- and post-travel
responses were similar in most of the areas. Japanese tourists
perceived Australian tour guides (on arrival as well as on
departure) as qualified, friendly, polite, informative, helpful,
fulfilling tourists' needs, speaking good Japanese language,

minimum   maximum

1   2   3   4   5

friendly

polite

informative

helpful

concerned about
    customers needs
speak Japanese
    language
demonstrate wrapping
    skills
exploit financially
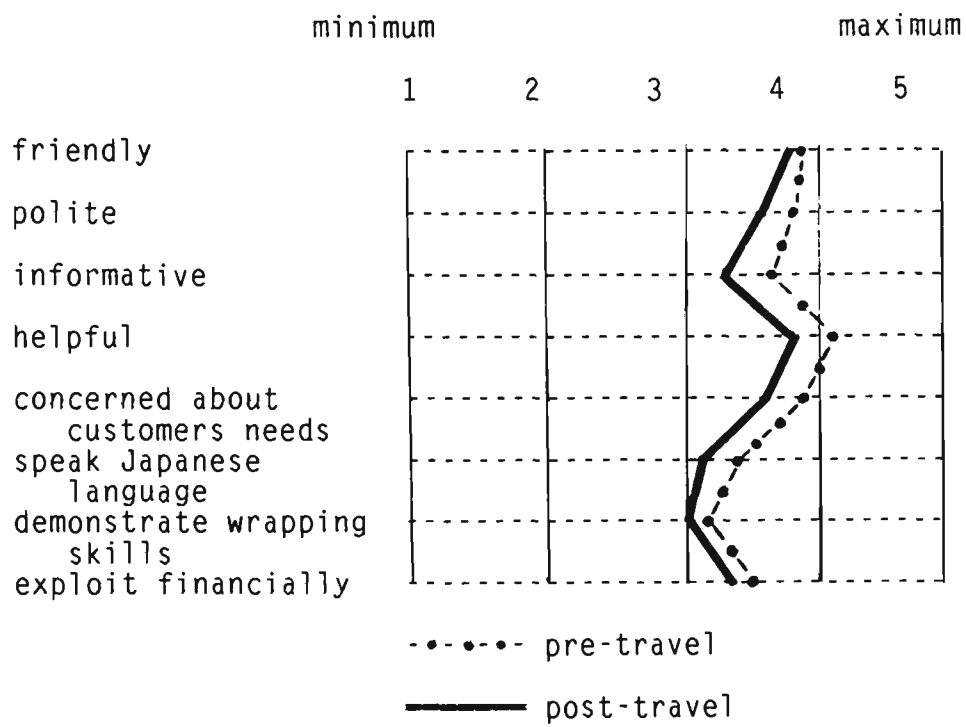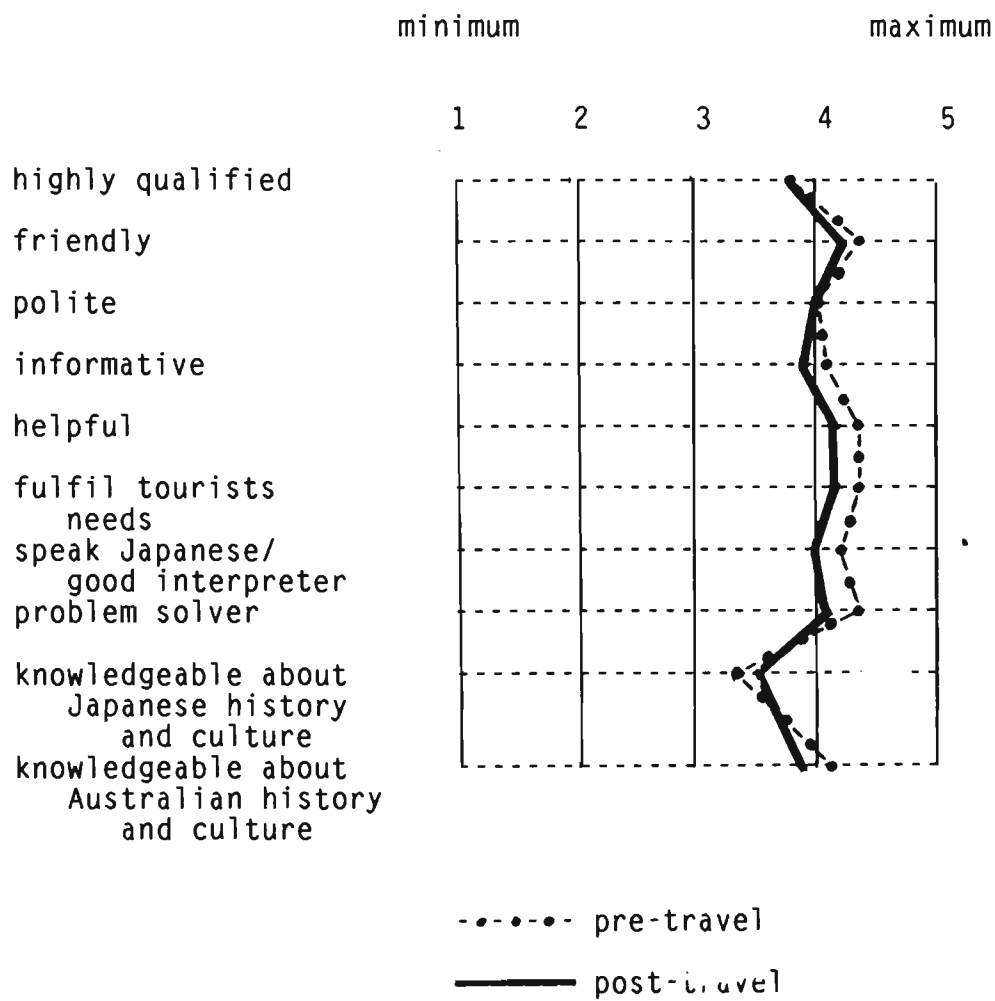
- • - • - • - pre-travel

━━━━ post-travel

Figure 6

Japanese tourists pre- and post-travel perception of
service at shops

Table 5

Areas of significant differences between Japanese
tourists pre- and post-travel perception of
service at shops

==

N=93	$\overline{X}$	T-test @
expect informative	3.6667	
think informative	3.3763	3.28 ***
expect helpful	4.1720	
think helpful	3.8172	3.40 ***
expect concern about customers needs	3.9785	
think concern about customers needs	3.6989	2.63 **
expect knowledge of Japanese language	3.4516	
think knowledge of Japanese language	3.1828	2.35 *

$\overline{X}$ pre- and post-travel means
@ T-test with two-tailed probability

* p<0.05   ** p<0.01   *** p<0.001

solving problems well, knowledgeable about Australian history and culture and on average knowledgeable about Japanese history and culture (see Figure 7, p.53).

The T-test results showed that Japanese tourists' pre-travel perception of Australian tour guides significantly differed from their post-travel perception in the area of information giving role. On departure Japanese tourists perceived Australian tour guides as significantly less informative (see Table 6, p.54). Although it seems that on departure Japanese tourists also perceived Australian tour guides as less knowledgeable about Australian history and culture, in this case the difference between pre- and post-travel perception was not significant but very close to significant at $p < 0.05$ level (see Table 19, p.167).

In regard to service at airports Japanese tourists' pre- and post-travel perceptions (on arrival as well as on departure) were similar in most of the tested areas. Japanese tourists perceived airport employees as helpful, average friendly, average polite, average informative and with average knowledge of Japanese language (see Figure 8, p.55).

Significant difference was also noted between Japanese tourists' pre- and post-travel perception of service at airport. On arrival Japanese tourists perceived airport employees' ability to speak Japanese language as average. The lower post-travel scores and T-test result indicated that on departure Japanese tourists perceived airport employees as significantly less able to speak Japanese language (see Table 7, p.56).

minimum   maximum

                1   2   3   4   5

highly qualified

friendly

polite

informative

helpful

fulfil tourists
    needs
speak Japanese/
    good interpreter
problem solver

knowledgeable about
    Japanese history
        and culture
knowledgeable about
    Australian history
        and culture

- ·-·-·- pre-travel

——— post-travel

Figure 7

Japanese tourists pre- and post-travel perception of
Australian tour guides

Table 6

Area of significant difference between Japanese tourists
pre- and post-travel perception of
Australian tour guides

==

N=80	$\overline{X}$	T-test @
expect informative	4.1500	
think informative	3.9250	2.58 *

$\overline{X}$ pre- and post-travel means
@ T-test with two-tailed probability

* p<0.05   ** p<0.01   *** p<0.001
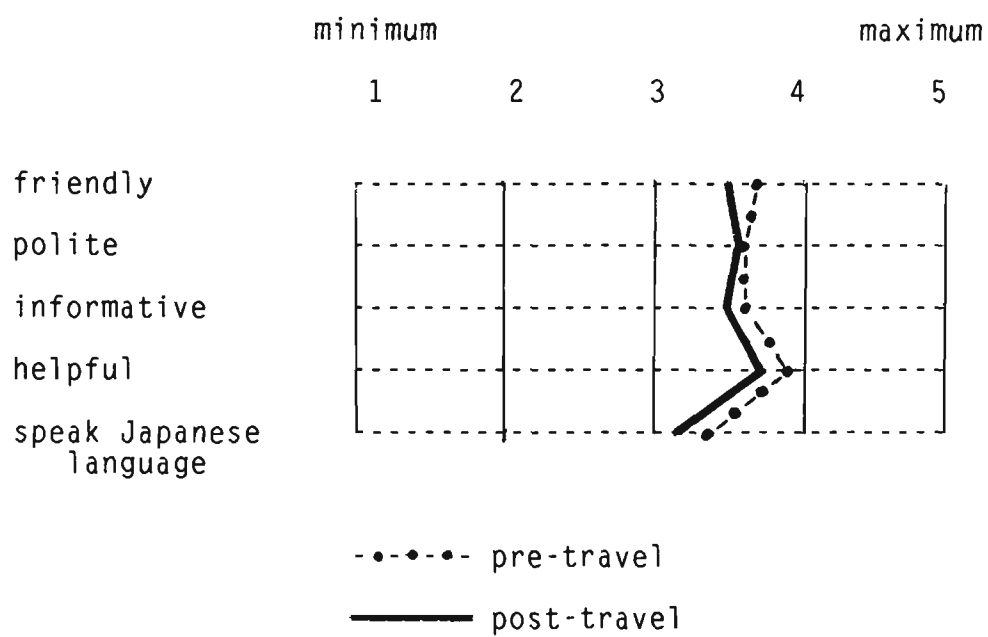
Figure 8

Japanese tourists pre- and post-travel perception of
service at airport

Table 7

Area of significant difference between Japanese tourists
pre- and post-travel perception of
service at airport

===

N=93	$\overline{X}$	T-test @
expect knowledge of Japanese language	3.4946	
think knowledge of Japanese language	3.2258	2.11 *

$\overline{X}$ pre- and post-travel means
@ T-test with two-tailed probability

* p<0.05   ** p<0.01   *** p<0.001

In general, most of the Japanese tourists perceived <u>service</u> <u>provided</u> by Australian hosts as average. However, on departure less respondents 42 (45.2%) than on arrival 48 (51.6%) said service in Australia was average and on departure more respondents 40 (43%) than on arrival 37 (39.8%) said service was good (see Figure 9, p.58).

Although the post-travel scores were minimally higher than the pre-travel scores indicating that on departure Japanese tourists' perception of service in general was more favourable than on arrival, T-test analysis of Japanese tourists' pre- and post-travel perception of service showed that the difference between pre- and post-travel scores was not significant at p<0.05 level (see Table 21, p.169).

In general, most of the respondents (on arrival 65 (69.6%) and on departure 60 (64.5%) perceived their <u>satisfaction</u> with Australian hosts as moderate. However, on departure less respondents were little 7 (7.5%) and moderately 60 (64.5%) satisfied and more respondents were very satisfied 25 (26.9%) (see Figure 10, p.59).

The T-test results showed that the average level of satisfaction with Australian hosts was low (see Table 22, p.170). Although the post-travel scores were even lower than the pre-travel scores indicating that on departure Japanese tourists were even less satisfied with Australian hosts than they perceived on arrival, the difference between pre- and post-travel scores was not significant (see Table 22, p.170). The difference was, however, close to significant at p<0.05 level. It seems that the Japanese
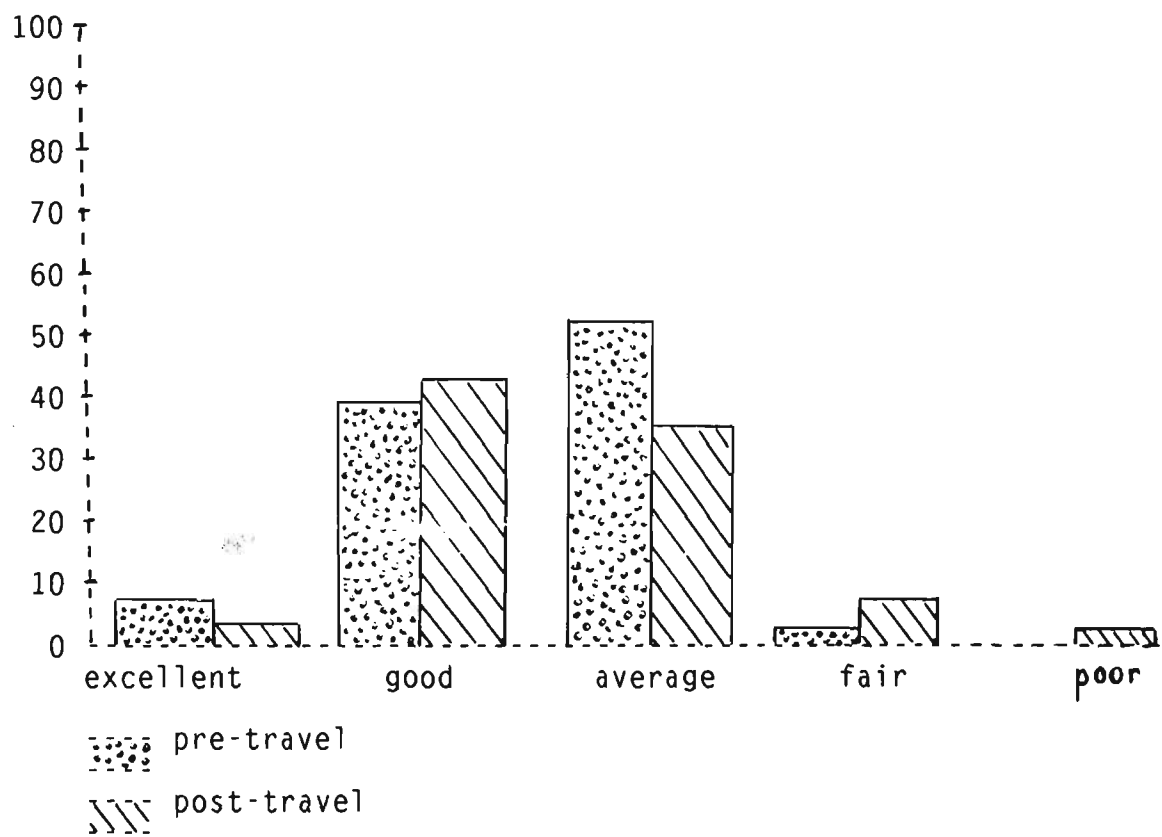
Figure 9

Japanese tourists pre- and post-travel perception of
service in general
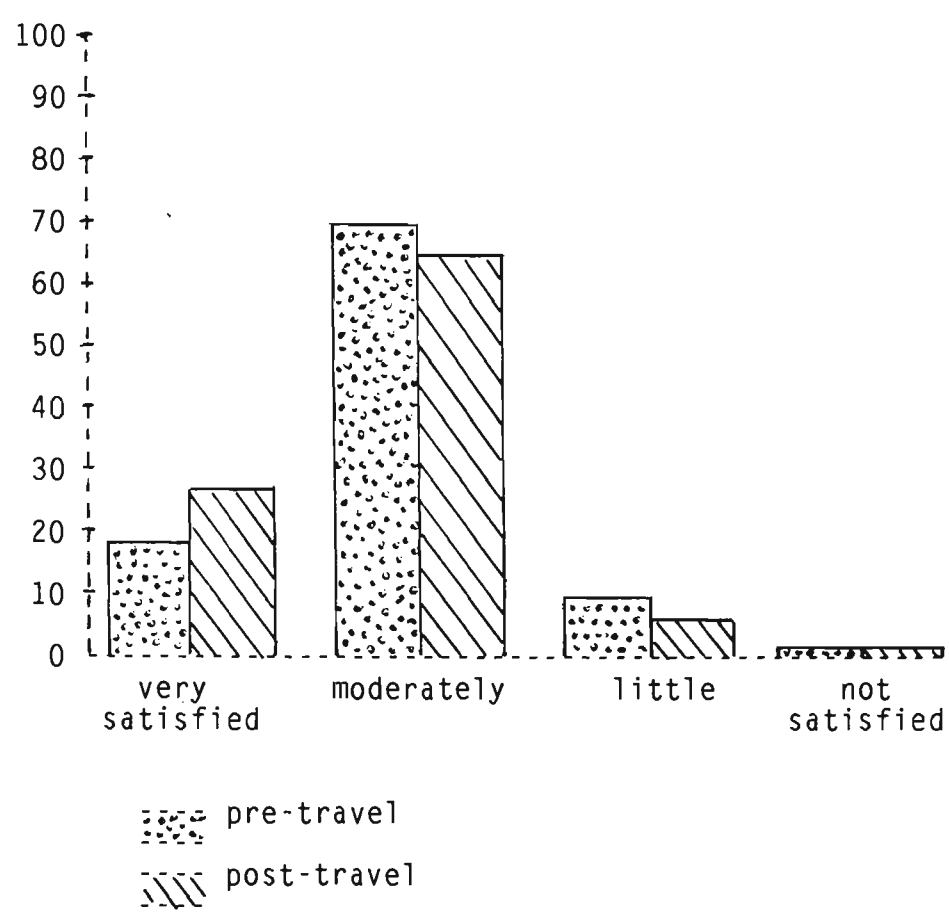
Figure 10

Japanese tourists pre- and post-travel perception of
satisfaction with Australian hosts

tourists' level of satisfaction with Australian hosts might be a very important issue for future consideration.

In short, 52 areas of service provided by Australian hosts were tested. In most (37) of the areas Japanese tourists' pre- and post-travel perceptions of service were similar. In general, Japanese tourists assessed service provided by Australian hosts as average. There were many positive aspects of service provided by Australian hosts mentioned by Japanese tourists like: friendliness, honesty, patience, punctuality,etc. (see Appendix C for the areas with insignificant differences between Japanese tourists' pre- and post-travel perceptions, p.161-170).
In 15 areas where differences were significant, Japanese tourists indicated their disappointment with: the Australian hosts' ability to speak Japanese language; hotel employees' professionalism, friendliness, helpfulness, concern about guests' needs, ability to speak Japanese language and ability to provide Japanese tourists with sufficient information; food establishments employees' participation in customers' needs and ability to speak Japanese language; shop assistants' helpfulness, concern about customers' needs, ability to speak Japanese language and ability to provide tourists with sufficient of information; Australian tour guides' ability to provide tourists with sufficient information; and airport employees' ability to speak Japanese language. In these areas T-test results revealed significant differences between Japanese tourists' responses on arrival and on departure (see tables with the areas of the significant differences between Japanese tourists' pre- and post-

travel perceptions, p.42,45,48,51,54,56). In all 15 areas post-travel scores were lower than pre-travel scores thus indicating that in those areas Japanese tourists' perceptions of service on departure were significantly less favourable than on arrival.

The general satisfaction level with Australian hosts was assessed between moderately and very satisfied.

Overall, more than half of the respondents said they would come back to Australia with 50%-80% certainty when thinking about service and only one third of the respondents said they would come back to Australia with 81%-100% certainty (see Table 14, p.160).

Additional comments which Japanese tourists made on the _pre-travel_ questionnaire were as follows:

- I think that interaction with Australian hosts will be very difficult

- I would not like to have any problems due to different customs

- I would like Australian to help me if I have any problems

- I am afraid of mixing together with those who do not speak my language

- I would not wish to speak English in front of English speaking people and make mistakes

- I think I will not understand English

- I think I will have difficulties with expressing myself in English language

- It would be nice to meet Australian hosts who speak even little Japanese

- In case of lack of Japanese tour guides I would like to be guided by Australian tour guide who speaks Japanese language
- I would like to meet and talk to people on the street
- I wish to have time and mix with other Australians than in hotel and restaurant
- I would like to make friendship with Australians but I think it would be very difficult
- I expect excellent service in restaurant in spite of the bad experience of my friends who previously holidayed in your country
- I think Australians are very friendly
- I would like to relax and have a nice time
- I wish to have Japanese food in case I do not like Australian food
- I would like to play golf with Australians if time available

In short, in response to the open-ended questions on arrival Japanese tourists expressed fear of communication problems, of problems arising due to different language, of not being understood by Australian hosts and not being able to express themselves properly in English language. They perceived that Australian hosts would have the basic language skills necessary to communicate with Japanese. Although Japanese tourists perceived that interaction with Australian hosts could be difficult, they wished to meet and mix with local Australians on a street, make friendship, play golf,etc.

Japanese tourists expected excellent standard of service and awareness of their needs. They wished to relax and have a nice time while holidaying in Australia.

Additional comments which Japanese tourists made on the post-travel questionnaire were as follows:

- It was very easy to interact with Australian hosts

- Australians are very pleasant and friendly

- Overall, I have good impression from holidaying here

- It was good to see Japanese translations and signs where the Japanese were going to, it added to the overall enjoyment of stay

- It would be better if Japanese speaking people would be at airport

- If Australians would have better language skills it would be easier to have good time in your country

- It would be better if people in hotel could speak Japanese language

- I was pleased that there were Japanese serving in the shops, in other shops I could not communicate with Australians

- Australians speak English too quick

- Australians do not speak Japanese at all, before I came to Australia I thought they spoke a little

- Why Australians do not speak Japanese language?

- It is difficult for the Japanese to mix together with those who do not speak Japanese language. More effort should be made to teach Australians Japanese language. Why my tour guide was Japanese?

- Do Australian tourism industry officials know some Australian tour guides who can guide Japanese groups?

- Why I did not meet Australian tour guide? Do you have your own tour guides?

- *Introduce more Australian tour guides!*

- *I think it would be better to introduce more Australian guides*

- *Hotel service was quite good but I would like to have hair-dryer in my room*

- *Service in restaurants maybe is good but it does not really suit Japanese taste*

- *Service in general was not good*

- *Australians do not know how to serve the customer, we prefer to be served by Japanese waitresses*

- *Why Australian waitresses are so slow?*

- *Very bad service, the best is in Japan. Japan is number 1!*

- *I did not like service in Australia because service in Japan is excellent*

- *Do not employ Japanese people living in Australia to serve Japanese tourists. These people speak Japanese perfectly but they are not professionals in tourism industry. Give us professional Australians and teach them Japanese language*

- *Improve your service because service in Europe is better*

- *Europeans do not like Japanese either but they offer better service*

- *You have excellent facilities but bad service*

- *We prefer to go to Europe: they have history, better service and they are more professional than Australians*

- *Nice holiday but service was poor*

- *Australians do not care about tourists like Europeans do*

- *Australians do not know how to wrap souvenirs, Japanese know better*

- *We did not know what to buy for souvenirs*

- It was too much food at Hilton Hotel

- Overall, I had really very good time here except strikes. What is Australian food?

- It would be better to have more Japanese food, Australian food is too heavy

- I was waiting too long at flight to Melbourne at Sydney airport and I was not able to fill in time: there were not many souvenirs shops, it was also dirty

- It was dirty in shops

- Australians trust only documents

- Australians do not like Japanese

- My perception about Australian hosts changed since I arrived to Australia but not for better

- It was nothing to do in the evening

- Australia is an easy country to travel for Japanese people but I do not want to come back here if there are strikes

- I would come back to Australia in 100% but I will not because there are too many strikes in your country

In short, in response to the open-ended questions on departure Japanese tourists placed a great emphasis on service. Although Japanese tourists perceived Australians as very friendly and pleasant, they were not impressed by standard of service provided by Australian hosts. It seems that one of the most important issues for Japanese tourists was the communication problem. Japanese tourists were disappointed with Australian hosts inability to speak Japanese language. Availability of Australian tour guides speaking proper Japanese language was also regarded

as a problem. Japanese tourists expressed the view that they preferred to be guided by Australian tour guides who speak Japanese language rather than by Japanese tour guides. Japanese tourists were also disappointed with service in hotel (employees' inability to speak Japanese language), service in restaurants (slow service, heavy food not suitable Japanese taste), service at airports (long waiting time at flight, inability to fill in time due to insufficient number of souvenir shops). Tourists also expressed anxiety about cleanliness at airports and shops. They were disappointed with their shopping needs (difficulties with buying Australian made products, innappropriate packaging, presentation). Although Australia has excellent facilities, Japanese tourists complained about unprofessional and not caring service in Australia, suggesting that service in Europe is better. They also expressed their opinion that the Australian hosts' attitude toward Japanese tourists is not welcoming and not trusting. Japanese tourists expressed their view that they would not return to Australia due to too many strikes and difficulties in travelling within the country. They said that their opinion was less favourable about Australian hosts since they arrived in Australia.

In summary, although there were many positive aspects of service provided by Australian hosts like friendliness, honesty, patience, punctuality, etc., in several areas of service the expectations of the Japanese tourists were not met and tourists indicated some negative aspects of service, for example:

inability of Australian hosts to speak Japanese language at the expected level, to participate in tourists' needs, to provide them with sufficient information, etc.

For more findings refer to the researcher of this study.

Chapter 5

DISCUSSION

In the light of declining rate of growth in Japanese tourist arrivals to Australia in 1989, it is more appropriate to emphasize and analyze the negative aspects of service creating problems in satisfying Japanese tourists. Such an approach is necessary in order to avoid further mistakes, to attract more Japanese tourists and maximise benefits from improved relationships between Australian hosts and Japanese tourists. All positive aspects of service mentioned by Japanese tourists should be maintained.

In order to be able to answer the question why Japanese tourists' post-travel perceptions of Australian hosts and service provided were in several areas less favourable than their pre-travel perceptions, the social and cultural motivations and differences in morality and ethics of Japanese tourists should be taken into account. Through their long history the Japanese have absorbed a variety of philosophies and religious beliefs and traditions, which by establishing some basic rules of Japanese life, have affected Japanese behaviour, reactions, expectations from life and other people, and influenced their attitudes toward any aspect of their life, work and leisure.

It seems that one of the most important issue for the Japanese visiting Australia was the communication problem. Japanese tourists expected Australian hosts to have average knowledge of their language in most of the tested areas (hotels, food establishments, shops, airports). They were disappointed with Australian hosts' inability to speak Japanese language at the expected level. Japanese tourists saw Australian hosts as speaking significantly less Japanese language than was perceived by them before they arrived to Australia (see Table 2, p.42). Therefore, it seems that the knowledge of Japanese language by Australian hosts is very important to Japanese tourists.

According to Japanese tourists it is very difficult for them to learn English language. Although English is compulsory at schools, Japanese tourists perceived Australian hosts as not expecting that every Japanese tourist would speak English. According to Japanese tourists' comments on the pre-travel questionnaire they wished Australian hosts to have some basic command of Japanese language and to be relieved from communication difficulties. According to Japanese tour guide (1989) Japanese people are shy and in order to avoid making mistakes they usually do not speak their poor English in front of English speaking people.

Traditionally, in Japan all foreign tourists are treated like guests (Zimmerman, 1985). Japanese put a lot of effort in making tourists feel at home and do everything to satisfy them. When the Japanese are visiting foreign countries they expect to receive similar hospitality during their trip. So they appreciate it when foreign hosts also make special efforts to make them feel

welcome. Thing like hosts' ability to speak guests language is important especially when Japanese tourists are away from home, when they feel lonely, uneasy around foreigners and wish to be understood.

Japanese tourists expect that once they visit Australia, Australian hosts would have some basic command of Japanese language in order to be able to communicate effectively with Japanese, to understand them, and give appropriate explanation when required. As guests, Japanese tourists expect Australian hosts to speak Japanese language and in Japanese tourists' opinion it was one of the ways for Australian hosts to show positive and caring attitudes to Japanese tourists. It would also be a sign that Japanese tourists are welcome in Australia and that efforts have been made to satisfy them.

Unfortunately, Japanese tourists could not communicate easily with Australian hosts, neither in hotels, airports nor at shops (see comments on post-travel questionnaire, p.63). Japanese tourists were disappointed with the poor Japanese language skills of Australian hosts. Despite a great wish to meet and talk to Australians they were not able to mix with those who did not speak Japanese language. It was a reason why Japanese tourists were dissatisfied with Australian hosts ability to speak Japanese language.

The results of this study supported McArthur's (1988) statement that Japanese tourists are dissapointed with the language and communication problems, Kennedy's (1988) view that service staff do not make any effort to break through the

language barrier and McGee's (1988a) opinion that the Japanese tourists to Australia regard communication with Australians as significant when they assess their travel experience.

The results also support the researcher's assumptions that Australian hosts do not meet all Japanese tourists' expectations thus creating disappointment and dissatisfaction for Japanese tourists with Australian hosts.

It is interesting to notice that Japanese tourists' pre-travel perception of Australian hosts ability to laugh and make jokes matched Japanese tourists' post-travel perception (see Table 15, p.162). It seems that Japanese tourists' expectations in this area were met.

On arrival, service in hotel had been perceived by Japanese tourists as professional.
Traditionally, Japanese by themselves are very competent and professional in their work. Shintoism created the Japanese drive to perfectionism and precision. Confucianism emphasized the importance of hard work. Japanese appreciate any work precisely and perfectly done and respect anyone who is professional (Zimmerman, 1985). According to Japanese tour guide (1989) if Japanese tourists know the foreign hosts are able to handle problems in a professional manner they feel relaxed and quiet. This is the reason why Japanese tourists expected hotel employees to be very competent and professional in their work.

Unfortunately, on departure Japanese tourists perceived service in hotel as significantly less professional (see Table 3, p.45). Japanese tourists complained about service in hotels, in their opinion service was bad due a lack of Australian hosts' knowledge of how to serve customers. The Japanese did not like Australian service and they expressed the view that they prefer to be taken care of by Japanese who are more competent in their work. They called for a more professional approach by Australian hosts serving Japanese tourists (see comments on post-travel questionnaire, p.64). Although Japanese tourists appreciated excellent facilities in Australia, they expressed the view that they prefer to go on holiday to Europe where they could get better, professional and more caring service (see comments on post-travel questionnaire, p.64).

The results supported McArthur's statement (1988), that service provided for Japanese is not always positive, that Japanese complain about a lack of professional service. Similarly, Ostrow's view (1988) suggests that Japanese are not satisfied with service in Australia, Australian hosts do not know how to access a whole range of fairly complex services and only hoteliers who understand Japanese likes and dislikes will come into the Japanese market quickly.

The results also support the researcher's assumptions that Australian hosts do not meet all Japanese tourists' expectations and Japanese tourists, in regard to hotel employees' competence to serve them, are disappointed and not satisfied.

Additionally, on arrival Japanese tourists perceived hotel employees as friendly, helpful and concerned about guests needs. However, on departure tourists perceived hotel employees as significantly less friendly, less helpful and less concerned about guests needs (see Table 3, p.45).

In Japanese language the word tourist means sightseeing guest and it is widely known that Japanese treat their own guests as kings, with honour, they anticipate and fulfil guests' needs immediately. Japanese are famous for their courtesy and hospitality (Zimmerman, 1985). All efforts are directed into making guests welcome, for example by offering guests hot bath, providing guests with slippers, serving drinks on arrival, etc. These efforts make guests feel that their personal needs are anticipated and guests are welcome. Japanese guests expect foreign hosts to be concerned about their needs and to anticipate these needs. If a problem arises Japanese tourists expect hosts to help them and handle the problem properly. On arrival Japanese tourists hoped not to have any problems due to different customs and life style in Australia. They expected to be helped if any problem arose (see comments on pre-travel questionnaire, p.61). It was very important issue for them particularly in the situation when they were not able to express themselves and own needs in English language. Japanese tourists hoped that their needs would be anticipated by Australian hosts. They also perceived Australian hosts as friendly and hoped to make some friendship with Australians, even though they were aware of communication difficulties. As guests in a foreign country Japanese tourists expected to be treated similar to foreign

guests in Japan. It is necessary to realize that the Japanese have many anti-foreign prejudices. They do not trust foreigners and have to overcome many prejudices before they become friends with Westerners (Zimmerman, 1985). Despite many anti-foreign prejudices they can be very friendly, loyal and helpful to foreign tourists visiting Japan (Zimmerman, 1985), probably due to their full understanding of the needs and rights of foreign guests and their own duties as hosts.

Unfortunately, hotel employees in Australia did not meet expectations of Japanese tourists in the above mentioned areas. On departure Japanese tourists perceived hotel employees as not caring enough about Japanese needs, nor were these needs anticipated. Tourists expressed views that Australian hosts did not care about them like European hosts do, they complained about basic facilities in hotel rooms which they expected to find and would normally be provided in hotel rooms in Japan. Japanese tourists gained the impression that Australians did not like Japanese and Australian hosts' attitudes toward Japanese tourists were not welcoming due to a lack of concern about their basic needs (see comments on post-travel questionnaire, p.64).

The researcher's results support Kennedy's opinion (1988) that Japanese tourists may find hotel employees in Australia not helpful and not caring about tourists' needs.

The results support the researcher's assumptions that not all Japanese tourists' expectations are met by Australian hosts. In the above mentioned case Japanese tourists were disappointed with

hotel employees' attitude to them, lack of concern about tourists' needs and inability to help Japanese tourists when they required help.

Additionally, on arrival Japanese tourists expected hotel employees to provide them with sufficient information. However, on departure tourists said that hotel employees were significantly less informative than tourists expected on arrival (see Table 3, p.45).

Most of the Japanese who travelled to Australia had never visited Australia before. It was the first visit to Australia for about ninety eight percent of respondents. According to Japanese tour guide (1989) Japanese usually feel lost and are too shy to ask many questions. However, they require a lot of information and they expect to be provided with as detailed information as possible. For example, in regard to hotels Japanese tourists need to get familiar with all the facilities and services available to them, accomodation procedures, safety regulations, etc. Unfortunately, the hotel employees were not able to provide Japanese tourists with sufficient information and explanations to faciliate their stay in a hotel. This is the reason why Japanese tourists were disappointed with hotel employees' information giving role and gave less scores on departure than on arrival. It also seems that the provision of all necessary information and explanations while staying in a hotel is very important to Japanese tourists.

Although in one area (politeness) there is no significant difference between pre- and post-travel perceptions indicating that Japanese tourists' need was fulfilled in this area, in all the other areas of hotel service Japanese tourists' needs were not fulfilled (see Table 16, p.163). Once again the researcher's assumption that not all the Japanese tourists' needs were fulfilled has been supported by the results of this study.

The expectations of Japanese tourists in regard to service in food establishments were not met in two areas (see Table 4, p.48). It concerns ability of food establishments' employees to participate in customers' needs and ability to speak Japanese language.

Japanese are pleased when they are taken to the top class restaurants where service is top quality (Zimmerman, 1985). They are very well known for excellent service and excellent quality of product. They like their own food and appreciate when served with their Japanese specialities. However, when they leave their country they try to eat Western food as a part of their discovery of different cultures (Zimmerman, 1985). When abroad they expect only high quality service and product.

According to comments on the pre-travel questionnaire (p.62) Japanese tourists expected only top quality service in Australia, they perceived Australian hosts would be able to serve Japanese tourists properly and in case they would not like Australian food they wished to have Japanese food.

Unfortunately, Japanese tourists did not receive service in food establishments as they expected on arrival. Although Japanese

tourists wished to taste Australian food, food in restaurants did not suit their tastes. According to the post-travel comments Australian food was too heavy for Japanese tourists (p.65). Tourists complained that there was not enough Japanese food in restaurants and service was not good (p.64,65). They complained that Australian waitresses did not know how to serve customers, service was slow (p.64). Some of the Japanese tourists expressed a preference to be served by Japanese waitresses. Other tourists preferred to be served by professionally trained, Japanese language speaking Australian waitresses (p.64). Tourists felt that food establishment employees were not concerned enough with customers' needs such as, for example: the need for food more suitable Japanese tastes or more Japanese food, and the need to be served promptly and properly by Japanese speaking waitresses (p.64,65).

Although in two areas of service in food establishments (participation in customers' needs and ability to speak Japanese language) the Japanese tourists' expectations were not met by Australian hosts, the results of this study showed that in all other areas of service (eg.: professionalism, friendliness, politeness, helpfulness) there was no differences between the two occasions and Japanese tourists' expectations were met (see Table 17, p.164).

The study results do not support McArthur's and Harrington's statements (1988) that Japanese tourists complain about unprofessional service at restaurants.

The results of this study only partially reflect the present study assumptions.

In one area of service in food establishments the lower post-travel scores seem to indicate positive change in the Japanese tourists' post-travel perceptions. On departure Japanese tourists said they did not have to wait a long time to be attended in food establishments as they thought they would (see Table 17, p.164). For Japanese time is very important. According to Ostrow (1988) Japanese get very upset if they are forced to wait. Because they usually take a few days holiday in a year with the long weekend and stay a very short time in Australia while on holiday, they do not like to and do not expect to be kept waiting. They expect to be attended immediately.

Most of the surveyed Japanese tourists expected to wait for service an average length of time. On departure they indicated that the length of time necessary to wait in order to be attended by Australian waitresses was shorter than they expected. It looks that Japanese tourists were not disappointed with the performance of food establishments' employees in this area. However, as can be seen in Table 17, p.164, the positive change in the post-travel perception was not significant. Therefore, it can not be stated definitely that Japanese tourists were really satisfied with the prompt service nor that Japanese tourists were dissappointed with the slow service in Australia.

Therefore, the study results do not support Kennedy's opinion (1988) that Japanese tourists complain Australian waitresses are

lazy and McGee's (1988a) view that Japanese tourists are dissapointed with slow service.

However, it seems that the length of a time customer must wait in food establishments in order to be attended by hosts might be very important to Japanese tourists.

In regard to <u>service at shops</u> Japanese tourists' post-travel scores indicated that on departure tourists perceived shop assistants as significantly less informative, less helpful, less concerned about customers' needs and with less ability to speak the Japanese language (see Table 5, p.51).
Japanese tourists expected shop assistants to be helpful, to provide personal service, to anticipate tourists' needs, to supply tourists with all necessary information, to give advice regarding purchasing goods and to have some command of Japanese language in order to faciliate and speed up Japanese tourists' decision-making in relation to shopping. Unfortunately, Japanese tourists were disappointed with shop assistants because, in the first instance, shop assistants were not able to speak Japanese language and communicate effectively with tourists which created difficulties in providing tourists with necessary information. According to the post-travel comments tourists complained that they did not know what to buy for souvenirs (p.64). The reasons for such complaints could be shop employees' inability to supply tourists with professional advice regarding the purchased goods, shop employees' inability to assist tourists and help to choose appropriate souvenirs (if available) and be concerned about tourists' needs. Japanese tourists also complained about

insufficient number of souvenir shops, dirt in shops and unprofessional packaging (see comments on post-travel questionnaire, p.64,65).

The study results support McArthur's statement (1988), that Japanese tourists are not happy with their shopping needs.

Traditionally, Japanese always try to be very polite to each other and to avoid any rudeness or insult in any interpersonal relations (Zimmerman, 1985). According to Japanese tour guide (1989) if Japanese are not served properly they expect to hear the word "sorry". Apologizing in Japan is an expression of politeness (Zimmerman, 1985). According to Japanese tour operator (1989) service in Japan is very personal and customers' needs and wants are anticipated.

Therefore, when abroad Japanese expect similar behaviour on behalf of their hosts. On arrival Japanese tourists perceived Australian shop assistants to behave in ways which would indicate politeness. Japanese do have certain amount of gestures and rules which indicate politeness, for example: bowing. However, they usually do not expect foreign hosts to behave exactly like Japanese. What they do expect from hosts is some indication of conforming to Japanese rules and customs of behaviour (Zimmerman, 1985). For this reason while on holiday in Australia, Japanese tourists expected from Australian hosts the basic gestures which would indicate their positive attitudes toward Japanese tourists. It is worth noting that post-travel scores showed the negative change in the Japanese tourists' perception of shop assistants'

politeness. However, as can be seen in Table 18, p.165, the negative change in the post-travel perception was not significant but close to significant at p<0.05 level. Therefore, it can not be stated definitely that Japanese tourists' expectations in this area were not met and tourists were not satisfied. However, it seems that politeness of shop assistants might be very important to Japanese tourists.

As was previously mentioned most of the Japanese tourists sampled came to Australia on their first visit. While abroad they feel lost and uneasy around foreigners. In order to feel secure, to feel relief from interaction difficulties, relaxed and to enjoy their holiday, most of the Japanese tourists decide to come to Australia in guided groups. Schmidt (1979) argued that guided tours are popular because they offer tourists ready solutions to the problems of what to see, how to get there and how to deal with locals and to remove many of the tourists' interaction difficulties. According to Argyle (1975) tourists can avoid uncomfortable contact with hosts through the help of a tourist guide. Taft (1977) suggested that tourists guides can insulate many travellers from the difficulties of coping with another culture.

Japanese tourists expect tour guides to make their visit to a foreign country easier. They have many expectations in relation to foreign tour guides, particularly to tour guides' qualifications, ability to speak Japanese language, ability to provide tourists with precise information and explanation about visited country,etc.

The study results showed that on arrival Japanese tourists expected _Australian tour guides_ to be informative. However, on departure Japanese tourists were disappointed with the amount of information provided by Australian tour guides. On departure Australian tour guides were perceived by Japanese tourists as significantly less informative than tourists expected before they arrived to Australia (see Table 6, p.54). It is evident that Japanese tourists did not obtain sufficient information from Australian tour guides, for example: about accommodation, shopping opportunities, transportation, etc. It might be any basic information which every tourist requires while on holiday in a foreign country. It appears also that Japanese tourists expected from Australian tour guides more explanation about Australian history and culture. The purposes of visiting Australia by Japanese tourists is the need to discover different culture, to get familiar with different tradition, history, to meet people. It appears that Australian tour guides did not meet Japanese tourists' expectations because they did not provide Japanese tourists with all required information about Australia and its nationals, lifestyle, economy,etc. It looks also that on departure Japanese tourists perceived Australian tour guides as less knowledgeable about Australian history and culture. However, it has to be note that, the negative change in the Japanese tourists' perception of Australian tour guides' knowledge about Australian history and culture was not significant and it can not be stated definitely that Japanese tourists' expectations in this area were not met. Nevertheless, it is evident that the change was very close to significant at level $p < 0.05$ (see Table 19,

p.167) and it seems that Australian tour guides' knowledge about Australian history and culture might be very important to Japanese tourists.

One of the reasons for Japanese tourists' disappointment with the amount of information provided by Australian tour guides could be the cultural determinants which influence Japanese attitudes toward leisure and expectations from hosts. Traditionally, Japanese are very precise and perfect in everything they do, for example: they thoroughly prepare themselves before they make any decision (Zimmerman, 1985). This may be the main reason why the Japanese are so successful in their economy. They also know more about their partners and their markets than their partners know about Japanese (Zimmerman, 1985). It appears that the Japanese might also try to learn something in advance about a foreign country they intend to visit. Before coming to Australia on holiday they might collect some information about the country and its nationals, they might prepare some questions for Australian tour guides to answer and expect detailed explanations. Japanese tourists' expectations in this regard might be very high.

Another reason for Japanese tourists' disappointment with Australian tour guides could be lack of professional training and lack of understanding by Australian tourism industry officials about how vital the issue of providing Japanese tourists with information about the country and its tradition, culture and history by Australians is to Japanese tourists. Considering that most of the Japanese tourists arrive to Australia as members of the tour groups the tour guides role in introducing and presenting the country becomes vital.

It should be noted that 13 Japanese tourists were guided by Japanese tour guides. In this case the tour guides might be Japanese living in Australia or they might be brought by tourists from Japan. While these arrangements have the obvious advantages of overcoming the language barrier, they have the negative side effects of Australia being presented through the eyes of Japanese who might only recently have arrived to Australia themselves. The detailed knowledge of a region might be lacking in the case of someone who had not lived in the area for long and who had to depend on books rather than first hand experience as the source of information. The tour guides, especially when they accompany the tour groups for the length of their stay, become the most important source of information for the Japanese tourists.

It appears that Australia is lacking sufficient number of professional Australian tour guides for Japanese tourists. It also appears that Japanese tourists prefer to be guided by professional Australians (see comments on post-travel questionnaire, p.63,64), probably due to the possibility of obtaining more and better information about Australia and its nationals from Australian guides than from Japanese guides. Unfortunately, tourists guided by Australian tour guides (data about tourists guided by Japanese tour guides is not available due to this study's aims to measure perception of Australian hosts) were disappointed because their expectations in the above mentioned area have not been met by Australian tour guides. With this in mind Australia would be well advised to train as many bi-lingual tour guides as possible.

Although some of the Japanese tourists' expectations have not been met, it is worth mentioning positive aspects of service provided by Australian tour guides, eg.: friendliness, politeness, helpfulness, etc. as shown in Table 19, p.166,167.

In regard to <u>service at airports</u> Japanese tourists were disappointed with airport employees' poor Japanese language skills. In Japanese tourists' opinion airport employees spoke worse Japanese language than tourists perceived on arrival (see Table 7, p.56). It appears that the airport staffs' ability to communicate effectively with the Japanese and to give them proper directions and information is also very important to Japanese tourists, particularly in Australia where airport procedures, customs rules, etc. might be different than in Japan and confusing for first time visitors to our country.

It should also be stated that in all other tested areas of service at airport Japanese tourists were not disappointed and their pre-and post-travel perceptions were similar, eg.: friendliness, politeness, helpfulness, information giving role (see Table 20, p.168).

On arrival <u>service in general</u> has been perceived by Japanese tourists as average. On departure Japanese tourists' perceptions changed slightly and they assessed service in Australia a little bit more positively. However, the difference between pre- and post-travel responses was not significant. It suggests that despite of positive change in post-travel perception on departure Japanese tourists still perceived service in Australia as average

(see Table 21, p.169).

In general, Japanese tourists' expectations in regard to service have been met but that does not mean that Japanese tourists were happy and satisfied with service provided by Australian hosts. Japanese are very famous for their top quality service. They are professional in providing very high standards of service. Service is very personal, the customer in Japan is treated very highly and Japanese as guests expect to be treated the same. They recognize standards of service immediately when overseas (Zimmerman, 1985). This was the reason why Japanese tourists complained about service in Australia. They recognized that service in Australia was poor in comparison to Japan. According to Japanese tourists' comments provided on the post-travel questionnaire service in Australia was not good and even very bad (p.64). Tourists complained that Australians did not know how to serve customers (p.64). Tourists did not like service in Australia, they preferred service in Europe (p.64). They called for improvement of service in Australia (p.64).

The comments Japanese tourists provided on the post-travel questionnaire support opinion from newspapers that Japanese tourists are not impressed by Australian standard of service and Australian hosts do not know how to provide services to Japanese in some areas. The Japanese tourists' comments also support Kennedy's findings (1988) that Japanese tourists do not assess service in Australia as very good but between "all right" and "so so".

However, according to the study results it can not be stated definitely that all Japanese tourists' expectations from service provided by Australian hosts are not met. In general, Japanese tourists' expectations from service provided by Australian hosts are met. However, there are several areas of service with which Japanese tourists are not impressed, their expectations are not met, moreover, Japanese tourists are disappointed in these areas.

The satisfaction level on arrival was perceived by Japanese tourists as low and on departure even lower (see Table 22, p.170). Although the difference between pre- and post-travel perceptions was not significant, the post-travel comments indicate that Japanese tourists were even less satisfied with Australian hosts than they perceived on arrival. Japanese tourists expressed the view in their post-travel comments that they changed their perception of Australian hosts since they have arrived to Australia "but not for better" (p.65). According to the post-travel responses tourists did not want to come back to Australia because service was not appropriate, not caring and there were too many strikes (p.64,65).

The comments on the post-travel questionnaire reflect statements in anecdotal information that Japanese tourists go back home every year dissatisfied with Australian service and their response to poor service could mean refusal to return to Australia.

The results of this study support some of the study's assumptions. In about one third of the tested areas Japanese tourists were not satisfied with their Australian hosts and service provided. As was stated before less respondents (one third) said they would come back to Australia with higher certainty when thinking about service, more respondents (nearly half) said they would come back but with lower certainty (see Table 14, p.160).

The results of this study support some of the findings mentioned already in the literature review. According to Mill and Morrison (1985) tourists' satisfaction depends on their expectations. The expectations higher than tourists experience influence tourists' dissatisfaction. Japanese tourists' expectations were higher than their experiences in many instances. It was the reason why they were dissatisfied. According to Pearce (1982) the social interaction between tourist and host is very important. Hoteliers, salesmen and custom officials contribute to the overall impression tourists have about hosts. Tourists' satisfaction depends also on expectations from contacts with tour guides, hotel staff, airport staff, waiting staff, shop assistants, etc. The Japanese tourists' dissatisfaction with Australian hosts inability to provide tourists with certain standard of service supported Pearce's statement that feelings of discontent, inappropriate hosts behaviour,etc. can influence tourists' dissatisfaction. The study also assisted Pearce's (1980) efforts to answer the question of whether there is a link between tourists' satisfaction

and their pre-and post-travel perceptions. On arrival the pre-travel scores were higher suggesting that Japanese tourists perceived hosts and services more positive than on departure. Although, the pre-travel perceptions had impact on post-travel perceptions, the more favourable pre-travel perceptions did not guarantee Japanese tourists' satisfaction. Dissatisfaction with the service provided had a more powerful influence on the post-travel evaluation scores. The post-travel scores were lower (see tables with the areas of significant differences between Japanese tourists pre- and post-travel perceptions, p.42,45,48,51,54,56). The dissatisfaction of Japanese tourists occurred because their expectations had not been met. The study confirmed Lewis' opinion (1983) that dissatisfaction results from unconfirmed expectations. The study results also suggest that Japanese tourists' dissatisfaction with Australian hosts and service provided convinced many tourists not to come back to Australia. The study proved Lewis' statement (1983) that the attitudes of hotel staff can influence tourists' decisions to return or not to return and Sutton's view (1967) that if hosts are not competent in providing services the tourist-host contact may eventuate in negative results. The findings of this study support Pizam's (1978) statement that the evaluation of satisfaction is an important tool in determining the number of return visits.

The positive results of the relationship between expectations and satisfaction findings of this study support the Australian Tourist Commission (ATC, 1990) findings that Australia meets most of the Japanese tourists' expectations and Japanese tourists are

satisfied with Australian service.

However, both studies (reseracher's and ATC) showed that the satisfaction level with the amount of information available for Japanese tourists while in Australia was relatively low. Furthermore, the Japanese tourists would prefer to be served by Australian born hosts speaking Japanese language in order to experience the Australian culture. Most of the Japanese tourists wanted to interact with Australians while on holiday in our country. According to the present study many Japanese tourists mentioned in their post-travel comments that they wished to interact with Australian hosts. The pre-travel questionnaire results showed that on arrival 51.6% of respondents regarded the interaction with Australian hosts as not important and only 3.2% regarded as very important (see Table 8, p.154). The post-travel questionnaire results showed that Japanese tourists changed their perception while holidaying in Australia and on departure only 5.4% of the respondents regarded the interaction with Australian hosts as not important, and 48.4% of Japanese regarded this interaction as very important (see Table 11, p.157). Japanese tourists changed their perception because they probably realized that while on holiday in a foreign country their satisfaction with their holiday does not only depend on tourist facilities but also on social contact with eg.: the organizers of their trips, tour guides, hotel staff, waiting staff and all the other people who take care of them while they are away from home. Japanese tourists probably realized that foreign hosts might influence the way they feel about the visited country and their satisfaction from their holiday might depend on their feelings. Hosts were

part of their holiday and hosts could make them feel happy and welcome as well as unhappy and disappointed depending on the hosts' attitudes towards the tourists. So, Japanese tourists' enjoyment from their holiday in Australia and their overall satisfaction with their holiday might depend on the way they were treated by hosts and how they perceived hosts. Pearce (1980) stated that positive perception of hosts and liking of the people encountered while on holiday may influence the choice of travel destination and affect tourists' satisfaction.

Additionally, according to the comments on the pre- and post-travel questionnaire in this study it was difficult for Japanese tourists to mix and interact with those who did not speak Japanese language. Japanese tourists wished to meet more Australians speaking good Japanese language. Therefore, it seems that knowledge of Japanese language by Australian hosts is one of the important issues to Japanese tourists. It should be remembered that polite and uncomplaining Japanese traditionally try to save face and not embarrass foreign hosts by expressing directly some of their negative perceptions or wishes which hosts are not able to fulfil. It should also be remembered that the real understanding of Japanese is the ability to recognize not only what is said by Japanese but what is meant. The distinction between honne (true meaning) and tatamae (what must be said) is an important skill when dealing with Japanese and trying to assess their perceptions.

In summary, the findings of the study showed that Japanese tourists are satisfied with service in Australia. Only in some areas of service Australian hosts do not meet Japanese tourists' expectations. The assumptions that Japanese tourists' pre-travel perceptions of Australian hosts and service provided are more favourable than their post-travel perceptions are supported by the study's findings only in some areas of service. In general, Australia does not have many difficulties in providing good service to Japanese tourists. This has positive impact on the way Japanese feel about Australian hosts and Australia as a tourist destination.

Chapter 6

CRITICAL OVERVIEW OF THE STUDY

6.1   Problems in the Assessment of the Instrument

This study has several practical limitations.

The pre-arranged tours limited the number of places visited by the Japanese tourists. Tourists were surveyed only in Melbourne. The data obviously represent the Japanese tourists' perceptions of their Australian hosts from Melbourne. Japanese tourists visiting other Australian cities might have different perceptions of their Australian hosts. Additionally, although in many areas there were similar responses on arrival and departure, there are many factors which should also be taken into account before generalizations can be made.

6.1.1   Problems in the Assessment of Reliability

There are some problems which attributed to the respondents' way of answering the questions.

Firstly, although an effort has been made to maintain the essence of the pre-travel questionnaire being closely related to the post-travel questionnaire, the respondents did not have the opportunity to give wider answers. Most of the respondents stated only one rating on each item. Introducing the broadened rating

scale would help to better assess the differences between respondents' pre- and post-travel answers.

Secondly, the same two ratings from pre- and post-travel questionnaires might be interpreted differently. Some ratings, particularly from the pre-travel questionnaire could be based on guessed responses.

Thirdly, respondents could have different attitudes to ratings. Some respondents might feel their answers might embarrass the researcher if they did not give positive responses. The cultural determinants indicate for Japanese the necessity of saving face and avoiding any embarrassment or insult in order to maintain harmony in all relations. Japanese are always careful not to speak "ad hoc" or to do anything without first taking into account all the possible consequences of action (Zimmerman, 1985). Many Japanese are afraid of commiting faux-pas especially in front of foreigners. This might be a reason why some respondents might tend to present a more favourable picture than would be expected. They might feel they protect themselves by positive ratings. On the other hand, some respondents might tend to rate more negatively than would be expected. They might feel they are helping the researcher by giving more negative answers and indicating stronger problems which the respondents face and which they are shy to talk about directly in front of the Australian tourism industry officials or in front of their own tour company's management. So, some respondents might be motivated to present their answers in a more favourable or unfavourable way than is expected. All of these factors could have impact on the uncertainty about the ratings.

In order to match the answers from pre-travel questionnaire with the answers provided in the post-travel questionnaire, the respondents were asked to supply their first name on the last page of each questionnaire. The respondents were free to give any other name if they wished to stay completely incognito. Although the respondents have been reassured about confidentiality of their answers, answers might be influenced by the fear or lack of trust to those who have access to the respondents statements. On the other hand, some respondents might exaggerate the answers to influence quick intervention of the industry officials in case of very negative perceptions or in order to encourage officials to undertake certain activities.

In the case of this study, although the respondents were well informed about the purpose of the survey and it was hoped the respondents were inclined to give trustworthy and adequate responses, no reliability of the questionnaire was established.

6.1.2   Problems in the Assessment of Validity

The aim in the development of the questionnaire was to test if Japanese tourists' perception of Australian hosts and service provided differed on arrival and departure.

Although all questionnaire items could be correctly understood by respondents, it could be questionable if all the items contributed to the total scores and if the questionnaire appeared to be a good tool to test the above mentioned pre- and post-travel perception (for the explanation see p.98).

The ascertainment of psychometric properties of the questionnaire warrants another detailed study and analysis. This is in progress.

6.2   Problems in Utilization of the Instrument

A very important problem is the utilization of a newly developed instrument. The utilization of the instrument depended on the attitudes of the social environment, like in the case of this study, on translators, Japanese tour companies' management, Japanese tour guides and Japanese tourists' attitude to the utilization of the instrument.

A correct translation of a developed instrument into Japanese language required an excellent knowledge of the Japanese language and translator's ability to assess the degree of respondent's comprehension of the translated text. The necessity of taking into account many criteria which influence good translation prolonged the distribution and collection of data. After delivering the first part of the questionnaire to two Japanese tour companies the researcher was notified that the translation was incorrect. The necessity of the revision, inaccessibility of a Japanese word processor, long period of waiting for corrections, accounted for many of the difficulties experienced by the researcher. It has been also found that Japanese were concerned about the shape, length, additional space for comments and general outlay of the questionnaire. The acceptance of the questionnaire by the professional Japanese interpreting agency and Japanese tour companies' management, Japanese tour guides and

Japanese tourists proved the success of the study in relation to translation.

One of the problems carrying some difficulty in the data collection for this study and later utilization of the instrument was the neccessity to obey Japanese formal procedures and to submit introductory letters to Japanese tour operators and Japanese tourists with the complete explanation of the study's aims and purposes (see Appendix B, p.131,132). The acceptance of the letters by Japanese tour companies' management and permission to distribute the questionnaire and the respondents' engagement in the process of answering the questions in order to give thougthful responses, proved to be very helpful.

Another problem in data collection and utilization of the instrument were the difficulties in distributing the questionnaire due to the pilots' strike and the decreased number of Japanese tourists arriving to Australia between September and December 1989. Further, a lack of sufficient time for Japanese tourists during their holiday which could be devoted to answering the questions (Japanese tourists stay in Melbourne usually one or two days) and fear by Japanese tour operators of being a nuisance for their clients and to wasting their clients' precious time which could be used for other activities. However, three Japanese tour companies responded positively to the survey. Although it took four months for them to collect responses from ninety three Japanese tourists, the number of the distributed questionnaires exceeded the researcher's expectations.

It has to be also stated that acceptability of the evaluation of results depended on the attitudes of the Japanese tour operators. The researcher found that the efficiency and effectiveness of services for Japanese tourists and good Japanese tourists-Australian hosts relations were the primary concerns of every Japanese tour companies' management. The opportunity of getting feedback in the future about clients' responses convinced many of the Japanese tour operators to co-operate with the researcher. It also appears that Japanese tour guides have put a lot of effort in to the distribution of the questionnaires which implies their interest in this study and their willingness to co-operate.

There are other shortcomings of the study methodology which have to be acknowledged next to the problems with the assessment of reliability and validity:

- Small sample size (N=93) which could have great influence on bias findings.
- Most of the respondents (90.4%) are under 35 years of age. It means that the study findings apply only to this particular age group. Consequently, the statements which have been made in the study do not apply to visiting Japanese in all age groups.
- More than 60% of the sample indicated their purpose of travel as "other than holiday". Although the purpose of the study was to analyse the satisfaction of the Japanese tourists holidaying in Australia, the study findings apply mostly to Japanese

tourists not holidaying in Australia whose purpose of visiting
Australia could be for health, study, sport, religion,
business, family, meeting and other reasons. Only 34.4% of the
sample indicated their purpose of travel as "holiday".
Data is therefore not typical. Furthermore, the perceptions of
"non-holidaying" and "holidaying" Japanese could differ.
Consequently, the findings are limited.

- Sampling is seasonal. Japanese tourists were surveyed between
September and December 1989. The responses obtained in
different time of the year could be different.

- The study was conducted in a very difficult time - during
pilots' strike. This fact could have a great influence on the
tourists' perceptions of services offered at that time.

- Questionnaires were passed to a limited number of the tour
companies in Melbourne. Therefore, the findings represent the
Japanese perceptions of Australian hosts only in Melbourne.

- The study was a pilot study and the first of this type of
research. Therefore, it is possible that further similar
studies will take into account the above mentioned factors
which influenced the findings.

In short, all the shortcomings of the study methodology, which
have been indicated in this chapter, could have impact on the
uncertainty of the results and limited findings. In general, data
was not typical. The conclusions drawn on the basis of the
limited findings did not allow to make generalizations to the
whole spectrum of visiting Japanese.

A verification of the present study should be provided. The exploration of the aims of this study in terms of expectations and actual perceptions of Japanese tourists' experiences holidaying in Australia is needed. The suggestions for further exploration of the aims of this study are presented in Chapter 7.

Chapter 7

IMPORTANCE OF THE STUDY

and its

CONTRIBUTION TO FURTHER RESEARCH

Despite its shortcomings, this study has several important features.

7.1 Implications for the importance of Japanese tourist market

Great attention has been paid recently to research on the importance of the Japanese tourist market in developing Australia as a tourist destination and determining what can be done to increase Japanese tourists' satisfaction levels from holidaying in Australia and to increase their repeat visits. The increase in Japanese tourist arrivals to Australia contributes to the overall improvement in Australia's economic situation and its social relations with the Japanese. Thus concept of the Japanese tourists' perceptions of their Australian hosts seems to be an important assessment index.

This results of this study support the ATC (1990) opinion that Japanese tourists are very content with their Australian hosts and their level of satisfaction exceeds their expectations.

However, this study also supports the negative opinion referenced in the literature review. It has been found that in some areas of service (15 out of 52) there is a difference between Japanese tourists' perceptions and their satisfaction level from interacting with Australian hosts and service provided. The results of this study indicated what caused Japanese tourists' satisfaction or dissatisfaction while interacting with Australian hosts and explored several problems in depth. This study could give the tourism industry officials an understanding of the Japanese major problems areas arising from interaction with Australian hosts. It might also help to collect necessary information from the tourists unwilling to mention some problem areas which they are too embarrassed or ashamed to indicate directly in front of the Australian tourism industry officials or Japanese tour companies' management. The knowledge of the problem areas in satisfying Japanese tourists' needs could help both Australian and Japanese tourism industry officials to determine which areas are most important to deal with in the first instance and to improve Australian hosts-Japanese tourists contact.

The success of this study lies in presenting the criteria of Japanese tourists' satisfaction and in showing that Japanese tourists overall perceptions of Australian hosts appear to be a composite of several factors. A good impression and reaction to Australian hosts is related to Japanese tourists' satisfaction with their perception of Australian hosts e.g.: friendliness, helpfulness, politeness,etc. These findings suggest that Japanese tourists are sensitive to such measures and tourism industry

officials should consider them in every strategy aimed at increasing the number of Japanese tourist arrivals to Australia. In particular, more professional service, more informative staff, speaking better Japanese language, could aim at showing concern for our tourists and demonstrating high appreciation of Japanese guests.

7.2 Contribution to further research

Another important feature of this study is that researchers could utilize the survey in other studies designed to address similar problems among other tourists. The instrument developed for measuring Japanese tourists' pre- and post-travel perception could be applied in future research for evaluation of other international travel markets generating tourists to Australia. This survey could help in increasing our understanding of such important issues as professionalism of service, competence in work, good manners,etc. and effects of the interpersonal tourist-host relations on the tourists' satisfaction level and their repeat visits. The survey could help to determine what intervention methods work best with tourists. It could provide feedback for the tour companies' management as to the effectiveness of their work. Furthermore, the repeated utilization of the survey would produce broadened information which could be used to improve the services offered, to make these services more responsive to tourists' needs and to different market segments the particular tour companies serve.

Tourism industry officials wishing to cater for the Japanese market must use appropriate strategies which appeal to this specific market. This study has examined the perceptions of Japanese tourists of their Australian hosts in Melbourne. Further research could explore the perceptions by Japanese tourists of their Australian hosts in other Australian cities, and comparative analysis may show differences among tourists' perceptions visiting various states, and regions of Australia. Further research could explore Japanese tourists' perceptions of other nationalities' hosts and analysis may show differences among Japanese tourists' perceptions of Australian hosts and other foreign hosts. Further research may examine the methodology of satisfying Japanese tourists' needs and requirements. The areas tested may be expanded, scoring method may be broadened, structure can be revised and applied according to seasonality of traffic flows and current market needs. Questions related to efficiency and effectiveness of services can be added.

It is worthy of note that Pearce (1988) recommended some techniques for improvement of further research in the tourism industry and these techniques could be very appropriate in this area, for example: improvement of techniques of data collection, appraisal methods, ratings, coding, sorting questions, providing specific test for personality, introducing short post-experience questions, behavioural observation techniques (hidden cameras, microphones), monitoring tourists behaviour over time, use of computers for interview,etc. Pearce (1988) suggested the introduction of multivariate analysis, greater use of visual aids, charts, pictograms, carrying out multiple regression with

tourists' satisfaction as the dependent variable, use of questions providing respondents with the chance of indicating their negative views, better methods of explanation and interpretation of data by using a more sophisticated cross-tabulation.

This study has developed methodology which may be useful to other researchers and has provided some suggestions for improving strategy attempting to capture the Japanese tourist dollar. This study may be insightful for marketing and advertising purposes. By considering the problems faced by the Japanese tourists, Australian tourism industry officials wishing to promote Australia as a tourist destination for Japanese tourists could emphasize the combination of elements required by Japanese tourists in developing positive interpersonal relations with hosts.

From this analysis it can be concluded that there is still much to do if Australia is to increase in its attractiveness as a tourist destination. Efforts can not be directed only to promotion of tourist facilities and natural resources. These efforts must be supplemented with new efforts to address the positive elements in the social contact with Australian hosts. There is nothing more important for Japanese than maintaining good human relations (ningen kankei). These relations are far more important to Japanese than any other aspect of their life (Zimmerman, 1985). These relations have sociological and psychological implications. There is also nothing more important for Australian hosts than learning how to develop good human relations with Japanese tourists. In this way Australia can

achieve international travel potential in this highly competitive field.

7.3 Recommendations

In today's competitive market, no business can survive without satisfied customers and no country can be regarded as a successful tourist destination without satisfied tourists. Unhappy tourists usually do not come back to destination and very often share their own negative experiences with their friends, relatives,etc. If we want our Japanese tourists to come back we should be fully committed to service superiority and concerned with aspects that these tourists think are not right. We should be willing to admit errors, react immediately when problems occur and take corrective steps to solve them. Tourists' reactions to hosts are usually reflections of hosts' attitudes to tourists. Hosts should be open to tourists. Talking about service is not enough. Success lies in focusing on the customer. Professionalism, competence, concern, politeness, helpfulness, quality of service,etc. are the most important values for every tourist. The tourists' right is to expect excellence and the hosts' duty is to provide it. No one nationality can be blamed for preferring excellent services in hotels, shops, restaurants, airports; for preferring well mannered, polite staff, speaking foreign languages and staff that can be relied upon. No tourist can be blamed for preferring to be welcome, to feel happy, relaxed and comfortable. There is no such thing as uniqueness of Japanese tourists or their "special" requirements. American,

European, Japanese, Australian tourists are similar and they have the same basic needs which should be fulfilled by their hosts without hesitation.

Success depends on hosts. If hosts are able to understand the basic needs of all tourists, guarantee quality of product and far more important quality of human relations between hosts and tourists and superior service, they will continue to attract tourists to particular regions. Human relations between hosts and tourists build on loyalty, awareness of mutual culture and customs develop relations in which tourists feel accepted by hosts. Only such relations are the conditions for tourists' satisfaction with their holidays.

According to this study Australian hosts do not seem to respond to all needs of Japanese tourists, despite the industry sources reassurance that Australia meets these expectations (see ATC 1990 findings). It seems that the Australian tourism industry is just coping with the influx of Japanese tourists. The consequence of this may be the decrease in growth rate of Japanese tourist arrivals in 1989. Only under the condition that Japanese tourists will be satisfied from interaction with Australian hosts and service provided, can Australia appeal to them as a preferred destination for Japanese holidaymakers. Excellent tourist facilities in Australia will not replace Australian hosts good human relations with Japanese tourists which it seems are far more important for the Japanese than any other aspect of their life. This statement is supported by the inability of Australian hosts to provide competent service, which is full of concern about Japanese tourists' needs. The pilots'

strike drew away many Japanese tourists from excellent Australian tourist facilities and pushed the Japanese to other tourist destinations which might offer not only the same fine hotels, restaurants and beautiful nature but also professional service, full of understanding and care.

According to the findings of this study, if Australia wants Japanese tourists to come back it should fully commit itself to developing and maintaining positive Australian hosts-Japanese tourists relations and improving service provided.

The appreciation of Japanese behaviour, attitudes and expectations will enlarge Australian hosts ability to successfully meet tourists demands. The creation of the positive and favourable image and perception of the Australian hosts and quality of service will influence the way Japanese tourists perceive Australia as a holiday destination. Australia can ensure that even the economic and other benefits of Japanese tourism in Australia are maximised and future growth in Japanese tourist arrivals to Australia will continue. The danger only lies in not satisfying Japanese demand and expectations quickly enough and in losing Japanese tourists to other destinations. Australia's wildlife, vastness,etc. may not be enough in the future for the demanding Japanese market. Japanese become influenced by the Western style of life and Japanese tourists want to enhance their understanding of different life styles and culture. They want to interact with other people in a way they had never been able to do in the past. It is important to avoid their having negative experiences and disappointments and not to destroy the aspects which Japanese consider as the most important and find most

attractive while visiting Australia, for example: culture, lifestyle, friendlines,etc.

On the basis of the present study findings and keeping in mind the shortcomings of the study methodology, indicated in Chapter 6, the researcher of this study suggests some recommendations to gain a good reputation for Australian hosts, improve Japanese tourists' perception of Australian quality of service and maintain good relations between Australian hosts and Japanese tourists:

1. Speak Japanese language wherever possible when dealing or serving Japanese tourists.

2. Provide very professional service in hotels. Be competent in your work. Be friendly, informative, helpful and concerned about guests' needs.

3. Participate in customers' needs in food establishments. Anticipate customers' personal needs, do not ignore special requirements.

4. Be informative, helpful, concerned about customers' needs at shops.

5. Introduce Australian tour guides who provide Japanese tourists with all required information about anything what can be of their interest.

6. Provide only top quality service. Japanese are experts in service provision.

7.4   Conclusion

In summary, the researcher's data did not support the assumptions that Australia does not meet Japanese tourists' expectations in regard to service and Japanese tourists are dissatisfied with the service provided in Australia.

It can be stated that for Japanese tourists accustomed to a high standard of service, the important element in defining what is quality service is the behaviour of the hosts and the way the Japanese guests are treated by them. Japanese tourists were satisfied with the performance of Australian hosts and their service. Only in some areas of service Japanese expectations were mismatched with reality. It can be suggested that some problems in satisfying Japanese needs might derive from partial misunderstanding of certain needs of Japanese tourists.

However, many factors should be taken into account before any generalizations can be made. The shortcomings of the study methodology, which were discussed in Chapter 6, influenced the final results of this study and are acknowledged. Findings are limited. Data is not typical. Therefore, it was recommended that more comprehensive research about Japanese tourists be attempted. It will permit tourism officials to be more precisely informed about Japanese tourists' expectations, be more adequately prepared to meet these expectations, increase the quality of Japanese experiences and maintain or even increase Japanese tourist arrivals to Australia. Only on condition that Australian hosts identify precisely Japanese tourists' experiences which are the core to understanding Japanese needs, Australia can attract

more Japanese tourists. Therefore, there is a need for further research which would avoid the present study's shortcomings and that findings could be generalized to the whole spectrum of Japanese market. There is also a need for up to date psychological studies of Japanese tourists in order to identify their needs, demand for travelling to Australia and the trends for the future.

APPENDIX A

Reasons for interest in Japanese tourist market

Ad.1)

The Japanese visitor numbers in Australia have increased remarkably in the recent past. From 1981 till 1988 all major tourists markets to Australia doubled or even tripled the number of tourists to Australia. At the same time the number of Japanese tourist arrivals to Australia increased six times (see Table 1, p.147).

Japan was also the sixth major market of all visitors to Australia in 1981 and in 1983, a fourth major market in 1987 and a second after New Zealand in 1988 and 1989, having overtaken the United States and United Kingdom together with Ireland (see Table 2, p.148).

The number of Japanese tourists to Australia has been growing at a rate of 10% in 1981 over 1980 and more than 22.4% since 1984 over 1983. Annual growth rate in Japanese tourist arrivals to Australia was accelerating with a 48.1% increase in 1987 over 1986 and 63.4% increase in 1988 over 1987 (see Table 3, p.149). The latest ATC data indicates that the annual growth rate in Japanese tourist arrivals to Australia dropped to 62.1% in 1989. According to Australian Tourist Commission long-term forecast, by the late 1990s, Japan and the United States will be the two main sources of tourists to Australia (see Table 4, p.150). The Bureau of Tourism Research forecast in 1987 that the number of Japanese arrivals to Australia will reach levels of around 360.000 by 1990, 600.000 by 1995 and 1 million by the year 2000 (see Table 4, p.150). The forecast of the Bureau of Tourism Research in 1989 showed that the number of Japanese tourist arrivals to Australia will reach even higher levels of around

464.900 by 1990 and around 660.000 by 1995. However, according to the most recent 1990 forecast the ATC wants to attract 770.000 Japanese tourists in 1995 and 1.5 million in the year 2000.

What led to the current increase in Japanese tourist arrivals to Australia that appears to continue into the 1990s and after 2000 ?

Before 1980 the demand for travelling by a Japanese population of 122 million was below the average level in comparison to demand for travelling by the population of other developed countries. Very small leave entitlements (six to ten days), a strong work ethic, loyalty to employers, loyalty to co-workers, refusal to let other employees carry on ones duties, reluctance to take full entitlement to leave and weak leisure ethic limited the size of the Japanese travel market, particularly to distant overseas destinations.

Since 1980 in order to reduce a huge surplus in balance of payment, the Japanese government introduced a new policy regarding travel by Japanese. Since 1987, the Japanese Ministry of Transport (MOT), has endeavoured to promote overseas travel by the Japanese people. The Japanese government announced a new attitude toward leisure suggesting a five day working week, thus giving more time for the Japanese to relax. Such an attitude of the Japanese government increased Japanese domestic and international travelling.

After the liberalization of overseas travel Japanese opened themselves to the international world. During the last couple of

years the society became more modernised and Westernised. Japanese presence overseas led to new investments, development of Japanese trade and financial institutions. This created a need for Japanese services like: restaurants, airlines, travel companies, schools,etc. One of the consequences of greater travelling overseas was willingness of Japanese to learn about foreign countries, their culture, lifestyles, tradition and to study overseas, particularly English language.

The increased spending power and favourable exchange rate due to rising value of the Japanese yen on international financial markets made overseas travel cheap for Japanese tourists, including long haul destinations. Overseas travel is regarded by many Japanese as an important and desirable element in Japanese life.

The Japanese Ministry of Transport (MOT) aim is to increase Japanese outbound travel in the next few years. For the year 1988 Japanese achieved a figure of 8,426,967 in total outbound visitors (see Table 5, p.151). Figures for the year 1989 at the time of writing this thesis were not available. The MOT targets to reach 10 million for 1991 and increase Japanese outbound travel in the next five years to over 10 million. 1988 figures indicate that Australia achieved the highest annual growth (63.4%) in Japanese tourist arrivals in comparison to the other major destinations of the Japanese (see Table 3, p.149). Presently only 7.0% of the total Japanese population travel overseas, only 4.2% of the total Japanese outbound visitors came to Australia in 1988. Taking into account the extremely high annual growth in Japanese tourist arrivals to Australia in 1988,

the figures up to September/October 1989 showing that Australia
maintained a positive growth rate and the MOT's 10 million
program, we can conclude that the Japanese market for Australia
is a highly prosperous one, especially with Japan's own efforts
to promote a steady growth in overseas tourism in the medium to
long terms.

Ad.2)

Australia's natural resources necessary for growth of
tourism can not be offered as a tourism product without capital.
Australia needs to have an access to a large amount of capital to
invest in tourists facilities and needs foreign investments to
fully develop the potential of its tourism industry. These
investments may come mostly from Japan.

Australia also needs Japanese tourists who bring Japanese yen
to Australia. Dollars spent by Japanese tourists multiply in
value in terms of the services and sales they generate. They
providing employment, encouraging investments, increasing
government revenue and stimulating economic growth. Japanese
dollars spent in Australia can reduce Japans foreign exchange
surplus and increase Australias supply of foreign exchange. This
results in a more favourable balance of payment of both
countries. The expansion of Japanese tourism to Australia can
help to improve the economic relationship between both countries.

Ad.3)

According to the International Visitor Survey (1988), Japanese tourists to Australia bring with them between $AUD 1,600 and $AUD 7,000. They spend on average $AUD 1,624 per trip (see Table 6, p.152). They have the highest expenditure per night rounding off at $AUD 184, the average being $AUD 61 (see Table 6, p.152). In a comparatively short period of time (nine nights) they spend the highest amount of money when compared to other tourists to Australia (see Table 6, p.152).

The Japan Market Brief (1988) shows that Japanese spent more on average on food, drinks, domestic airfares and accomodation than any other tourist. Japanese expenditure on shopping in Australia is below what they spend at other travel destinations. Japanese tourists take back home to Japan with them most of their holiday money. This is a loss to both the Australian tourism industry and the economy as a whole. It implies that some of the needs of the Japanese tourists are not satisfied and Australia has difficulties in meeting the Japanese expectations.

Ad.4)

Before discussing Australia's potential for Japanese tourists it is worthwile to mention what Japanese tourists are looking for when going abroad. A literature review shows that Japanese travel overseas to experience Western civilisation (Hendry, 1987; Leiper, 1985, 1987; Zimmerman, 1985). Japanese travel to experience Western style of life: recreational and sport activities such as surfing, golfing,etc. which are very expensive in Japan. They travel to learn about foreign countries

and their traditions. They go sightseeing in large cities and compare famous sites in foreign countries with famous sites in Japan. Japanese are interested in old historical places. They are particularly conscious of museums, art galleries, opera houses, cathedrals, ruins, theatres and art. According to Moeran (1984) the foreign "folks arts" remind Japanese of their heritage. The beauty and value of the foreign famous places reflect Japanese social order and a value system in the same way that Japanese nationally famous places do (Moeran, 1984). Japanese are particularly conscious of all historical places with world famous names. They even attach importance to world famous companies names when buying souvenirs for their friends and relatives.

It can be noticed that Japanese are not only concerned with the physical advantages derived from good weather or nice landscapes. According to Japanese tour guide (1989) Japanese tourists need to experience something. They need to see, hear, discover new people and places. They also need things to do. Instead of appreciating nature and beautiful landscapes, Japanese want to experience the world and its nature spiritually and emotionally. They also need things to buy. And these are the key points for capturing the hearts of Japanese tourists to satisfy them properly.

The idea of going abroad is also a part of the Japanese concern for their position in society. Travelling to distant places gives them more status and prestige. This is particularly important for the middle class and for honeymooners.

According to the past surveys of the Australian Tourist Commission Australia is not in the top ten countries which Japanese tourists had already visited (see Table 5, p.151).

Distance from Japan, short trip duration and transport costs, restricted the Japanese market potential for many long and medium haul destinations. In five years Australia has risen from a relatively unknown destination to being the most desirable tourist destination for Japanese tourists, overtaking Hawaii which for a long time had been the favourite spot for Japanese tourists. Although only 4.2% of the total outbound Japanese tourists visited Australia in 1988 (most of the Japanese tourists chose the United States, Hawaii and Asian countries as a major tourist destination), the annual growth in Japanese tourist arrivals to Australia was the highest when compared with annual growth in Japanese tourist arrivals to their other major tourist destinations (see Table 3, p.149). As was mentioned before from 1981 till 1989 Japanese tourist arrivals to Australia increased six times (see Table 1, p.147). Japan was also a second major market of tourists to Australia in 1988 and 1989 (see Table 2, p.148).

According to the conference proceedings on the Japanese market "The Japanese: Tourist or Guest? The Issues-Key Solutions-Future Prospects" (Sydney, 1988) Japanese when asked to list the names of countries they would like to visit in the future, put Australia as number one followed by Canada, New Zealand, China, Switzerland, US, Spain, Hawaii, France and Greece.

As short-term visitors who typically spend a lot of money, the Japanese are often targets for thieves and robbers. They are particularly sensitive to their needs for security and safety. Some Pacific basin coutries seem to gain a bad reputation among Japanese. Political terrorism has also scared many Japanese away

from certain destinations. According to the conference proceedings "The Japanese: Tourist or Guest?...." (Sydney, 1988) Japanese tourists' perception of Australia as safe and secure put it in the second place, following Hawaii and Switzerland. Except for the need for safety and security where public peace is maintained, Japanese regard sanitary conditions as a significant factor influencing their arrival to Australia. Japanese regard hotel facilities as critical for their arrival to Australia. Australia also ranks third as the country with impressions of friendliness, following Hawaii and the United States. Scenic beauty is a main attraction and the perception of Australia puts it also in the third place after Switzerland and Canada.

In the area of cultural or historical impression, Australia ranks as the ninth. It also appears that Australia has not been perceived as a destination offering enjoyable shopping opportunities, as it does not appear in the ten top countries in this context.

In short, according to the conference proceedings "The Japanese: Tourist or Guest?..." (Sydney, 1988) Australia is being perceived by Japanese tourists as a country with friendly people, with natural beauty, where one may travel in safety, but with not much historical background, offering limited shopping opportunities. Australia is not the only fashionable destination. The interests of tourists are not concentrated on one spot and one attraction, but are stretched along the whole country. Australia does have everything that is the best in the world and that is of importance to the Japanese tourists i.e.:

a) contact with nature and beautiful scenery, b) local features and everyday life, c) public peace, security, safety, d) hygiene and hotel facilities. The points where Australia faces stronger competition are culture, shopping and service. Australia does not have a cultural heritage in terms of a long history. It faces competition from Europe in the mind of the Japanese tourists on the cultural aspects. Shopping in terms of providing goods at cheaper prices than anywhere else may also be difficult for Australia. Although high prices seem to be of less importance to the Japanese than to other tourists, Japanese tourists demand quality and professional service which Australia is still not able to provide on the same scale as Europe.

Furthermore, there is nothing to stop the rapid expansion of international travel by Japanese in the next few years. Although international travel from Japan is still in the early stages of development when compared to travel from similarly affluent nations (in 1987 61 million Germans made 22 million trips, 56 million Britons made 27 million trips and only 6.8 million overseas trips were made by Japanese nation of 122 million; Australian Tourist Commission, 1988), Japanese achieved a figure of 8,426,967 in total outbound visitors for the year 1988. The figure for 1988 shows an increase of 1.6 million travellers (23.4%) over 1987 (see Table 5, p.151). To reach the 10 million target for 1991 outbound travel needs to further increase. All the above figures show that Japanese outbound travel is expanding rapidly and Australia has great potential to attract even more Japanese tourists than it is currently doing.

Australia seems to have not only great potential as the desirable tourist destination for the Japanese market, but also high prospects of success, especially with Japan's own efforts to promote overseas tourism. There has been a general "Australia" popularity boom in Japan over the past years. This boom has been recognised by both countries. One aspect of this has been widespread publicity of Australia's wildlife, flora and fauna and the Australian way of life. On the other hand, the Australian Tourist Commission, State and Territory offices, and the industry itself have been active and aggressive in marketing Australia as a tourist destination for Japanese. Hotel accommodation capacity has been upgraded and is still growing. Tourist facilities have been upgraded and are also still upgrading. Air capacity has been improved much thanks to Qantas, Japan Airlines and All Nippon Airways. More gateway cities have been established in Australia. More Japanese airports provided departures to Australia. The Australia Ministry of Education started a program for Japanese language to the people in the tourism industry. Industry sources in Japan and Australia are confident of several more years of high growth in Japanese tourist arrivals to Australia. The growth appears to be mostly depended on the ability of Australia to provide a diverse range of tourism product, appeal to the range of needs of the Japanese market, an effective pricing strategy and heavy marketing of Australia in the Japanese industry.

Ad.5)

According to Japanese tour guide (1989) in spite of the confidence of the Australian Tourist Commission and other industry sources, some of the Japanese tour operators and tour guides are in doubt about the boom in Japanese tourist arrivals to Australia in the future. Australia's potential in the tourism industry is not being used optimally. Japanese tourists encounter difficulties in areas such as service and human relations in tourist-host contact. There are many other countries competing for the Japanese dollars, offering better service and showing better attitudes to their customers. To get its share Australia must overcome these difficulties.

Australia seems to fail to recognize and understand the specific nature of Japanese tourists, their character, cultural differences, customs, tradition and behaviours that have a great impact on travel decisions. Deficiencies in interpersonal skills, service, values and attitudes oriented to the Japanese market result in customer dissatisfaction. About 40% of all Japanese tourists surveyed in the 1984 Japanese International Survey indicated they prefer "to go elsewhere" (see Table 7, p.153). 20% of tourists indicated that Australia was too expensive. Given a strong swing in Japans favour of yen/dollar exchange rate between 1984 and 1988, this could not be an issue. 25.8% of tourists gave other reasons for not revisiting Australia. These reasons might not be explained by Japanese tourists directly as they traditionally never complain, trying to save face and avoid embarrassment to foreign hosts. The result of such behaviour is that Australian tourism industry suppliers believe that Japanese

tourists do not have any negative impressions of Australia and they unconditionally predict further growth in Japanese tourist arrivals to Australia.

There are a number of cultural factors which can influence the decrease in Japanese travel growth to Australia during the next decade. There is a wide cultural gap between Japanese people and Westerners that many Westerners are not aware of or do not understand. The Westerners usually do not understand the reasons for specific Japanese behaviour. The Japanese often say and do things that seem not logical to Westerners (Zimmerman, 1985). Japanese tradition, values and preferences differ from those of Australians as they have been shaped by a different cultural background. The cultural differences also create communication problems. On the other hand, Japanese who are not familiar with the Australian style of life and behaviour do not understand Australians.

At a 1989 symphosium held in the Gold Coast on the Japanese Market in Australia, it was reported that many Australians do not understand the significance of Japanese tourism in the development of Australia. People in the service sector generally do not display a positive attitude toward providing service, particularly in relation to the Japanese market. Lack of mutual understanding and friendship and very often a strong anti-Japanese movement have devastating effects on tourism and directly on the economy. The Japanese are very conscious of the way they are treated. This includes the Australians who come into direct contact with Japanese on holiday and who are part of Japanese tourists reasons for coming to Australia.

Lack of positive attitudes to service, lack of appreciation of the importance of cultural differences of Japanese tourists, their nature, psychological make-up, needs, expectations, customs and the impact of such a lack of understanding on travel decisions may lead to Japanese tourists' dissatisfaction and to a decrease in the influx of Japanese tourists to Australia.

Ad.6)

The number of Japanese tourists had started to fall off in 1989 causing a crisis of confidence in the future increase in Japanese tourist arrivals to Australia. The Australian Bureau of Statistics figures showed that the growth rate in Japanese tourist arrivals to Australia dropped at the beginning of 1989. According to Japanese tour operator (1989) only 20% of all Japanese tourists, who intended to spend their holiday in Australia in October 1989, decided to come to Australia. Most of the Japanese tourists went to other countries to spend their holiday. Present findings by the Japan Travel Bureau showed that Europe has overtaken Australia as the preferred honeymoon destination of Japanese newlyweds (Walker, 1989).

Since September/October 1989 Australia has had a problem with airline disruptions. It gained a reputation as a difficult country in which to move around. Japanese tourists changed their preferences as to travel destination and went elsewhere. According to the manageress of one of the Japanese travel companies in Melbourne in October 1989 Australia was placed as the last country which Japanese tourists would like to visit. The figures revealed by the media showed that more than half the

tourism projects operating in Australia by 1990 did not meet their projected revenues. Hotels in many parts of Australia experienced lower than planned occupancy rates, especially on the Gold Coast (Walker, 1989). This is a loss for Australian tourism industry as well for the whole economy. Once again it implies that needs of Japanese tourists are not satsfied and Australia has difficulties in meeting their standard of expectations. Although Australia offers excellent facilities, beautiful nature, interesting wildlife and vastness which is admired by Japanese tourists, and it puts huge efforts into promoting itself as tourist destination to Japanese, it is not able to sustain continuous growth in Japanese tourist arrivals.

In short, Japanese tourist arrivals to Australia mostly depend on tourists' satisfaction from their holiday and their experience. Good holidays and tourists satisfaction do not depend only on tourist facilities, product and beautiful nature, but on how tourists feel. Hosts are part of tourists' holidays as they can influence tourists' satisfaction by maintaining good host-tourist relations, developing friendship, understanding tourists' needs, providing high standard of service, appreciating tourists' culture, showing interest in tourists' everyday life,etc. According to the conference proceedings "The Japanese: Tourist or Guest?....." (Sydney, 1988) those are basic needs of all tourists. It is the tourists' right to expect them and hosts' duties to provided them.

Ad.7)

It seems that Australia's ignorance of the importance of the Japanese market to the Australian economy led to negative attitudes toward Japanese tourists, an unprofessional approach, a lack of communication, insensitivity to the Japanese needs, a lack of understanding of their mentality and Australian complacency. While Japanese tourists love Australian nature, beaches, outback life and safe cities, they complain at home that the Australian tourism industry is not doing everything well (McArthur 1988; Kennedy, 1988). One of the presidents of Tokyo Hotels International said that there are fine hotels, restaurants and facilities in Australia, just as there are in other countries (McGee, 1988a). However, thousands of Japanese holidaymakers are going home every year complaining that they have not been able to satisfy their expectations, not being impressed by Australian standards of product and service (McArthur, 1988). They do not accept rudeness, lack of communication, bad manners, laziness, inefficiency and an unprofessional approach (Kennedy, 1988).

Japanese form their opinions of the place from the people who serve them and the way they are treated. They go home and tell their friends of their impressions. If Australia wants to avoid the experience of Canada, which the Japanese suddenly stopped visiting, the industry has to do its best to meet the expectations of the market. According to Japanese tour guide (1989) it is time for Australians to change their attitudes to tourism in particular, by becoming more welcoming and professional, especially those Australians with whom Japanese come into contact while on holiday.

Ad.8)

Learning some basic values and principles of life, rules of Japanese etiquette, real understanding of the nature of Japanese, trying to comprehend their culture, customs, learn their language can effectively faciliate communication with Japanese. Australia should try its best to gain tourists' satisfaction and win their appreciation. Japanese are too important to be ignored: they are Australia's partners, competitors, employers and guests.

Understanding the Japanese and analyzing their nature when dealing with them is critical. The mistake of not satisfying their needs and thereby decreasing Japanese tourist arrivals to Australia can be avoided if Australia remains aware of its own deficiencies.

Understanding the expectations and needs of Japanese tourists requires special study. Being aware of the specific nature of Japanese tourists would help the Australian tourism indutry to understand its tourists, predict their behaviour and make more realistic plans for the future. One of the ways to secure a further long-term growth of Japanese tourists to Australia is a need to recognize Japanese tourists' psychological make-up in handling their expectations and requirements. Even the excellent quality of product, high standard of accommodation, beautiful landscapes and huge marketing efforts proved to be insufficient to keep Japanese tourists coming to Australia. According to Japanese tour guide (1989) Japanese want more than just bed and shopping. They also want something they can not pay for: getting to know people, talking to them and authentic interpersonal experiences with hosts not based on exploitative, commercial

attitudes of hosts.

The provision of psychological comfort can be very important in satisfying Japanese needs. The poor relationship between Australian hosts and Japanese tourists deriving from difficulties of mutual understanding, and lack of understanding of the importance of socio-cultural and psychological factors, caused the failure to satisfy Japanese tourists and also influenced the decrease in their arrivals to Australia. Japanese willingness to come and visit Australia will depend on impressions we create on Japanese tourists and the human interaction with Australian hosts with a positive attitude toward Japanese and the way Japanese tourists are treated as people. Japanese satisfaction can be enhanced by Australia's appreciation of Japanese culture and understanding of Japanese psyche and needs.

These specific aspects of the Japanese tourists' needs are explored in the main body of this study.

APPENDIX B

Letters and Instruments

Footscray Institute of Technology

Ballarat Road, Footscray. P.O. Box 64, Footscray, Victoria, Australia 3011.
Telex:Fitlex AA36596. Facsimile:(03) 689 4069. Telephone:(03) 688 4200

Director
I.M. Herrman

Deputy Director
P.E. Clark

FACULTY OF BUSINESS
Facsimile: (03) 688 4804

DEPARTMENT OF HOSPITALITY AND TOURISM MANAGEMENT

Dear Sir/Madam,

To assist the Australian tourism industry in providing the best possible service for Japanese tourists and in developing the best possible relationship between Japanese guests and Australian hosts, Ivetta Langowoj who is currently teaching in the Hospitality and Tourism Management Department at Footscray Institute of Technology, is conducting a research project to analyse problems and prospects in satisfying the needs and special requirements of Japanese guests in Australia.

She has developed a short questionnaire to assess the perceptions by Japanese tourists of their hosts. The questionnaire is presented in the Japanese language. It takes about 10 minutes to complete. The collected information will be kept strictly confidential.

We are asking if you would kindly give your cooperation in the preparation of this project.

Ivetta's masters project will be a very valuable source of information and will provide important guidelines for the Australian tourism industry. It will make the Australian hosts more aware of the basic values and principles of the Japanese life and tourists expectations. It will enable the Australian tourism industry to respond better to Japanese guests requirements, in terms of service and human relations.

Once completed, the project findings will be available to you on request.

The project is supervised by Dr Robert Waryszak from the Hospitality and Tourism Management Department at F.I.T.

Yours sincerely,

LINDA ROBERTS
Acting Head, Department of
Hospitality & Tourism Management

IVETTA LANGOWOJ
Research Fellow
Dept. Hospitality & Tourism
Management

DR. ROBERT WARYSZAK
Project supervisor,
Lecturer, Organisational Psychology
Dept. Hospitality & Tourism Management

JAPANESE TOURIST SURVEY

Dear Tourist,

To assist the Australian tourist industry in providing the best possible service for Japanese tourists, and in developing the best possible relationship between Japanese guests and Australian hosts, I would appreciate you taking a few minutes to complete this questionnaire.

Your answers are strictly confidential.

Please hand your answers to your tour guide.

IVETTA LANGOWOJ
Research Fellow
Footscray Institute of Technology
Faculty of Business
Hospitality and Tourism Management Dept.
Ballarat Road,
FOOTSCRAY, 3011, Telephone (03) 688 4572

<u>JAPANESE TOURIST SURVEY</u> - first questionnaire

Dear Tourist,

I am pleased to welcome you to Australia.

To assist the Australian tourist industry in providing the best possible service
for Japanese tourists, and in developing the best possible relationship between
Japanese guests and Australian hosts, I would appreciate you taking a few minutes
to complete this questionnaire.

Your answers are strictly confidential.

Please hand your answers to your tour guide.

Have an enjoyable holiday.

IVETTA LANGOWOJ
<u>Research Fellow</u>
Footscray Institute of Technology
Faculty of Business
Hospitality and Tourism Management Dept.
Ballarat Road,
FOOTSCRAY, 3011, Telephone (03) 688 4572

Please answer each question; you may select an answer from those suggested by
ticking the box, or write in you own answer underneath.

1. <u>Your age</u>:   under 18 years   ☐   35 - 49 years   ☐

                       18 - 24 years   ☐   50 - 64 years   ☐

                       25 - 34 years   ☐   65 and over   ☐

2. <u>Your sex</u>:   Male   ☐   Female   ☐

3. <u>Purpose of travel</u>:

                       holiday   ☐   culture   ☐

                       business   ☐   work   ☐

                       studies   ☐   other (please specify)   ☐

                       visiting friends ☐   _____   ☐

4. <u>Your educational qualifications</u>:

                       primary   ☐   college/technical (2 yrs)   ☐

                       junior high   ☐   university degree/diploma (4yrs)   ☐

                       high school   ☐   post-graduate degree   ☐

5. <u>Your occupational status</u>:

                       engineer-science ☐   unskilled   ☐

                       other profession ☐   service   ☐

                       business   ☐   retired   ☐

                       technical   ☐   student   ☐

                       clerical   ☐   homemaker   ☐

                       other skilled   ☐

6. <u>Have you been to Australia before</u>?

                       Yes   ☐   No   ☐

7. <u>Did you know anything about Australian hosts? (people who will be taking</u>
   <u>care of you during your stay in Australia</u>)

                       know fairly well ☐

                       know little   ☐

                       know nothing   ☐

8. <u>What sources of information about Australian hosts did you use</u>?

                       friends   ☐

                       books/magazines   ☐   travel agent   ☐

                       TV/radio   ☐   other (please specify)   ☐

                                                       _____   ☐

PLEASE TURN OVER ⟩

PLEASE GO TO PAGE 3

9. **In choosing Australia as your holiday destination how important was if for you to consider Australian hosts?**

very important	☐
important	☐
not important	☐

10. **How satisfied do you expect to be with your Australian hosts?**

very satisfied	☐	little satisfied	☐
moderately satisfied	☐	not at all satisfied	☐

11. **Please tick between 1- 5 to indicate what you expect from Australian hosts:**

	minimum 1	2	3	4	maximum 5
professionalism/competence in work	☐	☐	☐	☐	☐
friendliness	☐	☐	☐	☐	☐
honesty	☐	☐	☐	☐	☐
patience	☐	☐	☐	☐	☐
politeness (good manners)	☐	☐	☐	☐	☐
helpfulness	☐	☐	☐	☐	☐
concern about customer	☐	☐	☐	☐	☐
punctuality	☐	☐	☐	☐	☐
knowledge of Japanese language	☐	☐	☐	☐	☐
understanding of Japanese needs	☐	☐	☐	☐	☐
good appearance	☐	☐	☐	☐	☐
humour	☐	☐	☐	☐	☐
formality	☐	☐	☐	☐	☐
financial exploitation	☐	☐	☐	☐	☐
other (please specify)	☐	☐	☐	☐	☐

12. **Do you expect service in hotel to be:**

	minimum 1	2	3	4	maximum 5
professional	☐	☐	☐	☐	☐
friendly	☐	☐	☐	☐	☐
polite/with good manners	☐	☐	☐	☐	☐
informative	☐	☐	☐	☐	☐
helpful	☐	☐	☐	☐	☐
concern about guests needs	☐	☐	☐	☐	☐
speak Japanese language	☐	☐	☐	☐	☐
other (please specify)	☐	☐	☐	☐	☐

PLEASE GO TO PAGE 4

13. **Do you expect service in food establishments to be:**

	minimum 1	2	3	4	maximum 5
professional	☐	☐	☐	☐	☐
friendly	☐	☐	☐	☐	☐
polity/good manners	☐	☐	☐	☐	☐
informative	☐	☐	☐	☐	☐
helpful	☐	☐	☐	☐	☐
participate in customers needs	☐	☐	☐	☐	☐
speak Japanese language	☐	☐	☐	☐	☐
keep customers waiting	☐	☐	☐	☐	☐
other (please specify)	☐	☐	☐	☐	☐

_____

14. **Do you expect service at shops to be:**

	minimum 1	2	3	4	maximum 5
friendly	☐	☐	☐	☐	☐
polite/with good manners	☐	☐	☐	☐	☐
informative	☐	☐	☐	☐	☐
helpful	☐	☐	☐	☐	☐
concerned about customers needs	☐	☐	☐	☐	☐
speak Japanese language	☐	☐	☐	☐	☐
demonstrate wrapping skills	☐	☐	☐	☐	☐
financially exploitative	☐	☐	☐	☐	☐
other (please specify)	☐	☐	☐	☐	☐

_____

15. **Do you expect Australian tour guide to be:**

	minimum 1	2	3	4	maximum 5
highly qualified	☐	☐	☐	☐	☐
friendly	☐	☐	☐	☐	☐
polite/with good manners	☐	☐	☐	☐	☐
informative	☐	☐	☐	☐	☐
helpful	☐	☐	☐	☐	☐
fulfil tourists needs	☐	☐	☐	☐	☐
speak Japanese/be interpreter	☐	☐	☐	☐	☐
problem solver	☐	☐	☐	☐	☐
knowledgeable about Japanese history and culture	☐	☐	☐	☐	☐
knowledgeable about Australian history and culture	☐	☐	☐	☐	☐
other (please specify)					

_____

PLEASE GO TO PAGE 5

16. <u>Do you expect service at airport to be</u>:

	minimum 1	2	3	4	maximum 5
friendly	☐	☐	☐	☐	☐
polite	☐	☐	☐	☐	☐
informative	☐	☐	☐	☐	☐
helpful	☐	☐	☐	☐	☐
speak Japanese language	☐	☐	☐	☐	☐
other (please specify)	☐	☐	☐	☐	☐

_____

17. <u>Do you generally expect service to be</u>:

excellent ☐   fair ☐

good ☐   poor ☐

average ☐

It would be helpful if you supply your first name here in order to match your answers with the answers you will kindly provide at the end of your holiday

_____
Your identification name

THANK YOU VERY MUCH FOR YOUR HELP

<u>JAPANESE TOURIST SURVEY</u> - second questionnaire

Dear Tourist,

To assist the Australian tourist industry in providing the best possible service for Japanese tourists and in developing the best possible relationship between Japanese guests and Australian hosts, I would appreciate you taking a few minutes to complete this questionnaire.

Your answers are strictly confidential

Please hand your answers to your tour guide.

Have an enjoyable departure.

IVETTA LANGOWOJ
<u>Research Fellow</u>
Footscray Institute of Technology
Faculty of Business
Hospitality and Tourism Management Dept.
Ballarat Road,
FOOTSCRAY, 3011, Telephone (03) 688 4572

Please answer each question; you may select an answer from those suggested by ticking the box, or write in your own answer underneath.

1. **How important for you, was the interaction with an Australian host?** **(people who were taking care of you while in Australia)**

very important	☐
important	☐
not important	☐

2. **How satisfied were you with your Australian hosts?**

very satisfied	☐	little satisfied	☐
moderately satisfied	☐	not at all satisfied	☐

3. **Please tick between 1 - 5 to indicate what you think about Australian hosts**

	minimum				maximum
	1	2	3	4	5
professional/competent in work	☐	☐	☐	☐	☐
friendly	☐	☐	☐	☐	☐
honest	☐	☐	☐	☐	☐
patient	☐	☐	☐	☐	☐
polite/with good manners	☐	☐	☐	☐	☐
helpful	☐	☐	☐	☐	☐
concerned about customer(s)	☐	☐	☐	☐	☐
punctual	☐	☐	☐	☐	☐
speak Japanese language	☐	☐	☐	☐	☐
understand Japanese needs	☐	☐	☐	☐	☐
have good appearance	☐	☐	☐	☐	☐
have humour	☐	☐	☐	☐	☐
formal	☐	☐	☐	☐	☐
financially exploitative	☐	☐	☐	☐	☐
other (please specify)	☐	☐	☐	☐	☐

4. **Did you regard service in hotel as:**

	minimum				maximum
	1	2	3	4	5
professional	☐	☐	☐	☐	☐
friendly	☐	☐	☐	☐	☐
polite/with good manners	☐	☐	☐	☐	☐
informative	☐	☐	☐	☐	☐
helpful	☐	☐	☐	☐	☐
concerned about guests needs	☐	☐	☐	☐	☐
speak Japanese language	☐	☐	☐	☐	☐
other (please specify)	☐	☐	☐	☐	☐

5. **Did you regard service in food establishments as:**

	minimum 1	2	3	4	maximum 5
professional	☐	☐	☐	☐	☐
friendly	☐	☐	☐	☐	☐
polite/with good manners	☐	☐	☐	☐	☐
informative	☐	☐	☐	☐	☐
helpful	☐	☐	☐	☐	☐
participate in customers needs	☐	☐	☐	☐	☐
speak Japanese language	☐	☐	☐	☐	☐
keep customers waiting	☐	☐	☐	☐	☐
other (please specify)	☐	☐	☐	☐	☐

6. **Did you regard service at shops as:**

	minimum 1	2	3	4	maximum 5
friendly	☐	☐	☐	☐	☐
polite/with good manners	☐	☐	☐	☐	☐
informative	☐	☐	☐	☐	☐
helpful	☐	☐	☐	☐	☐
concerned about customers needs	☐	☐	☐	☐	☐
speak Japanese language	☐	☐	☐	☐	☐
demonstrate wrapping skills	☐	☐	☐	☐	☐
financially exploitative	☐	☐	☐	☐	☐
other (please specify)	☐	☐	☐	☐	☐

7. **Did you regard Australian tour guide as:**

	minimum 1	2	3	4	maximum 5
highly qualified	☐	☐	☐	☐	☐
friendly	☐	☐	☐	☐	☐
polite/with good manners	☐	☐	☐	☐	☐
informative	☐	☐	☐	☐	☐
helpful	☐	☐	☐	☐	☐
fulfilling tourists needs	☐	☐	☐	☐	☐
speaking Japanese/interpreter	☐	☐	☐	☐	☐
problem solver	☐	☐	☐	☐	☐
knowledgeable about Japanese history and culture	☐	☐	☐	☐	☐
knowledgeable about Australian history and culture	☐	☐	☐	☐	☐
other (please specify)	☐	☐	☐	☐	☐

8. **Did you regard service at airport as:**

minimum   maximum

	1	2	3	4	5
friendly	☐	☐	☐	☐	☐
polite/with good manners	☐	☐	☐	☐	☐
informative	☐	☐	☐	☐	☐
helpful	☐	☐	☐	☐	☐
speaking Japanese language	☐	☐	☐	☐	☐
other (please specify)	☐	☐	☐	☐	☐

_____

9. **Did you regard service in Australia as:**

excellent ☐   fair ☐

good ☐   poor ☐

average ☐

10. **Do you think you might come back to Australia when thinking about service?**
Please tick between 0 - 100

No   Yes

|____|____|____|____|____|____|____|____|____|____|
0   50   100

It would be helpful if you supply your first name here in order to
match your answers with the answers you kindly provided at the
beginning of your holiday

_____
Your identification name

THANK YOU VERY MUCH FOR YOUR HELP. If you would like
to make any comment on the Australian people who were
taking care of you while in Australia, please use the
space above.

APPENDIX C

Supplementary Tables and Figures

List of Tables

Figure

Table 1

INTERNATIONAL TOURIST ARRIVALS TO AUSTRALIA, 1981-1988 ('000)

Country of residence	1981	1982	1983	1984	1985	1986	1987	1988
Japan	53.7	60.4	71.8	87.9	107.6	145.6	215.6	352.3
Asia (exc.Japan)	108.4	122.5	132.7	146.7	163.4	203.9	255.3	308.0
Canada	30.9	32.4	33.0	34.5	40.9	47.0	52.7	66.7
Europe (exc.UK+Irl)	120.2	122.6	115.4	124.0	142.0	164.1	203.2	256.2
New Zealand	284.4	233.3	225.0	234.4	245.3	336.7	427.3	534.3
UK+Ireland	146.0	177.8	152.7	149.6	158.9	183.4	208.7	273.4
U S A	114.0	126.0	140.4	161.3	197.4	247.0	309.0	322.3
Other	79.3	79.8	72.9	76.7	87.2	101.7	113.1	136.1
TOTAL	936.7	954.7	943.9	1,015.1	1,142.6	1,429.4	1,784.9	2,249.3

Source: Australian Tourist Commission, Japan Market Brief,1988
          Bureau of Tourism Research, Statistical Review 1980-1987
          Bureau of Tourism Research, International Visitor Survey,1988

Note 1:   arrivals figures are rounded

Note 2:   according to the latest ATC data the number of Japanese
          tourist arrivals to Australia dropped to 349,500 in 1989.

Table 2

INTERNATIONAL TOURIST ARRIVALS TO AUSTRALIA - MARKET SHARE,
1981-1988 (percent)

Country of residence	1981	1982	1983	1984	1985	1986	1987	1988
Japan	5.7	6.3	7.6	8.7	9.4	10.2	12.1	15.7
Asia (exc.Japan)	11.6	12.8	14.1	14.5	14.3	14.3	14.3	13.7
Canada	3.3	3.4	3.5	3.4	3.6	3.3	3.0	3.0
Europe (exc.UK+Irl)	12.8	12.8	12.2	12.2	12.4	11.5	11.4	11.4
New Zealand	30.4	24.4	23.8	23.1	21.5	23.6	23.9	23.8
UK+Ireland	15.6	18.6	16.2	14.7	13.9	13.0	11.7	12.2
U S A	12.2	13.2	14.9	15.9	17.3	17.3	17.3	14.3
Other	8.4	8.5	7.7	7.5	7.6	6.8	6.3	5.9
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: Australian Tourist Commission, Japan Market Brief, 1988
Bureau of Tourism Research, Statistical Review, 1980-1987
Bureau of Tourism Research, International Visitor Survey,1988

Note: according to the latest ATC data Japan provided 16.8%
of international tourist arrivals to Australia in 1989.

Table 3

ANNUAL GROWTH IN INTERNATIONAL TOURIST ARRIVALS TO AUSTRALIA,
1981-1988 (percent)

Country of residence	1981	1982	1983	1984	1985	1986	1987	1988
Japan	10.0	12.4	18.9	22.4	22.4	35.3	48.1	63.4
Asia (exc.Japan)	20.6	13.0	8.3	10.6	11.3	24.8	25.2	20.6
Canada	8.6	4.8	1.7	4.6	18.6	14.7	12.2	26.6
Europe (exc.UK+Irl)	7.0	2.0	-5.8	7.4	14.5	15.6	23.8	26.1
New Zealand	-7.4	-18.0	-3.5	4.2	4.6	37.3	26.9	25.0
UK+Ireland	11.0	21.8	-14.1	2.0	6.2	15.4	13.8	31.0
U S A	2.3	10.5	11.4	14.9	22.3	25.2	25.1	4.3
Other	0.6	0.6	-8.6	5.1	13.7	18.5	9.5	20.3
TOTAL	3.6	1.9	-1.1	7.5	12.6	25.1	24.9	26.0

Source: Australian Tourist Commission, Japan Market Brief, 1988
        Bureau of Tourism Research, Statistical Review, 1980-1987
        Bureau of Tourism Research, International Visitor Survey,
        1988

Note: according to the latest ATC data annual growth in
        Japanese tourist arrivals to Australia was 62.1% in 1989.

Table 4

PROJECTED INTERNATIONAL TOURIST ARRIVALS TO AUSTRALIA,
1990-2000 ('000)

Country of residence	1990	1995	2000
Japan	360	600	1,000
Asia (exc.Japan)	335	550	900
Canada	80	110	150
Europe (exc.UK+Irl)	260	425	700
New Zealand	350	395	450
UK+Ireland	295	420	600
U S A	445	670	1,000
Other	150	180	200
TOTAL	2,275	3,350	5,000

Source: Australian Tourist Commission projections, 1987

Note: the most recent 1990 forecast shows that the
        number of Japanese tourists to Australia will
        reach level of 770,000 by 1995 and 1.5 million
        by the year 2000.

Table 5

MAJOR TOURIST DESTINATION OF THE JAPANESE MARKET, 1988

Destination	1988	% change 1987
U S A	2,640,000	24.0
Hawaii	1,358,000	17.0
Hong Kong	1,240,470	30.0
Korea	1,106,670	24.0
Taiwan	917,161	14.0
Singapore	682,405	26.0
China	591,926	3.0
Guam	493,543	20.0
Thailand	449,086	31.0
Switzerland	397,751	8.0
Australia	352,300	53.0
Macau	318,759	27.0
Marianas	191,407	26.0
Austria	166,215	2.0
New Zealand	93,789	23.0
New Caledonia	15,955	1.0
TOTAL OUTBOUND JAPANESE	8,426,967	23.0
TOTAL POPULATION	122 million	

Source: Australian Tourist Commission, Background paper
        for Japanese Satisfaction Study, 1989

Table 6

AVERAGE TOURISTS EXPENDITURE IN AUSTRALIA, 1988

Country of residence	Average ($AUD)	Average stay (nights)	Average per night ($AUD)
Japan	1624	9	184
Asia (exc.Japan)	1821	31	59
Canada	2042	39	52
Europe (exc.UK+Irl)	2116	46	46
New Zealand	1434	21	68
UK+Ireland	1746	48	37
U S A	1737	25	71
Germany	2175	41	54
Switzerland	2704	42	64

Source: Bureau of Tourism Research, International Visitor
         Survey, 1988

Table 7

REASONS FOR NOT-REVISITING AUSTRALIA
BY JAPANESE TOURISTS, 1984

Main reason	Holiday %	Business %	Total %
Prefer to go elsewhere	40.0	29.4	37.5
Too expensive overall	20.0	8.8	18.7
Too far away	8.6	5.9	3.1
Too expensive in Australia	2.8	11.8	6.2
Other reasons	25.8	41.2	31.3
TOTAL	100.0	100.0	100.0

Source: Bureau of Tourism Research, International Visitor
         Survey, 1984

Table 8

JAPANESE TOURISTS PRE-TRAVEL PERCEPTION OF THE

IMPORTANCE OF AUSTRALIAN HOSTS IN CHOOSING

AUSTRALIA AS A HOLIDAY DESTINATION   (question 9)

	N=93	%
Very important	3	3.2
Important	42	45.2
Not important	48	51.6

Table 9

JAPANESE TOURISTS PRE- TRAVEL PERCEPTION OF

SATISFACTION WITH AUSTRALIAN HOSTS   (question 10)

	N=93	%
Very satisfied	17	18.3
Moderately satisfied	65	69.6
Little satisfied	10	10.8
Not satisfied	1	1.1

Table 10

JAPANESE TOURISTS PRE-TRAVEL PERCEPTION OF

SERVICE   (question 17)

	N=93	%
excellent	6	6.5
good	37	39.8
average	48	51.6
fair	2	2.2

Table 11

JAPANESE TOURISTS POST-TRAVEL PERCEPTION OF THE
IMPORTANCE OF INTERACTION WITH AUSTRALIAN HOSTS

(question 1)

	N=93	%
Very important	45	48.4
Important	43	46.2
Not important	5	5.4

Table 12

JAPANESE TOURISTS POST-TRAVEL SATISFACTION WITH

AUSTRALIAN HOSTS   (question 2)

	N=93	%
Very satisfied	25	26.9
Moderately satisfied	60	64.5
Little satisfied	7	7.5
Not satisfied	1	1.1

Table 13

JAPANESE TOURISTS POST-TRAVEL PERCEPTION OF

SERVICE   (question 9)

	N=93	%
excellent	3	3.2
good	40	43.0
average	42	45.2
fair	6	6.5
poor	2	2.2

Table 14

JAPANESE TOURISTS POST-TRAVEL PERCEPTION OF

COMING BACK TO AUSTRALIA   (question 10)

Scale	N=93	%
10	3	3.3
20	4	4.3
30	2	2.2
40	1	1.1
50	14	15.1
60	9	9.7
70	11	11.8
80	21	22.6
90	6	6.5
100	22	23.7

Table 15

T-TEST ANALYSIS OF JAPANESE TOURISTS PRE- AND POST-TRAVEL
PERCEPTION OF AUSTRALIAN HOSTS

N=93	X̄	S.D.	T-test @
expect professional	3.9892		
think professional	3.8172	0.1720	N.S.
expect friendly	4.3978		
think friendly	4.2366	0.1613	N.S.
expect honest	4.2581		
think honest	4.0968	0.1613	N.S.
expect patient	3.6123		
think patient	3.7419	-0.1290	N.S.
expect polite	3.9247		
think polite	3.9785	-0.0538	N.S.
expect helpful	4.3656		
think helpful	4.1935	0.1720	N.S.
expect concerned about customer	4.2151		
think concerned about customer	4.0860	0.1290	N.S.

X̄   Pre- and post-travel means
@   Independent t-test with two tailed probability
N.S. Statistically insignificant differences between means

Table 15 (cont'd)

T-TEST ANALYSIS OF JAPANESE TOURISTS PRE-AND POST-TRAVEL

PERCEPTION OF AUSTRALIAN HOSTS

N=93	X̄	S.D.	T-test @
expect punctual	4.0430		
think punctual	3.8817	0.1613	N.S.
expect knowledge of Japanese language	3.5591		
think knowledge of Japanese language	3.2366	0.3226	2.34 *
expect understand Japanese needs	3.8065		
think understand Japanese needs	3.5914	0.2151	N.S.
expect good appearance	3.4409		
think good appearance	3.6559	-0.2151	N.S.
expect humour	4.0860		
think humour	4.0860	0.0000	0.00
expect formal	3.8065		
think formal	3.9355	-0.1290	N.S.
expect exploit financially	3.8065		
think exploit financially	3.7097	0.0968	N.S.

X̄   Pre- and post-travel means
@   Independent t-test with two-tailed probability
N.S.   Statistically insignificant differences between means

* p<0.05   ** p<0.01   *** p<0.001

Table 16

T-TEST ANALYSIS OF JAPANESE TOURISTS PRE-AND POST-TRAVEL

PERCEPTION OF SERVICE IN HOTEL

N=93	$\overline{X}$	S.D.	T-test @
expect professional	4.1413		
think professional	3.8804	0.2609	2.61 **
expect friendly	4.1196		
think friendly	3.8804	0.2391	2.47 *
expect polite	4.1957		
think polite	4.1196	0.0761	N.S.
expect informative	3.8696		
think informative	3.6413	0.2283	2.49 *
expect helpful	4.3587		
think helpful	4.0543	0.3043	2.88 **
expect concerned about guests needs	4.2717		
think concerned about guests needs	4.0109	0.2609	2.44 *
expect speak Japanese language	3.5652		
think speak Japanese language	3.1196	0.4457	3.34 ***

$\overline{X}$ Pre- and post-travel means
@   Independent t-test with two-tailed probability
N.S.   Statistically insignificant differences between means

* p<0.05   ** p<0.01   *** p<0.001

Table 17

T-TEST ANALYSIS OF JAPANESE TOURISTS PRE-AND POST-TRAVEL

PERCEPTION OF SERVICE IN FOOD ESTABLISHMENTS

N=93	$\overline{X}$	S.D.	T-test @
expect professional think professional	3.9785 3.8065	0.1720	N.S.
expect friendly think friendly	3.9570 3.8816	0.0753	N.S.
expect polite think polite	3.9247 3.8817	0.0430	N.S.
expect informative think informative	3.6452 3.4839	0.1613	N.S.
expect helpful think helpful	4.1398 4.0108	0.1290	N.S.
expect participate in customers needs think participate in customers needs	4.2043 3.9032	0.3011	2.88 **
expect speak Japanese language think speak Japanese language	3.4946 3.0215	0.4731	3.61 ***
expect keep customers waiting think keep customers waiting	3.6989 3.4830	0.2151	N.S. (1.92)

$\overline{X}$ Pre- and post-travel means
@   Independent t-test with two-tailed probability
N.S. Statistically insignificant differences between means

* p<0.05   ** p<0.01   *** p<0.001

Table 18

T-TEST ANALYSIS OF JAPANESE TOURISTS PRE-AND POST-TRAVEL

PERCEPTION OF SERVICE AT SHOPS

N=93	$\overline{X}$	S.D.	T-test @
expect friendly think friendly	3.9677 3.8065	0.1613	N.S.
expect polite think polite	3.8387 3.6774	0.1613	N.S. (1.92)
expect informative think informative	3.6667 3.3763	0.2903	3.28 ***
expect helpful think helpful	4.1720 3.8172	0.3548	3.40 ***

expect concerned
    about customers
    needs
think concerned
    about customers
    needs
	3.9785
	
	3.6989
		0.2796	2.63 **

expect knowledge of
    Japanese language
think knowledge of
    Japanese language
	3.4516
	3.1828
		0.2688	2.35 *

expect wrapping
    skills
think wrapping
    skills
	3.2581
	3.0753
		0.1828	N.S.

expect exploit
    financially
think exploit
    financially
	3.5484
	3.4731
		0.0753	N.S.

$\overline{X}$ Pre- and post-travel means
@   Independent t-test with two-tailed probability
N.S. Statistically insignificant differences between means

* p<0.05   ** p<0.01   *** p<0.001

Table 19

T-TEST ANALYSIS OF JAPANESE TOURISTS PRE-AND POST-TRAVEL

PERCEPTION OF AUSTRALIAN TOUR GUIDES

N=80	$\overline{X}$	S.D.	T-test @

----

expect highly			
qualified	3.8987		
think highly			
qualified	3.8987	0.0000	0.00
expect friendly	4.3625		
think friendly	4.2250	0.1375	N.S.
expect polite	4.0625		
think polite	4.0250	0.0375	N.S.
expect informative	4.1500		
think informative	3.9250	0.2250	2.58 *
expect helpful	4.3875		
think helpful	4.2875	0.1000	N.S.
expect fulfil			
tourists needs	4.3375		
think fulfil			
tourists needs	4.2625	0.0750	N.S.

$\overline{X}$ Pre- and post-travel means
@   Independent t-test with two-tailed probability
N.S.   Statistically insignificant differences between means

* $p<0.05$ ** $p<0.01$ *** $p<0.001$

Table 19   (cont'd)

T-TEST ANALYSIS OF JAPANESE TOURISTS PRE-AND POST-TRAVEL
PERCEPTION OF AUSTRALIAN TOUR GUIDES

N=80	$\overline{X}$	S.D.	T-test @
expect knowledge of			
Japanese language	4.2500		
think knowledge of			
Japanese language	4.0875	0.1625	N.S.
expect problem			
solver	4.3000		
think problem			
solver	4.1500	0.1500	N.S.
expect knowledge of			
Japanese history			
and culture	3.3375		
think knowledge of			
Japanese history			
and culture	3.5000	-0.1625	N.S.
expect knowledge of			
Australian history			
and culture	4.1000		
think knowledge of			
Australian history			
and culture	3.9125	0.1875	N.S. (1.99)

$\overline{X}$ Pre- and post-travel means
@   Independent t-test with two-tailed probability
N.S. Statistically insignificant differences between means

Table 20

T-TEST ANALYSIS OF JAPANESE TOURISTS PRE-AND POST-TRAVEL

PERCEPTION OF SERVICE AT AIRPORT

N=93	$\overline{X}$	S.D.	T-test @
expect friendly	3.7391		
think friendly	3.5652	0.1739	N.S.
expect polite	3.6667		
think polite	3.6022	0.0645	N.S.
expect informative	3.6022		
think informative	3.5591	0.0430	N.S.
expect helpful	3.9677		
think helpful	3.7742	0.1935	N.S.
expect knowledge of Japanese language	3.4946		
think knowledge of Japanese language	3.2258	0.2688	2.11 *

$\overline{X}$ Pre- and post-travel means
@   Independent t-test with two-tailed probability
N.S.   Statistically insignificant differences between means

* p<0.05   ** p<0.01   *** p<0.001

Table 21

T-TEST ANALYSIS OF JAPANESE TOURISTS PRE-AND POST-TRAVEL

PERCEPTION OF SERVICE

N=93	$\overline{X}$	S.D.	T-test @
expect service	2.5000		
think service	2.5870	-0.0870	N.S.

$\overline{X}$ Pre- and post-travel means
@   Independent t-test with two-tailed probability
N.S.   Statistically insignificant differences between means

Table 22

T-TEST ANALYSIS OF JAPANESE TOURISTS PRE-AND POST-TRAVEL

PERCEPTION OF SATISFACTION WITH AUSTRALIAN HOSTS

N=93	$\overline{X}$	S.D.	T-test @
expect satisfaction	1.9462		
think satisfaction	1.8280	0.1183	N.S. (1.88)

$\overline{X}$ Pre- and post-travel means
@   Independent t-test with two-tailed probability
N.S.   Statistically insignificant differences between means
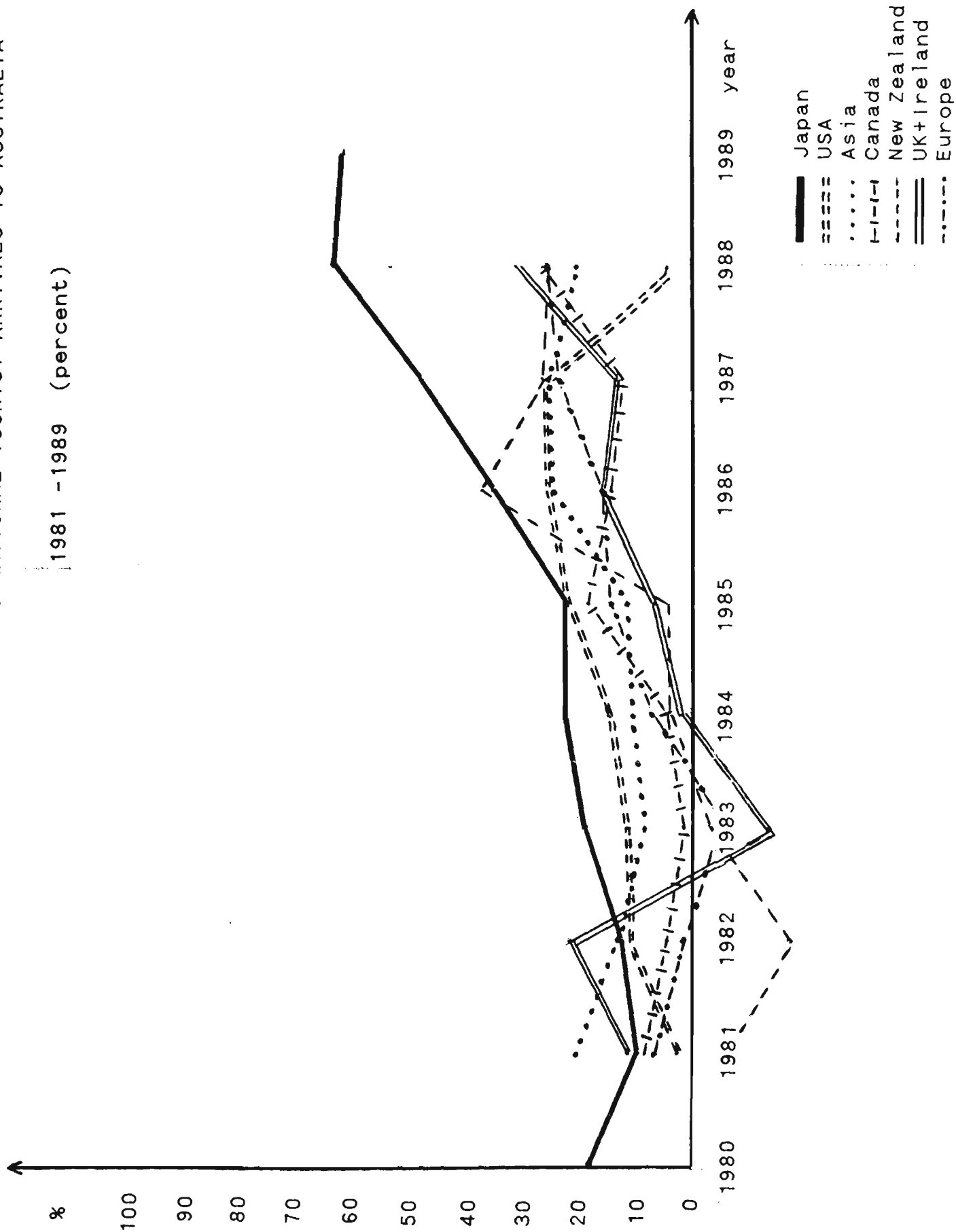
Figure 1: ANNUAL GROWTH IN INTERNATIONAL TOURIST ARRIVALS TO AUSTRALIA

1981 -1989 (percent)

REFERENCES

Alston, R., _Hard facts behind Japans miracle_, The Age,
     April 18, 1988

Argyle, M., _Bodily communication_, London: Methuen, 1975

Australian Financial Review, _Don't say goodbye,_
     just see you later, January 29, 1989, p.14

Australian Financial Review, February 27, 1989

Australia-Japan Economic Institute, _Australia and the_
     Japanese Tourist: Seizing the Opportunity,
     proceedings of a conference held in Sydney,
     February 22, 1985

Australia-Japan Economic Institute, _Understanding the_
     Japanese Traveller: Mentality, Attitude and
     Requirements, proceedings of a conference held in
     Sydney, March 12, 1986

Australia-Japan Economic Institute, _The Japanese Tourist_
     or Guest?: The Issues-Key Solutions-Future Prospects,
     proceedings of a conference held in Sydney,
     March 3, 1988

Australian Tourist Commission, _Market Brief Japan_, 1983

Australian Tourist Commission, _Market Brief Japan_, 1984

Australian Tourist Commission, _Japan Market Brief_, 1988

Australian Tourist Commission, _International Visitor Survey_,
     1985-1988

Australian Tourist Commission, _Statistical Review_,
     1980-1987

Australian Tourist Commission, _Background paper for Japanese_
     Satisfaction Study, 1989

Australian Tourist Commission, _Japanese Holiday Satisfaction_
     Study, Executive Summary Report, Strategic Market Unit,
     Sydney, January, 1990

Baum, Ch., _Hoteliers Cash in on Travel Boom by Japanese_,
     Hotels and Restaurants International, 1989, p.56-58

Bochner, S., Lin, A., and McLeod, B., M., _Cross-Cultural_
     Contact and the Development of an International
     Perspective, Journal of Social Psychology, 1979,
     vol.107, p.29-41

Bureau of Tourism Research, _Statistical Review_,
    1980-1987

Bureau of Tourism Research, _International Visitor Survey_,
    1984, 1988

Cohen, E., _Rethinking the Sociology of Tourism_, Annals
    of Tourism Research, 1979, vol.6, no.1, p.18-35

Consulate General of Japan, _Etiquette in Japan_, 1989

Dann, G., M., S., _Tourist Satisfaction: A highly_
    Complex Variable, Annals of Tourism Research,
    October/December, 1978, vol.5, no.4, p.440-443

Dann, G., M., S., _Tourist Motivation-An Appraisal_,
    Annals of Tourism Research, 1981, vol.8, no.2,
    p.187-212

David, K., H., _Intercultural Adjustment and_
    Applications of Reinforcement Theory to Problems
    of Culture Shock, Hawaii at Hilo: University of CCCTR,
    January 4, 1972

Desatnick, R.,L., _Managing to keep the Customer -_
    - How to achieve and maintain Superior Customer
    Service through the Organization, Jossey-Bass Inc.,
    1st edition, USA, 1987,

Dybka, J., _Overseas Travel to Canada: New Research_
    on the Perception and Preferences of the
    Pleasure Travel Market, Journal of Travel
    Research, 1988, vol.26, no.4, p.12-15

Elias, D., _Learn Japanese, tour trade warned_, The Age,
    September 26, 1987

Fishbein, M., Ajzen, I., _Belief, attitude, intention_
    and behaviour - An Introduction to Theory and
    Research, Addison-Wesly Publishing Company, 1975

Francken, D., A., Van Raaij, W., F., _Satisfaction with_
    Leisure Time Activities, Journal of Leisure
    Research, 1981, vol.13, no.4, p.337-352

Fridgen, D., _Environmental Psychology and Tourism_,
    Annals of Tourism Research, 1984, vol.11,
    no.1, p.19-34

Fukutake, T., _Japanese Society Today_, University of
    Tokyo Press, 2nd edition, Tokyo, 1981,

Furnham, A., *Tourism and Culture Shock*, Annals of
    Tourism Research, 1984, vol.11, no.1, p.41-54

Gartner, W., C., Hunt, J., D., *An Analysis of State
    Image Change over a Twelve Year Period
    (1971-1983)*, Journal of Travel Research, 1987,
    vol.26, no.2, p.15-19

Goodrich, J., N., *A new Approach to Image Analysis
    Through Multidimensional Scaling*, Journal of
    Travel Research, 1987, vol.16, no.3, p.3-7

Gorer, G., *The Concept of National Character*, in Clyde
    Kluckholm and Henry A. Murray: *Personality in
    Nature, Society and Culture*, New York, 1967,
    p.246-259

Hanningan, J., A., *Reservations Cancelled: Consumer
    Complaints in the Tourist Industry*, Annals of
    Tourism Research, 1980, vol.7, no.3, p.366-384

Harrington, T., *Oversights may cost Australia its
    tourist boom*, Weekend Australian, 1988

Hendry, J., *Understanding Japanese Society*, Croom
    Helm Ltd, USA, 1987

Hidetoshi, K., Tadao, U., *The Globalization of
    Japanese*, Japan Echo, special issues, 1989,
    p.61-68

Holloway, Ch., J., *The Guided Tour: A sociological
    Approach*, Annals of Tourism Research, 1981,
    vol.8, no.3, p.377-400

Howard, J., *Japanisation, fears unfounded*, Weekend
    Australia, June 4-5, 1988, p.44

Howell, A., *If Spring is here, Japanese Tourists
    can't be far behind*, Good Weekend, September 5,
    1986

Hunt, J., D., *Image as a Factor in Tourism
    Development*, Journal of Tourism Research, 1975,
    vol.13, no.3, p.1-7

Ishida, E., *Japanese Culture*, Honolulu: University of
    Hawaii Press, 1974

Ishida, T., *Japanese Society*, Random House, New York,
    1971

Joseph, B., _Nationality: Its Nature and Problems_, New
    Haven Conn.: Yale University Press, 1929

Kennedy, S., _Slack staff and service offends_,
    The Bulletin, March 8, 1988

Konitchua Mate - video, Australian Tourist Commission,
    1987

Lebra, W., P., _Japanese Culture and Behaviour_,
    Honolulu: University of Hawaii Press, 1974

Leiper, N., _Why people travel: a causal approach to
    tourism_, Travel and Tourism Division, School of
    Business and Administrative Studies, Sydney
    Technical College, Sydney, 1983

Leiper, N., _The Japanese Travel Market and Its
    Potential for Australian Tourist Destinations_,
    a research study commissioned by Qantas Airways
    Limited, Sydney, 1985

Leiper, N., _The Japanese Travel Market and Its
    Potential for Australian Tourist Destinations_,
    Qantas Airways Ltd, Sydney, 1987

Lethlean, J., _......And a penguin wedding !_, Sunday
    Press, June 5, 1988, p.18

Lewis, R., C., _When Guests Complain_, The Cornell
    Hotel and Restaurant Administration Quarterly,
    August, 1983, vol.24, no.2, p.23-32

Lewis, R., C., _The Market Position - Mapping Guests
    Perceptions of the Hotel Operations_, The Cornell
    Hotel and Restaurant Administration Quarterly,
    1985, vol.26, no.2, p.86-103

Lopez, E., M., _The Effects of Leadership Style on
    Satisfaction Levels of Tour Quality_, Journal
    of Travel Research, 1980, vol.18, no.4, p.20-23

Maddox, N., R., _Measuring Satisfaction with Tourism_,
    Journal of Travel Research, 1985, vol.23, no.3

Martin, W., B., _Defining what quality service is for
    you_, The Cornell Hotel and Restaurant
    Administartion Quarterly, 1986, vol.26, no.4

Maslow, A., H., _A Theory of Human Motivation_,
    Psychological Review, 1943, vol.50, p.370-396

Maurer, T., _Racism devastating on tourism_, Weekend
    Australian, May 28-29, 1988, p.5

Mayo, E., J., *Tourism and the National Parks: A Psychographic and Attitudional Survey*, Journal of Travel Research, 1975, vol.14, no.1, p.14-18

Mayo, E., J., Lance, P., J., *The psychology of Leisure Travel, Effective Marketing and Selling of Travel Services*, Boston CBI Publishing Company, Inc, 1981, p.156-176

McArthur, I. *The Jaded Japanese: reports on why we are not making enough of - and from - the Japanese fascination with Australia*, The Bulletin, March 8, 1988

McGee, Ch., *Boomtime - but can we cope ?*, Weekend Australian, 1988a

McGee, Ch., *Our sun is still rising in Japan*, Weekend Australian, 1988b

McGown, V., Todhunter, M., Chalmers, N., Platt, A., *Japanese for the Tourists Industry - Culture and Communication*, Hospitality Press Pty Ltd, 1st edition, Melbourne, 1988,

McIntosh, R., W. and Sashikant G., *Tourism: Principles, Practices and Philosophies*, Columbus, OH, Grid Inc., 1980

McIntosh, R., W. and Goeldner, Ch., R., *Tourism: Principles, Practices, Philosophies*, 5th edition, USA, 1986

McLellan, R., W. and Foushee K. Dodd, *Negative Images of the United States as Expressed by Tour Operators from other Countries*, Journal of Travel Research, 1983, vol.22, no.1, p.2-5

Mill, R., C. and Morrison, A., M., *The Tourism System - An Introductory Text*, Prentice Hall, USA, 1985

Miller, R., A., *In defence of Japanese*, London: Athlone Press, 1986

Mings, R., *Assesing the Contribution of Tourism to International Understanding*, Journal of Travel Research, 1988, vol.27, no.2, p.33-38

Moeran, B. and Graburn, N., *The language of Japanese Tourism*, Annals of Tourism Research, 1983, vol. 10, no.1, p.93-108

Moeran, B., *Lost innocence*, University of California Press, Berkley, 1984

Morris, S., _Outbound Markets/Market Segment Studies:_
     Japanese Leisure Patterns, Travel and Tourism
     Analyst, 1988, no.5

Morsbach, H., _Aspects of nonverbal communication in_
     Japan, Journal of Nervous and Mental Disease,
     1973, vol.157, p.262-277

Mover, R. and Sugimoto, Y., _Japanese society:_
     Reappraisals and New Directions, Social Analysis-
     special issues, December, 1890, no. 5/6

Mover, R. and Foley, F., _Australian Image of Japan_
     and Japanese, Osutoraria Kenkyu Kiyu, Oteman
     Bulletin for Australian Studies J., December,
     1985, no.2, p.147-168

Munsic, K. _Service with a smile means visitors praise_,
     Weekend Australian, 1988

Narane, C., _Japanese Society_, Berkley: University of
     California Press, 1970

Neustupny, J., V., _Communicating with the Japanese_,
     The Japan Time Ltd, Tokyo, 1st edition, 1987

Neustupny, J., V., _Strategy for fluency in Japanese_,
     The Age, May 23, 1988

O'Connor, P., _Tourism industry needs the right_
     projects and strategies, Financial Review,
     April 20, 1988, p.43

Ostrow, R., _Why we miss out with rich Japanese_,
     Financial Review, February, 1988

Pata Travel News, _What makes Japanese travel agencies_
     rich, January, 1989, p.28-29

Pata Travel News/Asia Pacific, May, 1989

Pearce, P., L., _Tourism's human conflicts towards a_
     more psychological approach, Annals of Tourism
     Research, 1980, vol.7, no.1, p.121-134

Pearce, P., L., _A Favourability - Satisfaction Model_
     of Tourists Evaluations, Journal of Travel
     Research, 1980, vol.19, no.1, p.13-17

Pearce, P., L., _The Social Psychology of Tourist_
     Behaviour, International Series in Experimental
     Social Psychology, University of Oxford, Pergamon
     Press, 1982, vol.3

Pearce, P., L. and Caltabiano, M., L., _Inferring Travel Motivation from Travelers' Experiences_, Journal of Travel Research, 1983, vol.22, no.2, p.16-20

Pearce, P., L. and Moscardo, G., M., _Making sense of tourists complaints_, Tourism Management, 1984, vol.5, no.1, p.20-23

Pearce, P., L. and Moscardo, G., M., _Visitor Evaluation_, Evaluation Review, June, 1985

Pearce, P., L., _The Ulysses Factor: Evaluating Visitors in Tourist Settings_, Springer-Verlag, New York Inc, 1988

Phelps, A., _Holiday Destination Image: The Problem of Assessment - An Example developed in Menorca_, Tourism Management, 1986, vol.7, no.3, p.168-180

Pizam, A., _Dimensions of Tourist Satisfaction with a Destination Area_, Annals of Tourism Research, July/September, 1978, vol.5, no.3, p.314-322

Polunin, I., _Japanese Travel Boom_, Tourism Management, March, 1989, p.4-8

Przeclawski, K., _Humanistic Foundations of Tourism_, Institute of Tourism, Warsaw, Poland, 1986

Riley, M., _Customer - Service Trading - a Social- - Psychological Framework_, Tourism Management, June, 1986, p.101-112

Ryosuke, O., _Philosophical Reflections on Japans Cultural Context_, Japan Echo, 1989, vol.16, no.1, p.71-78

Schmidt, C., J., _The guided tour_, Urban life, 1979, vol.7, no.4, p.441-467

Schoebridge, N., _Happy hunting for Japanese Visitors_, Business Review Weekly, March 9, 1990, p.28,30

Schuchat, M.,G., _Comforts of group tours_, Annals of Tourism Research, 1983, vol.10, no.1, p.465-477
Schweder, R. and Levine, R., _Culture Theory: Essays on mind, self and emotion_, Cambridge University Press, USA, 1984

Shears, R., _Down the aisle, down under_, Sunday Press, June 5, 1988, p.18

Shipka, B., *International travel outlook*, proceedings
    1978 Travel Forum, Washington: US Travel Data
    Center, 1978, p.133-157

Smith, H., P., *Do intercultural experiences affect
    attitudes ?*, Journal of Abnormal and Social
    Psychology, 1955, vol.51, p.469-477

Smith, H., P., *The effects of intercultural
    experience a follow-up investigation*, Journal
    of Abnormal and Social Psychology, 1957, vol.54,
    p.266-269

Smith, V., L., *Hosts and Guests: The Anthropology of
    Tourism*, Philadelphia, The University of
    Pensylvania Press, 1976, p.8-12

Smith, V., *Touristic studies in Anthropological
    Perspective*, in Smith, V., *Hosts and Guests:
    The Anthropology of Tourism*, Philadelphia,
    University of Pensylvania Press, 1980,
    p.207-216

*Statistical Package for Social Science: SPSS User's
    Guide*, SPSS Inc, 2nd edition, USA, 1986

Steinkalk, E., Taft, R., *The effects of a planned
    intercultural experience on the attitudes and
    behaviour of the participants*, International
    Journal of Intercultural Relations, 1979,
    vol.3, no.2, p.187-198

Stringer, P., F., *Hosts and Guests: The Bed - And -
    - Breakfast Phenomenon*, Annals of Tourism
    Research, 1981, vol.8, no.3, p.357-375

Stringer, P., F., *Studies in the Socio-Environmental
    Psychology of Tourism*, Annals of Tourism
    Research, 1984, vol.11, no.1, p.147-164

Sutton, W., A., *Travel and understanding: notes on the
    social structure of touring*, International
    Journal of Comparative Sociology, 1967, vol.8,
    p.217-223

Taft, R., *Coping with unfamiliar cultures*, in
    Warren, N., (ed) Studies in Cross-Cultural
    Psychology, London; Academic Press, 1977, vol.1

Tajfel, H. and Dawson, J., *Disappointed Guests*, Oxford
    University Press, 1966

Trianidis, H., C. and Vassiliou, V., _Frequency of contact and stereotyping_, Journal of Personality and Social Psychology, 1967, vol.7, p.316-328

Understanding the Japanese tourists - A guide to tapping the market, prepared by Research Department of Tourism, Brisbane, June, 1988

Understanding the Japanese Market, proceedings of a Hospitality Industry Symposium held in Gold Coast, July 12, 1989

Uzzell, D., _An Alternative Structuralist Approach to the Psychology of Tourism Marketing_, Annals of Tourism Research, 1984, vol.11, no.1, p.79-99

Van Raaij, F., W., _Vacation Decisions, Activities and Satisfactions_, Annals of Tourism Research, 1984, vol.11, no.1, p.101-112

Walker, J., _Travel industry in trouble_, Weekend Australian, June 3-4, 1989

Walters, C., G., _Consumer behaviour: Theory and Practice_, Homewood, IL, Richard D. Irwin, Inc., 1982

Warner, R., _Understanding the Japanese tourists_, Caravan Park News, August, 1986, p.5-7

Warren, N. and Jahoda, M., _Attitudes_, Penquin Books Ltd, England, 1986

Watson, K., _An insight into successful marketing to the Japanese traveller_, Economic and Trade Bulletin, July/August, 1986, vol.18, p.1-6

White, M., _The Japanese overseas: can they go home again_, New York: Free Press; London: Collier Macmillan, 1988

Whiting, R., _Changing Values in Japanese Etiquette_, Winds, January, 1986

World Tourism Organisation, _Economic Review of World Tourism_, 1986

Zimmerman, M., _How to do Business with the Japanese - A Strategy for Success_, Mark Zimmerman, USA, 1985