

THE/1992/3  
Box THE/00006

# **THE POTENTIAL OF THE JAPANESE STUDENT MARKET FOR AUSTRALIA:**

**The Overseas Travel Expectations and Preferences  
of Japanese Tertiary students**



**Atsushi Wada**

A minor thesis submitted for the degree  
of Master of Business  
in Tourism Development  
Faculty of Business  
Victoria University of Technology  
Melbourne, Australia  
November, 1992

STA ARCHIVE  
30001001501578  
Wada, Atsushi  
The potential of the  
Japanese student market for  
Australia : the overseas  
travel expectations and

**DECLARATION:**

I Atsushi Wada hereby declare that the presented work has not been previously submitted by me for the award of any other academic degree.

[Redacted Signature]

Atsushi Wada

..15/FEB/93....

Date

# TABLE OF CONTENTS

	Page
TABLE OF CONTENTS	i
LIST OF TABLES	iv
ACKNOWLEDGMENT	ix
SUMMARY	xi

## CHAPTER 1 INTRODUCTION

1.1	BACKGROUND	1
1.2	AIMS AND OBJECTIVES OF THE STUDY	4
1.3	DEFINITIONS	5
1.4	LITERATURE REVIEW	6
1.4.1	Studies in Tourism Marketing	6
1.4.2	Studies in the Japanese Travel Market	9
1.4.3	Changes in the Japanese Society	13
1.4.4	Characteristics of the Japanese Travel Market	15
1.4.5	Importance of Market Segmentation	17
1.4.6	Various Segments in the Japanese Outbound market	19
1.4.7	Youth Tourism in the World	23
1.4.8	The Youth/Student Market in Japan	26

## **CHAPTER 2 THE JAPANESE TRAVEL MARKET**

<b>2.1</b>	<b>OVERVIEW</b>	<b>28</b>
<b>2.2</b>	<b>MARKET BACKGROUND</b>	<b>29</b>
2.2.1	Economic background	30
2.2.2	Socio-cultural Background	32
<b>2.3</b>	<b>JAPANESE OUTBOUND MARKET</b>	<b>35</b>
2.3.1	Age and sex	35
2.3.2	Purpose of Trip and Seasonality	36
2.3.3	Main Destinations	37
2.3.4	Length of Trip	38
2.3.5	Expenditure	39
<b>2.4</b>	<b>JAPANESE INBOUND MARKET TO AUSTRALIA</b>	<b>40</b>
2.4.1	Age and sex	40
2.4.2	Purpose of Trip and Seasonality	41
2.4.3	Regions Visited in Australia	42
2.4.4	Mode of Travel/Accommodation Used	43
2.4.5	Expenditure	43
<b>2.5</b>	<b>THE STUDENT MARKET</b>	<b>45</b>
2.5.1	Lifestyle of the Student	45
2.5.2	Student Travel Market	46

## **CHAPTER 3 METHODOLOGY**

<b>3.1</b>	<b>SECONDARY DATA COLLECTION</b>	<b>48</b>
<b>3.2</b>	<b>PRIMARY DATA COLLECTION</b>	<b>48</b>
<b>3.3</b>	<b>DEVELOPMENT OF THE QUESTIONNAIRE</b>	<b>50</b>

<b>3.4</b>	<b>SELECTION OF THE SAMPLE</b>	<b>51</b>
<b>3.5</b>	<b>PROCEDURE</b>	<b>52</b>
<b>3.6</b>	<b>DEMOGRAPHIC CHARACTERISTICS OF THE SAMPLE</b>	<b>54</b>
<b>3.7</b>	<b>LIMITATIONS OF THE STUDY</b>	<b>59</b>

## **CHAPTER 4 RESULTS AND ANALYSIS**

<b>4.1</b>	<b>EXPERIENCE IN OVERSEAS TRAVEL</b>	<b>61</b>
4.1.1	Overseas Experience in General	62
4.1.2	Experience in Overseas Travel as University Students	66
<b>4.2</b>	<b>INTENTIONS OF OVERSEAS TRAVEL</b>	<b>75</b>
4.2.1	Intention of Travel while at University	75
4.2.2	Intention to Make Graduation Trips	91
<b>4.3</b>	<b>INTENTIONS OF TRAVEL TO AUSTRALIA</b>	<b>98</b>
4.3.1	Intentions to Travel to Australia	98
4.3.2	Preferred Mode of Travel	101
	<u>Travel Companions</u>	101
	<u>The length of the Trip</u>	104
	<u>Seasons of Trip</u>	106
	<u>The Sources of Information</u>	107
	<u>Use of Packaged Tours</u>	109
	<u>Expenditure</u>	112
	<u>Mode of Transport</u>	114
	<u>Accommodation</u>	118
	<u>Use of Pre-purchased Products</u>	120
	<u>Multiple Destinations</u>	123

## **CHAPTER 4 CONCLUSION AND RECOMMENDATIONS**

<b>4.1</b>	<b>CONCLUSION</b>	<b>133</b>
<b>4.2</b>	<b>RECOMMENDATION</b>	<b>138</b>

## **APPENDICES**

Appendix A	Cover Letters and Questionnaires	141
Appendix B	Supplementally Information on the Japanese Market	156
Appendix C	Results of The Survey (Supplementally Data)	162

<b>BIBLIOGRAPHY</b>	<b>177</b>
---------------------	------------



# LIST OF TABLES

TABLE	PAGE
-------	------

## CHAPTER 2

1.	General Information on Japan	29
2.	Working Hours by Countries	33
3.	The Number of Japanese Travelling Overseas	35
4.	Japanese Overseas Travel by Age and Sex	36
5.	Japanese Travel by Areas of Destinations	38
6.	Japanese Travel to Australia	40
7.	Japanese Travel to Australia by Age and Sex	41
8.	Region of Stay	42
9.	Expenditure by Japanese Visitors in Australia	43
10.	The Number of Tertiary Students in Japan	45

## CHAPTER 3

11.	Comparisons of Demographic Information	57
12.	Ability in Foreign Languages	57
13.	Monthly Disposable Income in Yen	59
		62

## CHAPTER 4

14. Overseas Travel Experiences	62
15. Types of Overseas Travel Experience	63
16. Experience of Overseas Travel (Frequency)	64
17. Experience of overseas Travel as University Students	66
18. Experience of Overseas Travel as University Students (Frequency)	67
19. Destination of the Trips	71. 72
20. Purposes of the Trips	73
21. Intention of Travel while at University	75
22. Intention of Travel while at University by Ability in Foreign Languages	77
23. Intention of Travel While at University by Travel Experience	79
24. Preferred Destinations	81. 82
25. The Purpose of Trips Intended by Preferred Destinations (Selected Countries)	87
26. The Reasons for Not Wanting to Travel Overseas	89
27. Intention to make a Graduation Trip	91
28. Intention to make a Graduation Trip by Ability in Foreign Languages	93
29. Intention to make a Graduation Trip by Travel Experience	94
30. Preferred Destinations for a Graduation Trip	95
31. Intention of Travel to Australia	98

32.	Intention of Travel to Australia by Ability in Foreign Languages	100
33.	Intention of Travel to Australia by Travel Experience	100
34.	Travel Companions	101
35.	Travel Companions by Ability in Foreign Languages	102
36.	Travel Companions by Travel Experience	102
37.	The Length of the Intended Trips to Australia	104
38.	The Length of the Intended Trips to Australia (Mean and Median)	105
39.	Preferred Season for Travel	106
40.	Sources of Information (Selected)	107
41.	Sources of Information by Ability in Foreign Languages	108
42.	Uses of Packaged Tours	109
43.	Uses of Packaged Tours by Ability in Foreign Languages	110
44.	Uses of Packaged Tours by Travel Experience	111
45.	Expenditure Intended	112
46.	Expenditure Intended (Mean and Median)	113
47.	Preferred Mode of Transport	114
48.	Preferred Mode of Transport by Ability in Foreign Languages	116
49.	Preferred Mode of Transport by Travel Experience	117
50.	Preferred Mode of Accommodation	118
51.	Uses of Pre-purchased Vouchers/Coupons for Transport and Accommodation in Australia	120

52.	Uses of Pre-purchased Vouchers/Coupons for Transport and Accommodation in Australia by Ability in Foreign Languages	122
53.	Uses of Pre-purchased Vouchers/Coupons for Transport and Accommodation in Australia by Travel Experience	122
54.	Multiple Destinations	123
55.	Images of Australia	125
56.	Cities and Places that the Students Were Aware of and Wanted to Visit	130

# ACKNOWLEDGMENTS

I owe many thanks to those who have given assistance in the preparation of this thesis. My greatest thanks go to my supervisor, Mr Thomas Bauer, for his constant guidance and support throughout, far beyond the call of duty. Without his friendship, help and encouragement, this study could not have been completed.

I am also grateful to the staff of the Victoria University of Technology, for their assistance and encouragement, in particular, Ms Elisabeth Grove of the Educational Development Department, for extensive editorial assistance during the writing of the thesis. Thanks also go to Dr Robert Waryszak for providing critical comments and encouragement, and Paul Whitelaw and Gerald Sullivan of the Centre of Hospitality and Tourism Research, for their assistance in Computing and Word Processing.

Invaluable support was given by Recruit From A Inc. and Dentsu Research Inc., Japan, who provided insights into the Japanese travel market and helped in the collection and processing of data.

I would like to thank my family for their continuous support and encouragement, especially my father, whose knowledge of marketing in Japan was crucial in conducting the survey.

Finally, very special thanks to my friend Miss Kalpna Shukla, for her help, encouragement and friendship, which enabled me to bring the project to completion.

# SUMMARY

While young females have received considerable attention, relatively little research has examined other groups within the Japanese youth travel market. The young Japanese, like their western counterparts, have a strong desire for leisure activities, in particular, overseas travel. Among them, university and college students have become one of the major forces in the Japanese leisure and travel market. Students are believed to have relatively more spare time and money to realise their desire for overseas travel. However, there is little information available on their travel preferences and behaviour. This study, therefore, aimed to investigate the travel expectations and behaviour of Japanese tertiary students and their potential for Australian tourism.

In order to obtain the necessary information to identify travel expectations and behaviour of Japanese students, a detailed survey was conducted at a Japanese public university near Tokyo. In the process of data collection, 452 useable questionnaires were generated.

The results show that the Japanese student market is an important segment which generates a large volume of international travel and offers great opportunities for

Australia. One third of all Japanese students travel overseas during their four-year period at university, and it is likely that those who have travelled overseas will travel more than once. Given the number of tertiary students in Japan (2.6 million in 1990), the importance of the student market is indisputable. In addition, Australia is among the most popular destinations, in that nearly 90% of the Japanese students surveyed want to travel to this country. However, the author concludes that Australia has to adopt different marketing strategies, including products/service development and promotion, in order to capitalize on these opportunities.

Listed below are some important findings of this study in relation to the Japanese students' travel preferences and behaviours:

- (1) Ability to speak foreign languages is not as significant a factor affecting the travel expectations and behaviours of the students as has been believed.
- (2) Almost a quarter of the students wished to travel with friends rather than alone.



- (3) The average length of time the students wished to spend in Australia was 18.0 days, significantly longer than the average of 8 days for the present Japanese tourists to Australia.
- (4) The students would rely heavily upon travel agents in planning their trips to Australia, rather than upon television and radio.
- (5) All-inclusive packaged tours were not popular. However, a package of return air travel and accommodation would be attractive to students.
- (6) Private vehicles and railways were preferred to domestic air services as the most popular modes of transport.
- (7) Budget accommodation (Motels, Youth Hostels, Y.M.C.A) were more popular among male students, while more female students preferred up-scale accommodation, particularly resort hotels.
- (8) Australia was perceived as a country with attractive nature resources and lifestyle, but without tradition, culture and history.

# ***CHAPTER 1***

## ***INTRODUCTION***

## 1.1 BACKGROUND

In recent years, Japan has developed into one of the fastest growing international visitor markets in the world. Since 1985, the Japanese outbound market has grown rapidly, at the rate of 24% a year (Japanese National Tourist Organisation). The number of Japanese travelling overseas exceeded the 10 million milestone in 1990, recording 10.9 million a year earlier than projected by the government's 10 million Project (see chapter 2). More significantly, Japanese tourists are among the biggest spenders in the world. Reflecting the growth of Japanese outbound tourism, the number of Japanese travelling to Australia has increased dramatically, and in 1990, Japan became the biggest single international visitor market to Australia, replacing New Zealand (IVS, 1990). The trend continued in 1991, and the number reached 528,000 with a growth rate of 10.1% over the previous year (Australian Bureau of Statistics, 1991).

While the number of Japanese increased more than four times and its market share doubled in the five years between 1985 and 1990, Australia, nevertheless, captured only a 4.4% share of the total Japanese outbound market. Compared with other destinations such as Hawaii, the USA (main-land) and Western Europe, which have more than a 10% share each of the market, the Australian share is relatively small. Considering the popularity of Australia among Japanese as a tourist destination, it seems that there is room for

Australia to increase both its market share and its volume. In order to achieve this aim, it is essential that market research be carried out.

The importance of marketing studies of the Japanese market has been recognized in Australia, and there have been a number of studies of the Japanese market in order to capitalize on the rapid expansion of the Japanese outbound market. The Australian Tourist Commission (ATC) and the Bureau of Tourism Research (BTR) have had a leading role in these studies, which have identified general characteristics of the Japanese market. However, much of the emphasis has been placed upon only three major market segments - "Office ladies (Ols)", "Honeymooners" and "Silvers" - on which detailed information is available (Leiper, 1985). While it is necessary to concentrate on these larger segments, it is also essential to search for other smaller segments or sub-segments if Japanese tourism to Australian is to grow further.

One of the potential market segments that Australia should look at is the Japanese "student market", which consists of students at universities and colleges. The student market has become one of the major forces in the Japanese leisure and travel market. Even though the term "student market" has been widely used in Japan, there is little information available on this segment, such as size, back ground or travel behaviour. In Australia, the student

market has, until recently, attracted little attention. This may be due to the lack of information.

Despite this, it is estimated that students normally travel for a longer period of time than the average Japanese tourists or travellers - two to three weeks (Morris, 1991). They are believed to have more spare time and high disposable income, and are thus able to pursue their strong desire for leisure and travel (Prime Minister's Office of Japan, 1987). If this belief is correct, the student market has great potential for Australia. This view is supported by the ATC, which has recognized the student market as one of the "major market targets" (Market Brief - Japan, 1991). The BTR has recently completed a market report on the Japanese market, which provides detailed information on the student market to Australia, Japanese tourism in Australia, (1992). However, it does not provide information on the perceptions and needs and wants of Japanese students, but concentrates only on how they travel within Australia. This study, therefore, attempts to identify and analyse characteristics of the Japanese student market and the needs and wants of the students with regard to overseas travel.

## 1.2 AIMS AND OBJECTIVES OF THE STUDY

The aims and objectives of the study are to identify and substantiate a new segment - "the student market" - in the Japanese outbound market, and to analyse its characteristics. In the process of this analysis, the study attempts to answer the following research questions:

- 1) Is the student market of importance in the Japanese outbound market?
- 2) What are the characteristics and trends of the student market? What are their needs and wants regarding overseas travel?
- 3) What is the potential of the student market for Australia?

### 1.3 DEFINITIONS

Terms listed below are used in this study and defined as:

Student: a person who is studying at tertiary level such as universities or colleges.

Graduation Trips:

The trips taken by students in their final year at university or college, around the time of their graduation but before they enter workforce. These trips are usually taken around February and March.

## **1.4 LITERATURE REVIEW**

As a result of a literature review, it was found that, in the past, few studies of Japanese tourism have concentrated on the Japanese student market in Australia. In Japan, it is believed that there have been some market studies on the student market conducted by private companies (Japan Air Lines, Recruit From A Inc.), but the results of this research are not available to the public. A number of general studies of the Japanese outbound market (Bailey, 1986; Morris, 1989, 1991), and the Japanese inbound market to Australia (ATC, 1982, 1984, 1991; Leiper, 1985; BTR, 1992) were located. In recent years, some researchers have also investigated sociological aspects, such as cultural features of domestic tourism in Japan (Graburn, 1982) and the satisfaction level of Japanese tourists (ATC, 1990b; Langowoj, 1991). Moreover, in the USA and Europe, several researchers have looked into student/youth tourism as a significant source of tourists throughout the world (Adler, 1985; Riley, 1988, Cohen, 1982; Laarman & Perdue, 1989; Kale, McKntyre & Weir; 1987). In addition, the importance of marketing in tourism is widely recognized and a number of studies were located in this area of study.

### **1.4.1 STUDIES IN TOURISM MARKETING**

It would not be an overstatement to say that marketing is one of the most important aspects of tourism. The



importance of marketing for successful tourism planning has been recognized for some time and a number of publications have been written on marketing in tourism (Holloway & Plant, 1988: Goudall & Ashworth, 1988: Calantone & Mazanec, 1991: Middleton, 1989: King & Hyde, 1989). Marketing is vital to tourism because tourism is not merely a business activity, but a human activity as well. "Tourism gives an opportunity to fulfil the intellectual needs, learn about the world, discover other cultures, and interact with other people" (Langowoj, 1991 p.8). As Pearce pointed out, "if we do not understand the consumers' needs, motivations and satisfaction, then we cannot expect continued payment for the tourism product" (Langowoj, 1991: p.9). It is, therefore, necessary to understand the needs and wants of tourists in order to provide better tourism products and services. Marketing is one of the methods of identifying the needs and wants of tourists, and of developing better tourism products and services accordingly. According to O'Driscoll:

marketing seeks to identify potential customers' desires; to meet those desires from existing or newly-developed resources; to communicate to the customers, directly or indirectly, the attraction of the product; to facilitate purchase; and to secure satisfaction for the consumer (Goudall & Ashworth, 1988: p.218).

Successful marketing requires that the products or services be designed to meet consumer needs and wants. Therefore, consumer/market research is necessary to identify those needs and wants. Van Raaij (1986, p.6) suggested "Consumer wishes and desires should constitute the basis for

marketing strategies", and market research should be developed to identify these wishes and desires. Market research involves studies of general environments, such as economic, social, cultural and political factors, since these factors can influence the needs and wants of consumers and/or the behaviour of tourists. Factors such as discretionary income, life-cycle, lifestyle, social status, level of education are important determinants influencing consumers to make decisions relating to travel/vacation (Van Raaij, 1986), thus market demands.

As the needs and wants of the market are identified, they are used to develop products and/or services that tourism organizations should offer. This involves placing, pricing, promoting and actual development of products, which is often called the marketing mix. At this stage, a marketing strategy is developed. Once the needs and wants are identified and the tourism products or services developed accordingly, the products and services are then offered in the market place. Then, the tourism organization must rely on feedback from customers, competitors and employees, in order to adjust the marketing strategy or even to drop the products from the market place if necessary.

#### 1.4.2 STUDIES IN THE JAPANESE TRAVEL MARKET

Following the emergence of Japan as a tourist generating country in the late 1970s to early 1980s, several researchers attempted to identify and analyse the background to this emergence, and the characteristics of the market, in order to capitalize on the opportunity it provided.

The Australian Tourist Commission (ATC) has been playing a leading role in the area of market research in tourism to Australia. The ATC produced the Market Brief-Japan (1982), which is one of the earliest market studies on the Japanese inbound market to Australia. It is a comprehensive market study which covers not only the Japanese travel market but also general information on Japan, the structure of the Japanese travel industry, and Japanese business traditions and customs. The ATC has updated the study regularly as trends in Japanese market have changed from time to time. Leiper (1985) attempted to examine the potential and characteristics of the Japanese market and to identify the need for further research. While the ATC and Leiper placed a greater emphasis on the background of the Japanese market, Bailey (1986) and Morris (1991) focused on market trends and characteristics, such as popular destinations, mode of accommodation, duration of travel, and so forth.

The researchers agreed on several factors which initiated and supported the rapid growth of overseas travel in Japan in the early years after the liberalization of overseas travel which began 1964. These are:

1. Increase in discretionary income
2. Decrease in international airfares
3. Increase in available leisure time

(ATC, Market Brief - Japan, 1982: p. 15).

In the last three decades, Japan has experienced a rapid and remarkable economic growth and has become one of the biggest economic powers in the world. As this growth took place, disposable income increased accordingly. The dramatic rise in disposable income is clearly the main factor responsible for the growth in overseas travel in Japan, as the theory of tourism economics suggests. Between 1965 and 1980 (the period of the initial boom of overseas travel in Japan), the income per household grew five-fold while inflation remained low. During the same period, the number of Japanese travelling overseas increased 25 times, from 158,827 in 1965 to 3,909,333 in 1980 (ATC, 1982: p.7). Bailey (1986) also suggested that a strong relationship existed between the growth in travel (from 1975 to 1984) and the growth in real income and GNP.

During this period, despite the increase in disposable income, an overseas trip was still extremely expensive for

the average Japanese and thus considered as a 'once-in-a-lifetime' experience (ATC, 1982: p.12). It was the introduction of cheaper international air fares as a result of the introduction of Jumbo Jets that boosted overseas travel in Japan. "Bulk air fares" to major destinations, such as Hawaii and the US West Coast, were introduced between 1969 to 1973, and during the first three years of the 1970s, Japanese overseas travel grew at an average rate of 41% annually (ATC, 1982:p.14). Bailey (1986) also estimated that the increase in availability of package tours in 1972 and 1973 was one of the main reasons for this boom.

The simultaneous expansion of leisure time for Japanese workers enabled them to take advantage of the opportunities created by the economic factors mentioned above. One of the significant changes that occurred in the 1970s was the introduction of the five-day working week by Japanese companies (ATC, 1982, 1984). In 1970, only 4.4% of total Japanese enterprises used the five-day working week, and these covered 17.9% of the total workforce. By 1980, 47.6% of total enterprises had adopted the practice and 74.1% of the workforce enjoyed the additional weekly day off, although some companies only applied the five-day week once or twice a month or every second week. Average annual working hours in Japan had been reduced from 2239.2 hours in 1975 to 2108.4 hours in 1980 (Japan Year Book 1988).

There is no doubt that the leisure time available for Japanese workers has increased in the last few decades. However, there has been some confusion in previous studies between holiday entitlements and holidays actually taken by employees. While Bailey (1986) and Leiper (1985) argued that Japanese workers were awarded extremely limited holiday entitlements, the ATC (1982) had earlier pointed out that the problem was not the entitlement but the common practice among employees to limit or even not to take the paid holidays to which they were entitled. "The intense company loyalty of employees, particularly amongst the older generation" (ATC, 1982: 10), "reluctance to let one's fellow workers carry on un-assisted, a strong work ethic and weak leisure ethic" (Leiper, 1985: 39) were listed as the reasons for the workers not taking their full holiday entitlements.

However, these attitudes among Japanese workers, described by phrases such as 'company loyalty' or 'strong work ethic', have been changing. According to the ATC (1982, 1984), for young Japanese, particularly young females, taking an extended holiday is not considered a "privilege" but a "right", and thus they have no reluctance to do so. The young also possess a stronger desire for overseas travel than those of the older generation.

#### 1.4.3 CHANGES IN THE JAPANESE SOCIETY

Even though the ATC's studies (1982, 1984, 1991) are comprehensive and successfully provide a clear picture of the Japanese outbound market, they provide little information on the socio-cultural changes taking place in Japan. There has been little emphasis placed upon socio-cultural background of the Japanese market, though the importance of the socio-cultural background is widely acknowledged. Much of the attention has been paid to the economic growth of Japan, often described as "a miracle", but only a few studies have considered the relationship between tourism and the socio-cultural environment in Japan.

Graburn (1983) studied the major aspects of the Japanese culture and society in relation to tourism, and found similarities between the West and Japan. For example, tourism in Japan was often combined with religious and educational/learning activities, and thus bore a similarity to Christian pilgrimages in the past, or the 'grand tour' in Western societies. Further he distinguished two types of tourism in Japan: "Nature Tourism" (relating to nature, food, and recreation) and "Culture tourism" (shopping, art and culture), which were also similar to tourism in Western societies. He found that tourism in Japan was not a new phenomenon, as perceived in the West, but had been a popular leisure activity among Japanese for centuries. Moreover,

leisure has always been an important aspect of Japanese lifestyle, though work is dominant. Moeran (1983) looked into the socio-cultural aspects of tourism in Japan from the use of language in travel brochures. He concluded that "the concerns of the Japanese tourist are in fact mainly those of the American and European tourist" (p. 106).

Although it is obvious that the current boom (1987-) was initiated by the appreciation of the Japanese yen against the major currencies of the world since 1985, many researchers have agreed that the changes in Japanese society and culture have also contributed to the boom and will be the key to future growth. The Japan Travel Bureau Foundation has stated that, while acknowledging that the appreciation of the yen lowered the price of overseas travel and thus the psychological barrier against overseas travel, the changes in attitude towards leisure and travel have been the driving force for the boom. Morris(1989: p.32) indicated that changes in consumer behaviour would be crucial to the further growth in the outbound market, pointing to the fact that "Japanese consumers are changing their tastes, showing signs in particular of substituting leisure for work and marginal increases in income." More Japanese, particularly those in their twenties, regard leisure as more important than other aspects of daily life and prefer an increase in holidays to an increase in income. The ATC (1991) agreed with this analysis and connected the change in attitude toward leisure with the changes in the



family system in Japan. The tendency for fewer children per family and the increased number of women in the workforce have increased the disposable income and free time available for leisure. However, further research will be necessary in this area. Although Graburn (1983) did not examine the socio-cultural changes taking place in modern Japan, he suspected that travel behaviour among young Japanese had been changing and that this might be a reflection of the socio-cultural changes. He therefore suggested that further research was required in the area of Japanese youth tourism.

#### **1.4.4 CHARACTERISTICS OF THE JAPANESE TRAVEL MARKET**

If Japanese society and culture is changing as indicated by the previous studies, the characteristics of the Japanese market are likely to be changing at the same time. It is also likely that the needs and wants regarding leisure and travel among Japanese are changing as lifestyles change. What is certain is that, in recent decades, there have been rapid changes in the Japanese market, such as shifts in market segments and popularity of destinations.

A great deal of statistical information is available to indicate the characteristics, and needs and wants of Japanese tourists. Within Japan, various government departments collect statistical information on both international and domestic tourism, which is available

mostly in the Japanese language. The Prime Minister's Office of Japan (PMO) has conducted surveys of international and domestic tourism, lifestyle and leisure activities, in order to formulate government policies in these areas. The results of these surveys, carried out over the last decade, confirm the perception that Japanese have a more positive attitude towards overseas travel than ten years ago. Overseas travel is no longer a luxury for most Japanese, and more now give a higher priority to overseas travel than to domestic travel (PMO, 1987). The results also reveal the changes in the characteristics of the market. The proportion of females in the Japanese outbound market has increased dramatically, from 29% in 1980 to 38.2% of the total market in 1990. While the USA, Western Europe and Hawaii remain popular, other destinations such as Oceania and the Pacific islands are increasingly popular among Japanese.

The International Visitor Survey (IVS) produced by the Bureau of Tourism Research (BTR) has been one of the most valuable sources of information, providing an outline of international visitors to Australia. General information on travel markets, such as length of stay, expenditure, modes of transport and accommodation used and so forth, is available on each major market - the USA, Canada, the UK, Europe, Japan and other parts of Asia. The latest edition (1991) shows the characteristics of Japanese visitors to Australia. For example, Japanese visitors spent more money

per night compared with visitors from other countries (this is largely due to the fact that Japanese spend less time, on average 13 days, in Australia). The IVS also provides a brief picture of the changes that have taken place in the market over the years. Compared with 1985, more Japanese visited Queensland including the Great Barrier Reef, Brisbane and Cairns, but fewer visited Melbourne. An increasing number of Japanese participated in sports activities such as scuba diving and golf during their stay in Australia. This statistical information is a useful indication of general trends and characteristics among Japanese tourists. In addition, the BTR recently published a market report on the Japanese inbound market to Australia, based on the 1990 data, supplying detailed IVS data broken down into the major market segments (BTR, 1991).

#### **1.4.5 IMPORTANCE OF MARKET SEGMENTATION**

The needs and wants for travel can vary from individual to individual, depending on age, sex, occupation, social position, stage in life cycle, preference, and so on. Certain activities and places may be popular among the young, but not among other age groups. It is unlikely that a particular product or service can be attractive to all consumers/tourists in the market place. For this reason, market segmentation, which is the process of dividing a heterogeneous market for a service and/or goods into several homogeneous groups (segments), is among the best solutions

to increase the effectiveness of marketing. The importance of market segmentation has been widely recognized and a number of studies have been conducted on its application to tourism (Van Veen & Verhallen, 1986: Van Raaij, 1986). Various methods have been established for market segmentation, in which different variables are used. However, according to Van Veen & Verhallen (1986), there are three distinct approaches for market segmentation in general,

- (1) to segment the market on the basis of the similarity in consumer characteristics<sup>1</sup>, and subsequently to relate the difference between segments to behavioural differences (forward segmentation).
- (2) to segment the market on the basis of the similarity in behavioural response to the goods and service, such as benefit sought or frequency of usage, and to relate the difference between the segments to consumer characteristics (backward segmentation).

---

<sup>1</sup> There are two types of consumer characteristics; "general characteristics, such as sex, age, stage in life cycle, lifestyle, or personality, and situation-specific consumer characteristics, such as attitudes, opinions, perceptions, and preferences." (Van Veen and Verhalelen, 1986)

(3) to segment the market on the basis of the relationship between consumer characteristics and behavioural response to the supply of goods and service.

Traditionally, greater emphasis has been placed upon the first and second approaches, whereas general consumer characteristics are employed for market segmentation. However, the third approach has attracted increased attention among researchers (Kucukkurt, 1981: Van Raaij, 1986: Davis, 1986). In most studies of the Japanese market, forward segmentation, particularly on the basis of general consumer characteristics, such as age, sex, occupation has been used.

#### **1.4.6 VARIOUS SEGMENTS IN THE JAPANESE OUTBOUND MARKET**

Researchers have identified various market segments in the Japanese outbound market. The ATC (1982: 41-44) provided brief information on market segments, based on general consumer characteristics and on products, particularly the so-called "Bridal or Honeymoon Market". This has become one of the major markets for Australia. Most notably, Australia became the most popular destination among Japanese honeymoon travellers for the first time in 1987, and has been competing for the top spot with Hawaii since then (ATC, 1991). Apart from the Honeymoon market, the ATC identified another segment, the "Silver Market" which consists of people over 50, and also listed the

"Special Interest Tour Market", the "Technical Visit Market" and the "Incentive Travel Market" as having great potential for Australian tourism. However, information on these segments was not as comprehensive as that on the honeymoon market.

Since then, there have been changes in the segments of the Japanese outbound market, and the importance of segmentation has been increasingly recognized. Having realized the necessity of identifying various segments in the Japanese market, the BTR took a different approach to analysing the characteristics of Japanese tourists to Australia. Instead of analysing the data as a market whole, the BTR analysed the 1990 IVS data on the basis of various segments (Japanese Tourism in Australia - IVS Major Market Report Japan 1990, 1992). The BTR (1992) identified nine segments among the Japanese tourists to Australia based on age, occupation, sex, life cycle, and travel behaviour: First Time Travellers, Repeaters, Business Travellers, Silver and Mature-age Travellers, Honeymooners, Students, Office Ladies (OLs), Group Travellers and Fully Independent Travellers (FIT). The study provides detailed information on the Japanese inbound market to Australia, divided into these segments.

However, there are some questions to be asked about the segmentation methods used by the BTR. To segment the whole market into two segments - Repeater and First Time

Traveller, or Group and FIT - seems both too broad and too ambiguous. Moreover, the result shows how Japanese tourists travelled in Australia, but not how they want to travel in Australia. Nonetheless, this is the first market study to analyse various segments in the Japanese travel market and provide statistical information on the Japanese student market. The ATC (1991) identified seven "major market targets" based on occupation and demographics: "Honeymooners", "Single Working Women or Office ladies (Ols)", "Students and Single Working Men", "Middle-Aged Females", "Full-Mooners (mature couples)". Compared with the study carried out ten years ago (ATC, 1982), "Working Women (Ols)" and "Students and Single Working Men" have emerged as new market segments, while the "Honeymooners" segment remains a major market segment. The "Silver market" has been divided into smaller segments including "Full-Mooners" and "Middle-aged Females". These changes of market segment reflect the changes in Japanese society previously discussed. In general, there have been two major changes in the market characteristics of Japan.

By the mid 1980s, the number of young females in their twenties travelling overseas had increased dramatically, and it was obvious that this was not merely a temporary phenomenon. In particular, young single females working in offices - often described as "Office ladies (Ols)" in Japan - had become a dominant force in the youth market. It was widely recognized that this "Office ladies" segment

was the dominant and fastest growing group in the Japanese market and that the growth would continue in the near future (Bailey, 1986: Leiper, 1985).

By the late 1980s, more Japanese females in all age groups travelled overseas. In 1989, 38.2% of Japanese travelling overseas were female, compared with 34.5% in 1985 and 29% in 1980. "Office ladies" continued to be a major segment in the market, and were described as "a driving force in consumer behaviour in recent years" and "a trendsetter" (ATC, 1991 p. 42). The ATC (1991) identified this group as one of their major target market segments. While the "Office ladies" or "Single Working Women" segment has attracted much attention, more "middle-aged females" have also started travelling overseas. This general trend - more females travelling overseas - is believed to be a result of social and economic changes taking place in Japan. With more women working (including part-time jobs), they have relatively high discretionary incomes, enabling them to pursue their strong desire for leisure. Socio-cultural changes, such as fewer children, smaller families and later marriages, mean that they have more free time.

Another change that took place in the 1980s was the increase of young Japanese travelling overseas, although the increase was not as dramatic as the increase of females in the market. The share of youth, in the age group (0-19),



increased from 4.5% of the total market in 1982 to 6.4% in 1989, and for the age group (20-29), from 25.9% to 27.9% (White Paper on Tourism, 1983, 1986 and 1990). Industry sources in Japan claim that this is largely due to the increase in the number of overseas school excursions, and college/university students travelling overseas.

#### **1.4.7 YOUTH TOURISM IN THE WORLD**

The importance of the youth market is widely acknowledged. The youth market (segment) has become one of the most important segments in the travel market in recent years. Hence, a great deal of literature has been written on youth tourism, particularly in the USA and Europe. Historically, youth tourists have been referred to as "drifters", "wanderers" or "travellers", due to their behavioural difference in travel from others - that is long term travel and budget travel (Riley, 1988). Several researchers have investigated the youth market in relation to cultural and historical backgrounds. Adler (1985) associated tourism with youth travel during the eighteenth century Grand Tour in Europe. He concluded that, although contemporary youth travel was often romanticized and associated with tramping, it had become purely leisure oriented. Riley (1988) found that contemporary international long-term budget travellers, predominantly young adults, were not significantly different from mass tourists. Although the desire to escape from their normal

life and to delay "growing up" often motivate them to travel overseas, most expect to rejoin the society they have left - they are just having an extended holiday. In conclusion, he described them as budget travellers, travelling place to place for a long term, by taking advantage of the low costs of travel in developing countries, not as aimless drifters nor adventurers. He also found that the long term traveller tended to have different attitudes and behaviour regarding travel, such as more flexibility of itinerary and travel route, and tolerance of difficulties or setbacks:

Set backs are accepted - the cancelled plane, the full bus - because things that go wrong can be redefined as part of the adventure instead of something that ruins the trip (p. 327).

Kale et al. (1987) examined the travel preferences and potential of the youth segment (18 to 35 age group) in relation to overseas packaged tours. They found that the young adults (18 to 35 age group) had means, the affluence and free time, and desire to purchase international tour packages. It was also found that the travellers in this age group placed a high value on tour packages with free time and flexibility in the itinerary, exposure to the local culture, and the opportunity to visit scenic attractions, but that these values were not offered by existing tour packages. These preferences must be catered for by tour operators in order to attract the youth segment. They concluded that the potential of the youth segments was enormous, as young adults are likely to become long-term repeat customers.

Thibadoux and Helms (1990) investigated the potential and consequences of science students and researchers travelling to Costa Rica through study/research tours organized by an academic organization. It was found that these organized study/research tours, despite being designed for purely professional and academic purposes, increased tourists flow to the host country, Costa Rica. The students and researchers who participated in the tours, tended to become frequent return visitors for academic purposes combined with freedom of travel. In addition, the students and researchers were likely to influence a significant number of other people to travel to Costa Rica. They concluded that this type of organized tour for students and researchers could have a significant impact on small countries like Costa Rica.

Laarman and Perdue (1989) also examined the importance of student travel through the Study Abroad Programs, organized tours combining academic and touristic interests. It was found that the Programs gave significant benefits for students, such as an increased understanding of socio-cultural, business and educational environments in other countries. More importantly, they concluded that the Program would become more popular in the USA, and thus offer a great opportunity for the travel and tourism industry.

#### 1.4.8 THE YOUTH/STUDENT MARKET IN JAPAN

The Japanese youth and student market have recently attracted some attention in Japan and Australia. Previously, little attention had been paid to the youth market with the exception of the Office ladies market. The ATC (1991) recognized the importance of the student market, particularly for the "graduation trips" - the trips taken by the college/university students just before graduation and starting work. According to the ATC (1991), the size of the market for the graduation trips was estimated to be about 200,000 trips in 1990, and expected to increase 10-20 per cent a year. The ATC (1991) and Morris (1991) agreed that the students tended to travel for a longer period (around 2-3 weeks) than the average Japanese, and that Europe was their most popular destination.

Nevertheless, these are the mere perceptions in the tourism industry, and so far in the author's knowledge, no scientific study has been conducted on the Japanese student market. However, statistical data are increasingly available on the travel behaviour and preference of Japanese students. In Australia, the BTR and David H Jacobs Consultants (1992) analysed various market segments in the Japanese market including the student market using the 1990 IVS data. The result confirms this perception and shows that, on average, students spent 28 nights in Australia, compared with 13 nights for the market average. The study

also provides detailed information how the students travelled in Australia, including the cities visited, the pattern of expenditure and so forth. However, the IVS data used in this study includes secondary school students likely to be on school excursions, and anyone who comes to Australia for study purpose. Therefore, it does not provide a clear picture of the university and college student market. It is likely that secondary and tertiary students have different travel behaviours, preference and characteristics as their lifestyles, incomes and social status are different. Therefore, the result of the BTR study is not entirely applicable to the purpose of this study.

## ***CHAPTER 2***

# ***THE JAPANESE TRAVEL MARKET***

## 2.1 OVERVIEW

Japan has become one of the most important international travel markets in the last decade. More importantly, its total expenditure was ranked third in the world in 1990 (OECD Figure; Japan White Paper in Tourism, 1992). The number of Japanese travelling overseas has increased rapidly and this is expected to continue in the 1990's as general economic, political and socio-cultural conditions in Japan encourage overseas travel.

Despite a recent slowdown, the Japanese economy remains relatively healthy, compared with those of most OECD countries and the economic development of recent decades has made Japan the second richest country in the world. With high disposable income and low commodity price, the Japanese have enjoyed a luxury lifestyle in terms of material wealth. However, Japanese values in life have shifted from the material to non-material wealth. In particular, the young Japanese are becoming more leisure-oriented in pursuit of a better lifestyle. For them, overseas travel has become a symbol of a "better lifestyle" and one of the most desirable leisure activities. The Japanese government is now trying to encourage this "better lifestyle" trend by reducing working hours and introducing financial assistance for leisure activities.

## 2.2 MARKET BACKGROUND

Japan is a country consisting of 3,000 islands and located in the North Pacific off the coast of the Asian continent. Its climate is generally moderate but varies between the north, which has a severely cold winter and the south which has a hot humid summer. As Japan is basically a single racial and ethnic society with one official language, the Japanese consumer market is more homogeneous than those of other countries.

The following (table 1) is general information on the Japanese tourism market and its background.

**Table 1 General Information on Japan**

Population (1990)	123,612,000 (a)
Area	377,435 sq. Km (a)
GNP per capita (1990)	US\$ 25,655 (a)
Economic growth (1991) (1992)	3.1% (b) 2.2% est. (b)
International travel market (1990)	10,997,431 trips (c) US\$ 24,928 million (d)
Domestic travel market (1990)	190 million trips (d) ¥ 8,290 billion (d)

Sources: (a) Japan Statistical Yearbook, Ed. 1992  
(b) OECD figures, from The Economist Vol. 323,  
No. 7756  
(c) White Paper on Tourism, Ed. 1992  
(d) Tourism in Japan, 1991



### 2.2.1 ECONOMIC BACKGROUND

Despite the world-wide economic slump in the late 1980's, the Japanese economy outperformed other economies of the OECD countries with a steady growth rate of around 5% annually. In addition to this healthy growth, Japan has enjoyed low unemployment and inflation, and a massive surplus in its balance of payments.

The growth in the late 1980s was largely supported by a rapid increase in domestic consumption, particularly strong demands for consumer durables and leisure goods and services. Japanese corporations invested a large part of their profits on capital investments, and to a lesser extent, spent on employee benefits, including housing, transport and child benefits. Disposable incomes among the Japanese have increased as a result of steady increase in wages and low commodity prices. The changes towards a modern and sophisticated consumer society and more leisure-oriented attitudes among the young in Japan have increased the domestic demands.

Reflecting this strong economic growth, the Japanese Yen has appreciated against major currencies in the world since 1985. This has increased the international purchasing power of the Japanese, and thus the demand for imported goods. The Japanese government has been encouraging business and consumers to buy imported foreign goods in

order to reduce its massive current account surplus. An expansion of international tourism was the major part of the government's policy to increase imports, and the "Ten Million Programme" was set up in 1987, aiming to double the number of the Japanese travelling overseas to ten million by 1991. In order to achieve the target, the government encouraged Japanese to travel overseas by giving tax concessions for company-sponsored travel and simplifying the procedure for obtaining a passport. In addition, the amount of duty free allowance for Japanese residents returning from overseas was doubled to ¥200,000.

In late 1991, it was obvious that the Japanese economy was heading toward a recession. It is widely believed that this recession is a product of the speculative activities conducted by business and individuals in the late 1980s. Since 1990, billions of dollars have been wiped out in the Japanese stock market and property market. As a result, the major banks and corporations posted massive losses in the 1991-1992 financial year, and the number of bankruptcies filed have increased dramatically. Although, the OECD predicts Japan will achieve a 2.2% growth in 1992, which is still a healthy figure by world standards (The Economist, June 6th 1992), the lack of business and consumer confidence in Japan are apparent. The major corporations have announced a reduction in the number of new recruits from universities and colleges for the 1993 financial year. Industrial production remains low and retail sales have

fallen in the first half of 1992. These economic conditions may have a significant impact on tourism and result in a short term decline in overseas travel in Japan.

#### **2.2.2 SOCIO-CULTURAL BACKGROUND**

It is widely acknowledged that the Japanese consumer market is more homogeneous than those of other countries, in relation to its racial, religious and cultural characteristics. The unique employment and salary system - lifetime employment and seniority-based remuneration - have created almost a single social and economic class in Japan. Opinion polls show that more than 90% of Japanese people consider that they belong to the middle-class (Euromonitor Publications Ltd, 1985). This makes Japanese consumers extremely sensitive to trends, in other words, to what others do or buy. These trends are the major factors influencing the spending patterns and habits of Japanese consumers. However, there have been trends towards "individualism", and the consumers, particularly the young, are becoming more diverse and demanding.

There have been dramatic changes in Japanese society and culture in recent years. One significant change is that the Japanese are becoming more leisure-oriented than before. Although the standard of living in Japan has become one of the highest in the world as a result of the economic growth of the past decades, there is a perception that the Japanese

standard of living in relation to work, holiday and leisure life is low compared with those of other OECD countries. As table 2 shows, an average Japanese works for much longer hours a year than his/her counterpart in other OECD countries.

**Table 2    Working Hours by Country (1989)**

Country	Japan	USA	UK	Germany
Actual hours Worked/Year	2,159	1,957	1,989	1,638
regular Working Hours	1,905	1,759	1,802	1,544
Extra Working Hours	254	198	187	94

Source: Japan National Tourist Organization (1991)

The Japanese now place more emphasis on enjoying life than economic and material benefits. The 1990 opinion poll by the PMO shows that more Japanese (37.2%) desired to enrich their "leisure activities" than any other aspects of their daily life. Reflecting these changes in Japanese society, an increased number of the young Japanese are now taking short term employment contracts instead of the traditional life time contracts, as they provide more flexibility and freedom but less pay and job security. The trade unions have shifted their emphasis from pay rises to a reduction of working hours in the 1992 Shunto, the annual national wage negotiation (Mainichi Simbun, 10/3/92). The government has tightened regulations and laws to enforce the reduction of working hours. In 1989, the public sector introduced a five-day work week, followed by the financial

institutions, such as banks and insurance companies. However, the success of these policies will largely depend on the private sector, and the current labour shortages and economic slowdown may prevent companies from adapting to these working practices. For example, an average worker was entitled to 15.4 paid holiday in 1989, but only 7.9 days were actually taken (Ministry of Labour, 1991). Therefore, the corporate culture and strong work ethics in Japan, which discourage employees from taking paid holidays and encourage them to work overtime, must be changed in order to achieve this goal.

Another socio-cultural factor which may affect tourism is that Japan is one of the most rapidly aging societies in the world. In 1990, 12.1% of the Japanese population was over 65 years old, and it is estimated that the proportion will increase to 16.9% by the year 2000. According to Sakaiya (1988), the majority of this age group, however, are likely to stay in employment, due to Japanese custom and the serious shortage in the Japanese labour market in recent years. As the population of the younger generation is estimated to decline steadily, due to the low birth rate, the labour shortage will worsen in the future.

## 2-3 THE JAPANESE OUTBOUND MARKET

In 1990, the number of Japanese travelling overseas reached a record-high of 10,997,431, an increase of more than one million people, or 13.8%, over the previous year. In 1991, the Japanese market experienced negative growth for the first time since 1980, which is widely regarded as a result of the Gulf War. However, the market recovered strongly in the second half of 1991, a recovery which continues well into the early half of 1992.

**Table 3    The Number of Japanese Travelling overseas**

Year	Number	% Growth
1985	4,948,366	6.2
1986	5,516,193	11.5
1987	6,829,338	23.8
1988	8,426,867	23.4
1989	9,662,752	14.7
1990	10,997,431	13.8
1991	10,633,777	-3.3

Source: White Paper on Tourism, 1992

### 2.3.1 AGE AND SEX

In the last decade, the number of females travelling overseas has increased by 3.4 times, faster than that of males (2.4 times), and in 1990, 38.7% of those travelling overseas were female (4,253,859). More importantly, 40.8% of the total female travellers (or 1.74 million) were in the

20-29 years age bracket, and the female share accounted for 56.8% of the total in this age group. Males aged from 40 to 49 accounted for 26.5% of the total male travellers. Young males (aged between 20 and 29), despite having a strong desire for overseas travel, represent only 19.6% of the total male travellers. A survey (PMO, 1988) showed that "the lack of holiday/spare time" was the main reason preventing males in this age group (20-29) from travelling overseas, while financial reasons were the most common among all age groups.

**Table 4 Japanese Overseas Travel by Age and Sex (1990)**

Age	Male %	Female %	Total %
0- 9	1.6	2.5	1.9
10-19	3.6	7.1	5.0
20-29	19.6	40.8	27.8
30-39	22.7	14.1	19.4
40-49	26.5	13.5	21.5
50-59	16.2	12.3	14.7
60+	9.8	9.7	9.7
Total	100.0	100.0	100.0
Total Number	6,743,572 (61.2%)	4,253,859 (38.8)	10,997,431 (100.0)

Source: White paper on Tourism, 1991

### **2.3.2 PURPOSE OF TRIP AND SEASONALITY**

Pleasure was the dominant purpose for overseas trips among Japanese, accounting for 82.6% of the total in 1990. In recent years, business trips have shown a steady increase

in number, and in 1990, those trips accounted for 13.7% of the total. Generally, the summer months, particularly July and August, are more popular for overseas travel. However, there is little difference between the high season and other seasons. In recent years, there has been little growth in the departure volume during the summer season, due to capacity constraints of the air travel (Nippon Chokisai Ken Ginko, 1988).

### 2.3.3 MAIN DESTINATIONS

Asia has been the most popular destination among Japanese, due to its proximity to Japan. Despite the recent increase in popularity among females, 68.8% of those travelling to Asia were male in 1990. North America was the second most popular area, followed by Europe. Among females, North America was the most popular area, attracting 41.6% of the total female travellers in 1990. In recent years, the popularity of Europe, especially among young females, has increased dramatically, and the number of the Japanese travelling to Europe increased by 25.4% in 1990 over the previous year.

The USA was the most popular country among the Japanese, attracting 3.2 million visitors in 1990 (JNTO, 1991). However, the figure includes Hawaii and Guam, which attracted 1.44 million and 637,569 visitors from Japan respectively. Among single destinations, South Korea was



the most popular, with 1.46 million visitors from Japan, followed by Hawaii and Hong Kong (1.33 million). In Asia and Oceania, Malaysia and Thailand are increasing their popularity as beach resorts, among young females, while Australia has become one of the most popular destinations in recent years. Southern Europe, particularly Spain and Italy have also increased its popularity (see Appendix B).

**Table 5 Japanese Travel By Areas of Destinations (1990)**

Areas	Total %	Male %	Female %	Growth 89/90
Asia	47.7	53.5	38.4	13.5
Europe	11.1	10.0	12.9	25.4
Africa	0.4	0.3	0.5	-0.6
North America	35.5	31.6	41.6	13.1
South America	0.4	0.5	0.4	11.3
Oceania	4.9	4.9	6.2	1.0
Total	100.0	100.0	100.0	13.8

Source: Minister of Justice <sup>2</sup>

**2.3.4 LENGTH OF TRIP**

According to the Ministry of Justice (MOJ), the average length of trip (the period away from Japan) was 8.0 days in 1990, which has been decreasing steadily since 1986, when the figure was 8.8 days.

---

<sup>2</sup> These figures are based on the embarkation card, and only indicate the first and major destination.

### 2.3.5 EXPENDITURE

In 1990, the total tourist expenditure increased by 10% over the previous year to US\$ 24,928 million, while the amount of tourist expenditure per Japanese traveller was US\$ 2,266, a decrease of US\$ 62 over 1989 on the contrary (JNTO, 1991). Accommodation was the single biggest spending item, accounting for 51.4% of the total expenditure, followed by eating and drinking (21.6%), shopping (12.5%) and transportation (11.4%) (JNTO, 1991).

## 2.4 JAPANESE INBOUND MARKET TO AUSTRALIA

The Japanese inbound market to Australia has expanded dramatically in the 1980s, with the exception of 1989 when the market experienced a negative growth of 0.8% over the previous year. It was largely due to the pilot dispute and the after effect of the Bicentennial. The number of Japanese visitors reached a record high of 528,000 in 1991, representing 22% of the total inbound market to Australia. The Australian share of the total Japanese outbound market has increased from 1.2% in 1980 to 4.7% in 1991.

**Table 6 Japanese Travel To Australia**

Year	Number	Growth
1985	107,590	N.A.
1986	145,610	35.3
1987	215,560	47.9
1988	352,320	63.5
1989	349,540	-0.8
1990	479,900	37.3
1991	528,600	10.1

Source: BTR, IVS 1990

### 2.4.1 AGE AND SEX

Australia has been a popular destination among Japanese females. In 1990, the proportion of females in the total Japanese visitors to Australia was 46%, which is

substantially higher than the figure of 38.8% for the total Japanese outbound market (BTR, 1992). Younger age groups (15 to 24 years old) accounted for a quarter of the total arrivals (BTR, 1992). Particularly among females, the proportion of 15-24 years old age group was significantly high and accounted for 28.8% of the total female arrivals

**Table 7 Japanese Travel To Australia By Age and Sex, 1990**

Age /Sex	Male	Female	Total
0-14 years	3.9	4.6	4.2
15-24 years	13.5	28.8	20.8
25-34 years	34.9	33.2	34.1
35-49 years	24.9	13.0	19.2
50-64 years	17.3	15.9	16.6
65+ years	5.5	4.5	5.0

Source: BTR, IVS 1990

**2.4.2 PURPOSE OF TRIP AND SEASONALITY**

Pleasure/Holiday was the dominant purpose among Japanese visitors to Australia, accounting for 86% of the total Visitors in 1990. Since 1985, the share of the business trips has declined from 16.4% to 5.9%, despite the steady increase in volume (BTR, 1991). Although December is generally not among the most popular months for the Japanese to travel overseas, it was for travel to Australia in 1990, with a 9.9% share of the total visitors. The Japanese summer months, July to September, were also more popular for travel to Australia (BTR, 1991).

### 2.4.3 REGIONS VISITED IN AUSTRALIA

Despite its decline in popularity in recent years, Sydney was the most popular place in Australia in 1990, attracting 80% of the total Japanese visitors (BTR, 1992). However, Queensland, particularly the Gold Coast and Great Barrier Reef Region, has increased its popularity recently, attracting 67% of the total visitors. More importantly, the Japanese visitors spent more nights in Queensland (37% of the total) than in New South Wales (34%) in 1990. The popularity of Victoria and Melbourne has declined steadily, attracting only 27% of the total visitors, and 7% of the nights, in 1990, compared with 51% of the visitors and 15% of the nights in 1988. The average length of stay in Australia was 13 nights, longer than the average of the total Japanese outbound market (8.0 days).

**Table 8 Region of Stay, 1988 and 1990 (%)**

	88		90	
	visitors	nights	visitors	nights
NSW	95	37	83	34
ACT	2	1	4	6
VIC	51	15	27	8
QLD	56	30	67	37
SA	3	5	5	7
WA	7	7	7	8
NT	6	2	4	1
TAS	3	4	1	1

Source: The BTR, IVS 1988-1990

#### 2.4.4 MODE OF TRAVEL/ACCOMMODATION USED

One of the important features of the Japanese market is that visitors from Japan tend to travel in a group. The 1990 IVS data indicated that 62% of Japanese visitors travelled in groups and inclusive tours were still dominant products in the Japanese travel market. However, according to the BTR (1992), the size of the groups has been declining in recent years and more flexible tours (i.e. tours which include only a return airfare and accommodation) are becoming more popular among the young. In 1990, 74% of the Japanese visitors to Australia used inclusive tours (IVS 1990). Japanese visitors were more likely to use hotels with facilities (90% of Japanese visitors), domestic air (62%) and day tours (39%) than those from other regions.

#### 2.4.5 EXPENDITURE

**Table 9 Expenditure by Japanese Visitors in Australia**

	88	89	90
Total A\$	1,624	1,701	1,551
Per Night A\$	184	131	119

Source: BTR, IVS 1988-1990

The Japanese visitors spent an average of A\$1,551 in 1990. Although their total expenditure was not high compared with tourists from other countries, the Japanese visitors spent A\$119 a night, the highest among the visitors

to Australia. However, Japanese expenditure per night has been declining in recent years. Shopping was the biggest single item, accounting for 57% (A\$872) of the total expenditure among Japanese visitors.

## 2.5 THE STUDENT MARKET

There are over a thousand universities and colleges in Japan, catering for a total of 2,612,000 students (Japan Statistical Yearbook, 1991). A majority of the universities and colleges are located in either Kanto (around Tokyo) or Kansai Region (around Kyoto and Osaka). There are two types of tertiary institutions in Japan - one privately funded and the other publicly funded. Generally, the private institutions are larger than the public ones. Universities and colleges offer four-year degree courses, while junior colleges offer two-year diploma courses, mainly for female students.

**Table 10    The Number Of Tertiary Students in Japan (1990)**  
**(in '000)**

	Female	Male	Total
Uni/Colleges	584	1,549	2,133
Junior colleges	438	41	479
Total	1,022 (39.1%)	1,590 (60.9%)	2,612 (100%)

Source: Japan Statistical Yearbook (1991)

### 2.5.1 LIFESTYLE OF THE STUDENTS

It is very common in Japan for parents to support their children who are studying at university or college (Tanabe, 1990). While their living expenses are paid for by



parents, it is common for students to take part-time jobs in order to earn extra spending money.

Students at Japanese universities and colleges usually have three holidays a year, a two-month summer holiday between June and September, a two-to-three-week winter holiday at the end of the year, and a two-month spring holiday between February and April.

Japanese students, like other young Japanese, have a strong desire to travel overseas. A survey by the PMO in 1987 showed that 84% of tertiary students wanted to travel overseas, a figure which was higher than the overall - 62.9%. More importantly, 40.6% of the students said that they were eager to travel overseas while the majority of Japanese said that they would go only if they had the chance.

#### **2.5.2 STUDENT TRAVEL MARKET**

The Japanese tourism industry has developed an unique type of product for students - Graduation Trips. Graduation trips are usually made between February and March, just before graduation and the start of working life. Students tend to have more free time from their part-time jobs, club activities and school work during this period. Moreover, it is perceived among students that as the last chance for overseas travel in a long period of time. The

industry estimates that the size of the graduation trips market is about 200,000 to 300,000 per year.

# ***CHAPTER 3***

## ***METHODOLOGY***

### 3.1 SECONDARY DATA COLLECTION

A literature review to locate previous research in the area of study was carried out in Japan and Australia. A literature search in Japan was undertaken through Yokohama City University, Tokyo University library, and Japan Travel Bureau Foundation library, using an index of business and social studies. In Australia, the literature review was conducted mainly at Victoria University of Technology (V.U.T.) library, using Australian Business index and Austrom, a bibliographical database system. Later, the search was extended to US and European databases through the Dialog Information Service on Commonwealth Agricultural Bureau (CAB) Abstract via the V.U.T library. In addition, journals such as Annals of Tourism Research, Journal of Travel Research, Tourism Management, Sociology and Japan Echo were investigated.

### 3.2 PRIMARY DATA COLLECTION

It was found after the preliminary literature review that existing data were not adequate to complete the study of the student market to Australia and that it was therefore essential to gather primary data. The author conducted a series of interviews with people in the Japanese tourism industry, including Mr Miyazawa, an International Travel Division Manager of Recruit From A Inc and Mr Takenaga of

the Australia's Southern Tourism Promotion. However, the study required an instrument to measure the perceptions and characteristics of the Japanese student market, particularly to Australia. Various methods of data collection were considered, including experimental, observational and survey methods. As the purpose of the study was to identify the needs and wants, and characteristics of the student market, the survey method, also known as the questionnaire method, was found most suitable for the purpose. There were, however, a few problems in conducting the survey for this study:

- 1) the difficulty of reaching Japanese students, particularly in Australia, and thus to obtain reasonable sample size, and
- 2) high costs, time and effort associated with the survey.

The author reviewed the previous surveys conducted on the Japanese inbound market to Australia, and found that the proportion of students among the total sample was quite small. For instance, students represented only 1.1% of total sample in the survey conducted by Langowoj (1991). In the International Visitor Survey (1990), 10% of total visitors were students. However, this figure included students between 15 and 17 years old, who were at secondary school. It became obvious that the survey should be conducted in Japan in order to reach the Japanese students

effectively. The author unsuccessfully attempted to gain co-operation from several universities in Japan so that the survey could be conducted on campus, which would have reduced the costs, time and effort required for conducting the survey. The author also attempted to obtain financial and other assistance from several tour operators and airlines, both in Australia and Japan.

Even though the author could not obtain any assistance, it was necessary to conduct the survey before February as Japanese universities enter a three-month holiday in mid-February. Therefore, in December 1991, the author made a three-month research trip to Japan. There, the author obtained the assistance of the teaching staff of the Yokohama City University to conduct the survey on site at the university campus.

### **3.3 DEVELOPMENT OF THE QUESTIONNAIRE**

The questionnaire was developed in Japanese, although the draft version had been developed first in English in Australia, with the assistance of Mr Thomas Bauer of the Victoria University of Technology. Questionnaires employed in the surveys of travel and tourism previously conducted by the Prime Minister's Office of Japan (1986, 1987, 1989) were used as models. In addition, several research officers from Dentsu Research Corporation, a marketing research company in Tokyo, provided valuable assistance in the

development of the questionnaire. It was then revised, using comments and criticism from teaching staff of Yokohama City University, and a group of ten Japanese college students from the pilot test. The pilot test revealed that the questionnaire was too long and the layout needed improvement.

### **3.4 SELECTION OF THE SAMPLE**

Although it was desirable that the survey be conducted at several different universities or colleges, the author had been unable to obtain co-operation from officials at other universities by the middle of January, 1992. To conduct the survey outside the universities would have involved excessive efforts in terms of finance and time. Therefore, the author decided to conduct the survey at Yokohama City University. The reasons for choosing this particular university were that

1. Yokohama is the second biggest city in Japan, approximately 30 km from Tokyo, where the socio-cultural trends of Japan as a whole are set.
2. Although the university is small - 3,297 students - the characteristics of the students at the university vary in relation to socio-demographics and the area of study.

3. Female students at the university constitute 34.3% of the total student population. (January 1, 1992) In Japan as a whole, 39% of the college/university students are female( Japan statistical yearbook, 1991).
4. The university's three faculties - arts and science, commerce and medicine - are subdivided into five departments - arts, science, business, economics and medicine - offering more than fifteen highly varied areas of study.
5. According to information provided by the university administration, about half of the students are from the Kanto region, including 25% from Yokohama City; 30% are from Kansai and the rest from other parts of Japan.
6. The author is a graduate of the university and the teaching staff at the university, therefore, offered extensive cooperation.

### **3.5 PROCEDURE**

The survey was conducted at the campus of Yokohama City University. In February 1992, 280 questionnaires were distributed to students in three separate class rooms during lecture time. Each student received a three-page questionnaire and a covering letter (Appendix A). The students were given brief instructions and asked to answer



the questions. The classes were chosen to include students from all departments and all academic years.

- 130 students from 'physical science' (first and second year students in all departments)
- 100 students from 'business administration theories' (third and fourth year students in the business and economics departments), and
- 60 students from the 'modern Japanese history' class (second, third and fourth year students in the arts department).

As a result of this process, 265 completed questionnaires were collected. In addition, in order to increase the sample of size and cover all departments, 200 questionnaires were distributed in several locations at the campus, over a period of three days. Seven students were employed in the distribution and collection of the questionnaire, and sample and locations were selected randomly, and 187 useable questionnaires were collected. In total, 490 questionnaires were distributed and 452 useable questionnaires were collected (92.2%). Twenty-two questionnaires were either returned blank or not returned, and sixteen questionnaires were not completed fully.

Computer database software developed by Dentsu Research Co was used in data processing, and all data were entered and statistically processed in Japan.

### 3.6 DEMOGRAPHIC CHARACTERISTICS OF THE SAMPLE

The sample of this study consisted of 452 students of the Yokohama City University (Y.C.U). Table 11 shows the information on the sample, according to sex, university year and area of study. Demographic information on the students of the Yokohama City University is also shown in the table in order to determine how representative this sample is of the overall student population of the university.

The results show that 65.9% of the sample was male and 34.1% female. First year students were the largest group represented, accounting for 34.5% of the total sample. Compared with the overall YCU figure, first year students were over-represented in this study, while the proportion of males to females were similar. According to the administration of the YCU, the reason for over-representation of first year students is that, in the first year, students have more examinations, and thus were more likely to be on campus at the time the survey was conducted (during the final examination period).

The majority of students (35.8%) were from the department of business, followed by the departments of economics and arts. Compared with the YCU figure, the business students were also over-represented while science students were under-represented.

**Table 11   Comparisons of Demographic Information**

		Sample	Y.C.U
S e x	Male	65.9	64.4
	Female	34.1	35.6
U n i  y r	1st year	34.5	22.9
	2nd year	20.6	27.2
	3rd year	21.7	22.8
	4th year	23.2	27.0
D e p t	Business	35.8	24.7
	Economics	28.5	23.5
	Arts	25.9	24.3
	Science	3.3	15.4
	Medicine	1.5	3.8

In analysing the responses with regard to the students' ability to communicate in foreign languages (table 12), it was not surprising to the author that the majority of the students perceived that their ability in foreign languages was very limited.

**Table 12   Ability in Foreign Language**

	%
Fluent	3.8
Quite Well	8.0
A little	43.1
Hardly Any	45.1

43.1% of the students said that they had a little command of foreign languages, and 45.1% said that they could hardly speak any words in foreign languages. This confirms a common belief that Japanese have difficulty in speaking foreign languages (Bailey, 1986: Morris, 1991)<sup>1</sup>. Only a small proportion of the students had confidence in their fluency in foreign languages: 3.8% said that they could speak foreign languages fluently, and 8.0% said that they could communicate quite well. It must be acknowledged, however, that the measurement of ability was subjective. For example, "A little" or "Quite well" can mean different things to different people. Therefore, this result should be seen as an indication of the confidence of the students in their foreign language ability. Hence, it indicates only how the students' confidence in foreign languages will affect their travel behaviour.

Tourism depends on the availability of disposable income. Table 13 shows the monthly disposable income that students can spend freely. Students are often dependent on their parents for financial support, including spending money. Moreover, they can earn from their part-time jobs as it is not difficult to find them in Japan.

---

<sup>1</sup> English is compulsory in Japanese secondary schools. In universities, students have to complete general study units which include English and other foreign languages. However, an emphasis is placed upon writing and reading, not upon conversation.

**Table 13 Monthly Disposable Income in Yen<sup>2</sup> (¥)**

	¥30,000 approx	¥40,000 approx	¥50,000 approx	¥60,000 - 70,000	¥80,000 - 90,000	over ¥100,000
Total	42.3	15.3	16.2	11.1	3.3	8.0
Male	39.3	15.4	15.8	12.4	4.0	9.0
Female	48.1	14.9	16.9	8.4	1.9	5.7
1st year	50.6	17.3	12.2	7.1	3.2	4.5
2nd year	43.0	18.3	12.9	14.0	3.2	3.2
3rd year	36.7	11.2	18.4	14.3	3.1	12.2
4th year	34.3	13.3	22.9	11.4	3.8	13.5

The largest proportion (42.3%) of the students had disposable incomes of approximately 30,000 yen a month.<sup>3</sup> 50,000 yen was the next most popular income category followed by 40,000 yen, accounting for 16.2% and 15.3% of the total, respectively. However, more third and fourth year students belonged to the higher disposable income categories than the first and second year students. The first and second year students, who are taking compulsory general study units, tend to be busier than the third year and fourth year students, which may prevent them from taking part-time jobs, and thus lower their incomes. Unlike young working females (OLs) who enjoys higher disposable incomes than their male colleagues, the female students had lower income than the male students.

---

<sup>2</sup> A\$1 = ¥89 (Aug, 1992)

<sup>3</sup> In asking about disposable incomes, the Japanese word "Okozukai" was used. The word means 'spending money', 'disposable' or 'discretionary incomes'.

With the recent reductions of the price of overseas travel (particularly packaged tours), which now start around 80,000 yen for a package tour to Hawaii, Guam, Saipan and some Asian countries, and around 100,000 yen or less for to Australia and the US West Coast, it is no longer considered expensive for the majority of students to travel overseas.

### 3.7 LIMITATIONS OF THE STUDY

The author acknowledges that there are limitations in this study despite maximum efforts to increase the objectivity and validity of the study.

Firstly, the sample was only from one particular university, and thus does not represent the whole student market in Japan. Secondly, the sample has some problems with true representativeness of the student population at the Yokohama City University. First year students are over-represented, while the students from science department under-represented. In addition, there is the possibility, as the author employed seven students of Yokohama City University to conduct the survey, that some bias were involved in their choice of sample and/or that the respondents had some bias in answering the questions.

Finally, frequency and percentage are used in this study. Therefore, this study is descriptive rather than analytical

## ***CHAPTER 4***

### ***RESULTS AND ANALYSIS***



### **Forward**

This chapter discusses the results of the survey. It consists of four parts: travel experiences, intentions to travel overseas, travel intentions and preferred modes of travel to Australia, and images of Australia among the students.

## 4.1 EXPERIENCE IN OVERSEAS TRAVEL

This section consists of two parts: overseas experiences in general and overseas travel experience since the students entered university. It was important and also necessary to ask the students about their travel experiences in the past in order to determine the potential of the student travel market. The questions were originally designed to establish the kind of overseas experience the students had previously had and the likely influences of their different experiences in overseas travel on their travel behaviour in the future. For example, it was thought that if students had previously stayed overseas for three months or more, the experience might give them confidence and make them feel less nervous and shy when travelling overseas. These psychological hindrances, in addition to the language problem, have often been used to explain why Japanese tourists travel in groups and have different travel behaviours from American and European tourists (Langowoj, 1991).

4.1.1 OVERSEAS EXPERIENCE IN GENERAL

Table 14 Overseas Experience

Q1. Have you ever been overseas?

		Yes	No	Total
Sex	Male	79 26.5%	219 73.5%	298 100.0%
	Female	64 41.6%	90 58.4%	154 100.0%
University	1 st year	35 22.4%	121 77.6%	156 100.0%
	2 nd year	23 24.7%	70 75.3%	93 100.0%
	3 rd year	39 39.8%	59 60.2%	98 100.0%
	4 th year	46 43.8%	59 56.2%	105 100.0%
Total		143 31.6%	309 68.4%	452 100.0%

Table 14 shows that 143 students, 31.6% of the total sample have been overseas. Amongst those who have been overseas (Table 15), 92% of them went overseas for travel and 7.7% stayed for three months or more.<sup>4</sup> According to a survey conducted by the Prime Minister's Office of Japan (PMO) in 1988, 22.6% of the Japanese had been overseas. In the 20-24 years old age group, 17.6% had travelled overseas. Comparing these PMO figures with the results of this study, it becomes clear that a greater proportion of the students have been overseas than the Japanese market as a whole. However, it must be remembered that, since 1988, the number

<sup>4</sup> According to the Prime Minister's Office of Japan, a 'stay' is defined as being at one place for more than three months.

of overseas travel by the Japanese has increased by more than 30% and also that more young Japanese are now travelling overseas than ever before.

**Table 15   Types of Overseas Experience**

Q1-1 If yes in Q1, was that a trip or stay (three months or more)?

	Stay	Travel	Total
Total	11 7.7%	132 92.3%	143 100.0%

Female students were more likely to have had overseas experience than their male colleagues. 41.6% of the female students had been overseas compared to 26.5% of males. This confirms the popular belief in the Japanese tourism industry that young females travel more often than young males. One popular explanation is, according to Mr Miyazawa, an International travel Division Manager of "Recruit From A Inc.", in Tokyo, that young females usually receive more financial support from their parents, and thus are more affluent than males. According to the Japan Travel Bureau, the majority of the female students using their packaged tours said that their parents paid for the tours (Yomiuri Shimbun, 20/1/92). Therefore, despite their lower disposable income (Table 13), they may have more purchasing power in relation to travel and tourism. In addition, 43.8% of the fourth year students have travelled overseas before.

These figures indicate a great potential of the student travel market. Mr Hosomura, Managing Director of JTB Global Club, a subsidiary of the Japan Tourist Bureau Inc, supported this by stating that more than half the university/college students, nowadays, travel overseas before graduation (Yomiuri Shimbun, 20/1/92).

**Table 16 Experience in Overseas Travel (Frequency)**

Q1-SQ. How many times have you travelled overseas?

		Once	Twice	Three times	4 times or more	N.A.	Total <sup>5</sup>
Sex	Male	41 56.9%	20 27.8%	6 8.3%	5 7.0%	0 0%	72 100.0%
	Female	33 55.0%	11 18.3%	9 15.0%	6 10.0%	1 1.7%	60 100.0%
University Year	1 st Year	18 58.1%	5 16.1%	5 16.1%	3 9.7%	0 0%	31 100.0%
	2 nd year	18 78.3%	5 21.7%	0 0%	0 0%	0 0%	23 100.0%
	3 rd year	18 50.0%	8 22.2%	7 19.4%	2 5.6%	1 2.2%	36 100.0%
	4 th year	20 47.6%	13 31.0%	3 7.1%	6 14.3%	0 0	42 100.0%
Total		74 56.1%	31 23.5%	15 11.4%	11 8.3%	1 0.8%	132 100.0%

The majority (56.1%) of the students who have travelled overseas have travelled once, and 23.5% of them have travelled twice. Fourth year students have travelled more frequently than their younger colleagues. Surprisingly,

<sup>5</sup> The total is the number of the students who answered 'Travel' in Q1-1 (who have travelled overseas).

25.8% of the first year students who have travelled have done so more than three times even though this figure accounts for only 5% of the total first year students. There are two possible explanations for this. One possibility is that the students may have lied to impress their friends or to please the researcher. The other possibility is that the students travelled extensively with their families or as part of a school excursion. The ATC (1991) suggested that an increased number of Japanese high schools chose overseas countries as a destination for a school excursion or study trip. According to Mr. Miyazawa of Recruit From A Inc., more school children are travelling overseas through study trips, school excursions and family trips than five years ago.

4.1.2 EXPERIENCE IN OVERSEAS TRAVELS AS UNIVERSITY STUDENTS

It is, therefore, more relevant to analyse the travel experience of the students since they entered university as tertiary students, in order to find out their travel behaviours and the characteristics of the student market.

Table 17 Experience in Overseas Travel as University Students

Q2 Have you travelled overseas since you entered the university?

		Yes	No	Total <sup>6</sup>
Sex	Male	58 73.4%	21 26.6%	79 100.0%
	Female	47 73.4%	17 26.6%	64 100.0%
University year	1st year	11 31.4%	24 68.6%	35 100.0%
	2nd year	18 78.3%	5 21.7%	23 100.0%
	3rd year	35 89.7%	4 10.3%	39 100.0%
	4th year	41 89.1%	5 10.9%	46 100.0%
Total		105 73.4%	38 26.6%	143 100.0%

Table 17 shows that 105 students, or 73.4% of those who have travelled overseas have travelled since they entered the university. That is, almost one in four students at the YCU (23.2% of the total of 452) have travelled overseas since entering the university. Again, a greater proportion

<sup>6</sup>The total is the number of the students who answered 'yes' in the Q1 (who have been overseas before).

of the female students have travelled overseas during their years at the university than their male counterparts. 30.5 % of the female students (47 out of the total sample of 154) have experienced overseas travel compared to 19.5% of the male students (58 out of 298). Having entered the university nine months ago, only eleven first year students have travelled overseas since then. This suggests that it is not unusual for school children to travel overseas, which supports the industry opinion mentioned before. The third year and fourth year students are more likely to have travelled overseas as tertiary students. More than one in three third/fourth year students at the YCU (76 students out of the total sample of 203) have travelled overseas during their university years.

**Table 18    Experience in Overseas Travel as University Students.    (Frequency)**

Q2-1.    If yes in the Q2, how many times have you travelled overseas since then?

		Once	Twice	Three times	4 times or more	N.A	Total
Sex	Male	35 60.0%	15 25.9%	2 3.4%	3 5.2%	3 5.2%	58 100.0%
	Female	28 59.6%	9 19.1%	6 12.8%	3 6.4%	1 2.1%	47 100.0%
University Year	1st Year	8 72.7%	2 18.2%	0 0%	0 0%	1 9.1%	11 100.0%
	2nd Year	16 88.9%	1 5.6%	0 0%	0 0%	1 5.6%	18 100.0%
	3rd Year	18 51.4%	10 28.6%	5 14.3%	1 2.9%	1 2.9%	35 100.0%
	4th Year	21 51.2%	11 26.8%	3 7.3%	5 12.2%	1 2.4%	41 100.0%
Total		63 60.0%	24 22.9%	8 7.6%	6 5.7%	4 3.8%	105 100.0%



As table 18 shows, more third and fourth year students, a total of 35, have travelled twice or more, accounting for 17.2% of the total third and fourth year students (total sample of 203). Only three first and second year students have travelled more than once since their entry to university.

Table 19 shows that the USA was the most popular destinations among the students: 29 students have visited the United States since they entered the university, as shown in Table 19. More than one quarter of the students who have travelled as university students, which is 6% of the total sample, have been to the USA. This result is not surprising as the USA has been one of the most popular destinations among Japanese for many years. Hawaii<sup>7</sup> and Western Europe were the second most popular destinations, 21 students having visited each place. Asian countries were also popular among the students, attracting 77 students of the sample<sup>8</sup>. South Korea attracted 13.3% of the students who have been overseas, probably due to proximity and the inexpensive costs of travel - a ferry service operates between Japan and South Korea taking only a few hours and costing less than ¥20,000 return. Hong Kong and Macau, and Singapore have established their reputation as a destination

---

<sup>7</sup> Hawaii has traditionally been treated as a single destination but not as a part of the USA.

<sup>8</sup> This figure does not necessarily indicate the actual number of the students who visited Asian countries due to the possibility of multiple visits.

for shopping and for first-time travellers in the Japanese market. It was not surprising that only six students have been to China although it has been a popular and also inexpensive destination for Japanese travellers. Following to the Tiananmen Square Incident, the Japanese government placed restrictions Japanese nationals visiting China. Despite its popularity in general, Australia did not attract as many students as the USA or Europe. This will be discussed in detail later in this study.

These results of the popularity of destinations follow the general trends in the Japanese market (see chapter 2). According to a survey conducted by Mainichi Shimbun (Oct, 1989 - July, 1990), the USA (19.3%), Hawaii (15.0%), France (11.6), the UK (9.5%) and Australia (8.0%) were the five most popular destinations among Japanese who travelled overseas during the period. The PMO's survey (1988) showed that, among young Japanese aged between 20 - 24 years old who had been overseas, the Pacific Islands (Hawaii, Guam, Saipan, etc) were the most popular destination, visited by 35.5%. visited. North America was the second most popular (25.4%), followed by Western Europe (16.9) and East Asia, which included China, H.K. and Korea (16.2). Oceania was more popular among the young having been visited by 12.3%.

While the USA and Europe are popular among both male and female students, Asian countries are generally more popular among male students than female students, with the

exception of Hong Kong/Macau, China and Taiwan. The Pacific islands such as Hawaii, Guam and Saipan, as well as countries in Oceania, and Canada, are popular destinations among the female students. According to Japan Travel Bureau (Nippon Chokisaiken Ginko, 1988), this is largely due to the current trends towards beach resorts, and both for Canada and Europe, due to romantic the images created by the media and the tourism industry.

Table 19 Destinations of The Trips

Q2-2 Which countries have you travelled to (Multiple Answers)?

		Total	Taiwan	Korea	H.K. Macau	Philippines	Thailand	Singapore	China	Other South East Asia	Guam Saipan	Hawaii
Sex	Male	58 100%	2 3.4%	10 17.2%	7 12.1%	1 1.7%	8 13.8%	10 17.2%	2 3.4%	9 15.5%	4 6.9%	7 12.1%
	Female	47 100%	4 8.5%	4 8.5%	7 14.9%	1 2.1%	2 4.3%	4 8.5%	4 8.5%	2 4.3%	6 12.8%	14 29.8%
Un i Y c a r	1st year	11 100%	1 9.1%	2 18.2%	3 27.3%	1 9.1%	0 0%	1 9.1%	0 0%	1 9.1%	1 9.1%	1 9.1%
	2nd year	18 100%	0 0%	1 5.6%	0 0%	0 0%	1 5.6%	1 5.6%	1 5.6%	0 0%	0 0%	11 61.1%
	3rd year	35 100%	3 8.6%	4 11.4%	6 17.1%	1 2.9%	2 5.7%	6 17.1%	3 8.6%	3 8.6%	1 2.9%	3 8.6%
	4th year	41 100%	2 4.9%	7 17.1%	5 12.2%	0 0%	7 17.1%	6 14.6%	2 4.9%	7 17.1%	8 19.5%	6 14.6%
Total		105 100%	6 5.7%	14 13.3%	14 13.3%	2 1.9%	10 9.5%	14 13.3%	6 5.7%	11 10.5%	10 9.5%	21 20.0%

Table 19 Destinations of the Trips (Cont.)

		Total	South Pacific	Australia	New Zealand	U.S.A	Canada	Sub/Central America	Eastern Europe	U.S.S.R	Western Europe	Africa, Middle East	Others
Sex	Male	58 100%	1 1.7%	3 5.2%	1 1.7%	19 32.8%	4 6.9%	1 1.7%	0 0%	3 5.2%	12 20.7%	3 5.2%	3 5.2%
	Female	47 100%	2 4.3%	5 10.6%	2 4.3%	10 21.3%	8 17.0%	1 1.7%	1 2.1%	5 10.6%	9 19.1%	0 0%	0 0%
Univariate	1st year	11 100%	1 9.1%	2 18.2%	1 9.1%	4 36.4%	4 36.4%	1 9.1%	0 0%	0 0%	2 18.2%	0 0%	0 0%
	2nd year	18 100%	0 0%	0 0%	0 0%	1 5.6%	1 5.6%	0 0%	0 0%	0 0%	2 11.1%	0 0%	0 0%
	3rd year	35 100%	2 5.7%	2 5.7%	1 2.9%	13 37.1%	4 11.4%	1 2.9%	0 0%	3 8.6%	8 22.9%	2 5.7%	1 2.9%
	4th year	41 100%	0 0%	4 9.8%	1 2.4%	11 26.8%	3 7.3%	0 0%	1 2.4%	5 12.2%	9 22.0%	1 2.4%	2 4.9%
Total		105 100%	3 2.9%	8 7.6%	3 2.9%	29 27.6%	12 11.4%	2 1.9%	1 1.0%	8 7.6%	21 20.0%	3 2.9%	3 2.9%

Table 20    The Purposes of the Trips

Q2-3   What was the purpose of the trip? (Multiple Answers)  
(%)

		Holiday	V.F.R	School Event	Training/ learning	Study	Others
S e x	Male	86.2	15.5	0	3.4	1.7	1.7
	Female	74.5	12.8	17.0	17.0	4.3	4.3
Total		81.0	14.3	7.6	9.5	2.2	2.9

‘Holiday’ was the dominant purpose of the trips and 81% of the students have travelled overseas for this purpose.<sup>9</sup> Surprisingly, 14.3% of the students travelled overseas for V.F.R (Visiting Friends and Relatives). This figure is significantly higher than the figure for the Japanese market as a whole, which was less than one percent in 1991 (The Ministry of Justice, 1992). It is possible that the figure of 14.3% was just an exception. However, it is also possible that the figure is representative of the Japanese student market. It is traditionally popular for children to spend their school holiday with relatives or family friends. Although this has been common within Japan, it is possible, if not probable, that the tradition has now been extended to overseas. As a result of the Japanese economy becoming more international, more Japanese are now working and living overseas than ten years ago.

<sup>9</sup> The figure does not add up to 100 due to multiple trips.

17% of the female students (8 students) have travelled for training/learning and school events. From a brief interview with the students, the author found out that this school trip had been held in Hawaii for a group of students, majoring in education in order to learn different teaching techniques and to experience a different education system. In Japan, it is now popular for a group of students, such as a seminar, tutorial group or even an entire department or school, to conduct a study/training trip. Training/learning trips, which usually involve more practical or technical learning than study trips have become popular in Japan. Even a trip which involves any form of learning such as history, culture or arts may be called a 'training/learning' trip. Study trips often involve enrolment in a course at institutes such as language schools or universities. However, it is often difficult to distinguish between the two.

In summary, the results revealed that a greater proportion of Japanese students have travelled overseas than the Japanese market as whole, indicating the importance of the student market. Particularly, more than one in three senior (third and fourth year) students have travelled overseas during their years at university. This suggests that travelling overseas is not uncommon among the Japanese tertiary students.

## 4.2 INTENTION OF OVERSEAS TRAVEL

In order to measure the potential of the student market, it is also necessary to analyze and discuss the desire and future intention of the students to travel overseas. In this section, the intention of the students to travel overseas during the course of their studies at university and to make a graduation trip are discussed.

### 4.2.1 INTENTION OF OVERSEAS TRAVEL WHILE AT UNIVERSITY

Table 21 Intention of Travel While at University (%)

Q3 Would you like to travel overseas while you are a student at university?

		Yes Definitely intend to	Yes, if possible	No, not really	No, not at all	Don't Know	Total
Sex	Male	61.1	29.9	5.4	2.7	1.0	100.0 (298)
	Female	70.8	24.0	3.2	1.3	0.6	100.0 (154)
University year	1st year	69.9	23.7	3.2	1.9	1.3	100.0 (156)
	2nd year	64.5	29.0	5.4	1.1	0	100.0 (93)
	3rd year	69.4	23.5	4.1	1.0	2.0	100.0 (98)
	4th year	51.4	37.1	6.4	4.8	0	100.0 (105)
Total		64.4	27.9	4.6	2.2	0.9	100.0 (452)

Table 21 shows that the students have a strong desire for overseas travel and confirms the common perception held in the Japanese tourism industry. 92.3% of the students said that they wanted to travel overseas; only 6.8% did not. In comparison, the PMO survey (1988) showed that 84.3% of Japanese aged from 20 to 29 years old had a desire for



overseas travel, which was the highest percentage among all age groups. However, in the same study, only 29.2% of this age group said that they would definitely like to or intended to travel<sup>10</sup>, and the majority (55.1%) said they want to if they have an opportunity or if possible. On the other hand, the majority of the students sampled (64.4%) said that they intended to travel overseas. This indicates the great potential of the Japanese student market. Considering that only 31.6% of the students have travelled overseas (Table 14), it is not unrealistic to expect further growth in this market.

Female students showed a slightly stronger desire for overseas travel than did male students. 94.8% of the female students said they wanted to travel overseas (70.8% said they intended to travel, and 24.0% if possible or if they had the opportunity), compared with 91% of their male counterparts (61.1%, intend, to and 29.9%, if possible).

Only 51.4% of the fourth year students said that they definitely would like or intended to travel overseas. This is an understandable response as, at the time this survey was conducted (February, 1992), only two months remained before graduation, and thus the time available for them to travel overseas while they were still university students, was very limited. In addition, many students had to

---

<sup>10</sup> The original phrase in the Japanese questionnaire means something between "I would definitely like to" and "I intend to".

perform well at the final examination in mid-February if they were to travel overseas before the graduation. (There are usually supplementary examinations or additional work in March for students who do not perform well in the examination.) Students may also be required to attend training courses provided by their future employers. Therefore, it may be difficult for some fourth year students to travel overseas before graduation. This may be a major constraint on the future expansion of the student market.

**Table 22 Intention of Travel by Ability in Foreign Languages (%)**

	Yes, definitely intend to	Yes, if possible	No, not really	No, not at all	Don't Know	Total
Fluent/Quite well	69.8	20.8	1.9	7.5	0	100.0 (53)
Little/Not at all	63.7	28.8	5.0	1.5	1.0	100.0 (399)
Total	64.4	27.9	4.6	2.2	0.9	100.0 (452)

Interestingly, if not surprisingly, ability in a foreign language was not an important factor affecting the level of desire/intention to travel overseas. In the previous surveys (the PMO, 1988: Mainichi Shimbun, 1991), it was found that people with the ability to speak a foreign language had more positive attitude toward overseas travel. In the PMO's survey, 81.3% of the respondents who could speak a foreign language well said that they wanted to travel overseas in comparison with 55.4% who could not speak a little or at all. In this survey, however, 90.6% of the students who were confident of their ability in foreign

languages showed a positive attitude toward overseas travel, compared with 92.5% of students who were not confident having a positive attitude. While it is true that the proportion of those who said 'yes, definitely' was higher among the students with confidence in foreign languages (69.8%) than the other group, the proportion of the students who said 'not at all' was also higher. Overall, the students' desire to travel overseas was not significantly different among the two groups; the students wished to travel overseas regardless of their ability in foreign languages. This need not be a surprising result at all, as, although these students may not be able to communicate in a foreign language, they can read and write at least one foreign language, English, which is the first foreign language in Japanese secondary schools. Therefore, young Japanese may be different from older Japanese who did not learn any foreign languages in school or who have learned them but years ago. In addition, it is commonly known in Japan that, in recent years, Japanese can be used in major hotels, restaurants and shops in major destinations throughout the world, including Australia.

Table 23 Intention of Travel By Travel Experience (%)

		Yes, definitely intend to	Yes, if possible	No, not really	No, not at all	Don't Know	Total
With Travel Experience (Sub total)		77.6	20.3	0.7	0.7	0.7	100.0 (143)
	Travel experience since entering Uni.	81.0	18.1	0	0	1.0	100.0 (105)
	No travel experience since entering Uni.	68.4	26.3	2.6	2.6	0	100.0 (38)
Stay		72.7	27.3	0	0	0	100.0 (11)
No Travel experience		58.3	31.4	6.5	2.9	1.0	100.0 (309)
Total		64.4	27.9	4.6	2.2	0.9	100.0 (452)

It was clear that students with previous overseas experience had a stronger desire for overseas travel than those without experience. 77.6% of those who had travelled overseas before said they intended to travel overseas while they were at university, and 20.3% said they would like to if possible. More importantly, only 1.4% had a negative attitude toward overseas travel. This suggests that it is very likely that students who have already travelled overseas will do so again during their years at the university. In particular, those who have travelled since they entered the university showed a greater desire for overseas travel. All but one, who answered 'Don't Know', said that they wanted to travel overseas, and 81% of them intended to do so. Among students with overseas experience, those who have not travelled since they entered the university were less keen to travel overseas; 68.4% said that they intended to do so. Despite the relatively small size of the sample, students who have stayed overseas also

showed a strong desire for overseas travel. On the other hand, those without previous experience of overseas travel showed less keenness for it. While 89.7% of them showed a positive attitude, a significantly smaller percentage (58.3%) intended to travel overseas. In addition, 9.4 % did not want to travel overseas.

There are still psychological barriers against travelling overseas, according to the PMO survey (1987), such as fear for safety, problems associated with language and so on, although the barriers are not as high as they used to be. Thus, it is understandable that students who have not been overseas have a slight hesitation about overseas travel. Once they have travelled overseas and overcome the barriers, it is likely that they will become more enthusiastic and travel overseas again. On the other hand, it is also possible that the students who have been overseas are the ones who were more interested in travelling in the first place. Either way, it suggests that a significant proportion of the students are likely to travel overseas more than once while they are students at university. This is also supported by the previous findings (table 18) that show that nearly half of the third/fourth year students who have travelled overseas since they entered the university have done so twice or more.

TABLE 24 Preferred Destinations (%)

Q3-1 Which countries would you like to travel to (Multiple Answers)?

Sex		Total (Number)	Taiwan	Korea	H.K. Macao	Philippines	Thailand	Singapore	China	Other South East Asia	Guam Saipan	Hawaii
Sex	Male	100.0 (271)	16.2	19.2	23.6	8.5	18.8	22.1	40.6	16.2	21.0	26.9
	Female	100.0 (146)	11.6	14.4	23.3	4.1	19.9	28.8	31.5	17.8	21.9	29.5
University	1st year	100.0 (146)	11.6	15.8	27.4	4.8	14.4	22.6	34.2	15.1	19.2	28.8
	2nd year	100.0 (87)	6.9	13.8	19.5	3.4	16.1	24.1	31.0	18.4	19.5	28.7
	3rd year	100.0 (91)	16.5	22.0	20.9	11.0	22.0	28.6	48.4	20.9	25.3	23.1
	4th year	100.0 (93)	24.7	19.4	23.7	9.7	26.9	23.7	37.6	14.0	22.6	30.1
Language	Fluent/ Quite well	100.0 (48)	16.7	14.6	20.8	12.5	20.8	20.8	37.5	16.7	14.6	18.8
	A little/ Not at all	100.0 (369)	14.4	17.9	23.8	6.2	19.0	24.9	37.4	16.8	22.2	29.0
Experience	With Travel Experience	100.0 (140)	15.0	15.7	18.6	7.9	22.1	21.4	35.0	16.4	20.7	27.1
	Stay	100.0 (11)	18.2	9.1	9.1	0	18.2	0	18.2	0	9.1	9.1
	No Travel Experience	100.0 (277)	14.4	18.4	26.0	6.5	17.7	26.0	38.6	17.0	21.7	28.2
Total		100.0 (417)	14.6	17.5	23.5	7.0	19.2	24.5	37.4	16.8	21.3	27.8

Table 24 Preferred Destinations (Cont.)

		Total	South Pacific	Australia	New Zealand	U.S.A	Canada	Stb/Central America	Eastern Europe	U.S.S.R	Western Europe	Africa, Middle East	Around the World	Others
Sex	Male	100.0 (271)	33.2	60.9	38.0	62.0	54.2	20.7	16.2	32.5	60.9	23.2	23.6	3.8
	Female	100.0 (146)	33.6	65.8	37.7	61.6	61.6	14.4	21.2	32.9	84.2	34.2	37.0	4.1
Unmarried	1st year	100.0 (146)	33.6	67.1	38.4	60.3	58.2	19.9	19.2	34.2	78.8	25.3	30.1	6.2
	2nd year	100.0 (87)	33.3	60.9	37.9	63.2	59.8	19.5	16.1	23.0	65.5	29.9	18.4	1.1
	3rd year	100.0 (91)	31.9	59.3	40.7	63.7	57.1	14.3	20.9	42.9	64.8	26.4	35.2	3.3
	4th year	100.0 (93)	34.4	60.2	34.4	61.3	51.6	19.4	15.1	29.0	61.3	28.0	28.0	3.2
Language	Fluent/ Quite Well	100.0 (48)	20.8	54.2	35.4	58.3	52.1	16.7	14.6	27.1	60.4	14.6	33.3	6.3
	A little/ Not at all	100.0 (369)	35.0	63.7	38.2	62.3	57.5	18.7	18.4	33.3	70.2	28.7	27.6	3.5
	With travel Experience	100.0 (140)	30.7	57.9	37.1	58.6	53.6	18.6	21.4	30.7	73.6	23.6	39.3	4.3
	Stay	100.0 (11)	18.2	45.5	9.1	45.5	18.2	0	0	18.2	63.6	18.2	54.5	0
	No Travel Experience	100.0 (277)	34.7	65.0	38.3	63.5	58.5	18.4	16.2	33.6	66.8	28.9	22.7	3.6
Total		100.0 (417)	33.3	62.6	37.9	61.9	56.8	18.5	18.0	32.6	69.1	27.1	28.3	3.8

Table 24 shows that, overall, Europe was the most preferred destination among the students, attracting 69.1% of the total students who said that they want to travel overseas. Australia came second, attracting 62.6% of the students, closely followed by the USA and Canada, which attracted 61.9% and 56.8% respectively. New Zealand (37.9%) was a distant fifth, followed by China (37.4%). Europe, Australia and Canada were more popular among female students. Europe was far more popular than any other destinations among females; 84.2% wanted to travel to Europe. Male students found the USA and China more attractive than their female counterparts did. Again, this result follows the general trends in the Japanese travel market. In the PMO's survey (1988), when asked which countries they wanted to visit, 'Western Europe' was the most common answer among Japanese aged between 20 and 29 years old, accounting for 52.3% of the total. Oceania was the second followed by North America accounting for 44.9% and 37.5% respectively. This result was also supported by another survey conducted in 1989 by ABroad, one of the most popular travel magazines in Japan. The survey showed that New York was the most popular city among Japanese tertiary students, followed by Sydney and Paris, and that other cities in the USA, Europe and Australia were generally ranked high in popularity.

These figures, in comparison with table 19, reveal an interesting relationship between popularity and actual



visitation of various destinations. While a large number of students have actually been to the USA and Europe, and to a lesser extent, to Canada, reflecting the popularity of these areas as preferred destinations, fewer students have been to Australia, New Zealand, South Pacific and China, in contrast to their popularity as preferred destinations. On the other hand, destinations such as Hawaii, Guam/Saipan and most Asian countries have been visited by a large number of students although their popularity as preferred destinations are not so high.

Destinations such as Hawaii, Guam/Saipan, Hong Kong/Macau and Singapore have long been established in the Japanese market and have a reputation as the destinations for first-time overseas travellers. They have a superior competitiveness in the availability of Japanese speaking staff, price, wider ranges of products and services, and so on. It is also true that there are negative reputations among young Japanese as places which are over-commercialized and full of Japanese. This may affect the popularity of these places adversely as preferred destinations. However, in choosing the destinations, these places may attract the students due to their competitive advantages, particularly price over others.

The USA, Canada, and Europe also offer a diversity of the products, services and attractions and value for money, which is enough to capitalize on their popularity.

Australia and New Zealand, in contrast, have suffered one major disadvantage in competing against other major destinations - the price.

According to the industry sources in Japan, the international airfares between Japan and Australia were too high to be competitive against other long haul destinations such as Europe and the USA. This was not helped by the high price for domestic air travel within Australia compared with prices for those within the USA or even for international air travel within Europe. This subsequently resulted in the dilemma; if a package tour to Australia covers major cities and attractions, the price of the tour will become too expensive compared with one to Europe or the USA, and if the price is to be competitive, the tour will cover fewer places, and thus offer less value for money. Mr Miyazawa said that it was difficult, if not impossible, to sell package tours to Australia against the ones to Europe or the USA. When prices of the tours are same, people tend to choose to travel to Europe where they can visit five cities in three different countries or to the USA where they can enjoy places with a variety of attractions such as Disneyland and the Grand Canyon, as well as cities in Canada or Mexico<sup>11</sup>.

---

<sup>11</sup> A budget 15-day tour to Australia (Perth, Ayers Rock, Sydney, Gold Coast and Cairns) costs ¥388,000, compared to ¥299,000 for a similar 15-day tour to Southern Europe (7 cities in Greece, Italy, France and Spain) or ¥284,000 to the USA (Hawaii, Los Angeles, New York, Las Vegas and San Francisco) (Prices provided by Nippon Express Co, Ltd, in March, 1992)

Table 24 also shows the preferred destinations among the students in relation to their ability in foreign languages and travel experience. Being unable to speak foreign languages does not discourage the students from wanting to travel to any particular destinations. Rather, it seems that the students who have less confidence in their language ability are generally keener to travel to most destinations than those with the confidence. It is understandable that Hawaii, where one can survive without speaking a single word of English, was more popular (29%) among students who can not speak foreign languages than those who can (18.8%). Moreover, South Pacific Islands, Australia, Europe and Africa/ Middle East also enjoyed a significantly higher popularity among the students who can not speak foreign languages. This suggests that the inability to speak languages is not a significant factor affecting the initial decision on a travel destination.

**Table 25    The Purpose of Trips Intended by preferred destinations (%) (Selected Countries)**

Q3-2    Please indicate for what purpose you would like to travel to those countries?

	China	Hawaii	Australia	New Zealand	U.S.A.	Canada	U.S.S.R.	Europe
Holiday	83.3	97.4	87.7	92.4	60.9	70.9	80.1	81.3
V.F.R.	0.6	0	1.9	0	6.6	2.5	0.7	0.7
Training/learning	7.7	0.9	4.2	2.5	4.7	3.8	11.8	2.8
Study	4.5	0	8.4	6.3	35.7	24.9	7.4	21.2
Others	5.0	1.8	3.1	2.5	5.1	6.3	2.9	3.1
N.A.	1.3	1.7	2.5	1.9	1.8	1.7	0	2.4
Total (number)	100.0 (156)	100.0 (116)	100.0 (235)	100.0 (158)	100.0 (258)	100.0 (237)	100.0 (136)	100.0 (288)

Asked for what purpose they would like to travel to each of the countries stated, it was revealed that the students regarded the majority of countries as holiday destinations. For example, 97.4% of the students who said they wanted to visit Hawaii stated holiday as the purpose of the trip. However, there were several exceptions. While the majority (60.9%) of the students wanting to travel to the USA nominated 'holiday' as their purpose, more than one third (35.7%) said that they wanted to study there.<sup>12</sup> Canada and Europe also attracted students as the destinations for study, attracting 24.9% and 21.2% of the students respectively. One probable reason for this is that the students want to study English to improve their qualifications for better employment opportunities (Europe

<sup>12</sup>    The actual total exceeds 100.0% due to multiple answers.

includes the UK). Yet, other major English-speaking countries, Australia and New Zealand, were not as attractive destinations to the students for study as the three areas mentioned before. The author discovered several explanations for this from interviewing a group of students<sup>13</sup>. There is, in Japan, a perception that Australian English has a strong accent so that it cannot be understood outside Australia. Another perception is that to study abroad means to study in the USA or Europe which has been established since the nineteenth century (Keene, 1988). Moreover, American and British educational institutions, such as universities and colleges have been heavily promoting in Japan in order to attract Japanese students, and some have even established a campus in Japan. Although these are merely the observations of the author, Mr Miyazawa agrees that Australia is generally regarded as a destination for a holiday but not for study.

Interestingly, a significant proportion of the students who want to visit China (7.7%) and the USSR (11.8%), now the Commonwealth of Independent States, said that they wished to do so for training/learning purpose.

---

<sup>13</sup> The author conducted a series of interviews with students after they had filled in the questionnaire.

**Table 26    The Reason for not wanting to travel overseas.**

Q3-3 Please state the reasons why you would not like to travel overseas (Multiple Answers).

		No interest in Overseas travel	Prefer Domestic Travel	language	Safety & sanitation	Water/ Food	No money
Sex	Male	16.9	41.7	16.7	41.7	16.7	50.0
	Female	0	42.9	14.3	0	0	71.4
Total		12.9 (4)	41.9 (13)	16.1 (5)	32.3 (10)	12.9 (4)	54.8 (17)

		No time	Dislike Air Travel	Can't be bothered	Others	Total
Sex	Male	33.3	12.5	58.3	0	100.0 (24)
	Female	28.6	28.6	29.6	28.6	100.0 (7)
Total		32.3 (10)	16.1 (5)	51.6 (16)	6.5 (2)	100.0 (31)

Lack of money was the most common reason for not wanting to travel overseas. This is understandable, as some students receive little or no financial support from their parents, and have to work part-time in their spare time. 54.8% of the students who stated that they did not want to travel overseas, said that lack of money was the reason, while 51.6% (particularly male students) showed no enthusiasm, saying that they could not be bothered to do so. 'Prefer domestic travel or travel around Japan, first' (41.9%), 'lack of spare time' and 'fear for safety and sanitation' (32.3% each) were also common reasons. 'Language problems - not confident in language' was not as common as the reasons mentioned above. This may indicate that the language problem is not as major a hindrance to young Japanese in making the decision whether they travel overseas or not as has been perceived to be. However, it

may have an influence on how they travel overseas, such as whether or not to use package or group tours.

Interestingly, 41.7% (10 students) of the male students who said that they did not want to travel stated 'safety and sanitation' as one of their reasons, while no female student stated this as a reason. This confirmed a popular perception in the Japanese tourism industry that females are more active and enthusiastic, if not more adventurous, than males in relation to overseas travel.

4.2.2 INTENTION TO MAKE GRADUATION TRIPS

Table 27 Intention to Take Graduation Trips (%)

Q4 Would you like to or do you intend to take a graduation trip?

		Yes, definitely or intend to	Yes, if possible	No, not really	No, not at all	Don't Know	Total
Sex	Male	51.0	27.2	10.7	6.7	4.4	100.0 (298)
	Female	64.3	26.0	3.9	2.6	3.2	100.0 (154)
University Year	1st year	57.1	26.9	8.3	2.6	5.1	100.0 (156)
	2nd year	59.1	26.9	9.7	2.2	2.2	100.0 (93)
	3rd year	62.2	24.5	7.1	4.1	2.0	100.0 (98)
	4th year	43.8	28.6	8.6	13.3	5.7	100.0 (105)
Total		55.5	26.8	8.4	5.3	4.0	100.0 (452)

The majority of students showed a strong desire for graduation trips, the trips made by students around the graduation period, before they enter the workforce, as shown in table 27. Overall, 82.3% of the students expressed positive attitudes toward graduation trips. 55.5% intended to make a graduation trip and 26.8% would like to if possible. These figures suggested a great potential for the graduation trip market, in view of the number of students graduating from universities and colleges - about 700,000 each year. However, the students showed less interest in graduation trips than they did in overseas travel in general (see Table 21). Graduation trips, in the past, had a special status among students in that students only had the opportunity to travel overseas just before graduation, due to time and cost. It was common for students to save money



throughout their years in University or to borrow money from their future employers to travel overseas. However, according to Mr Hosomura of the JTB Global Club (Yomiuri Shimbun, 20/1/92), travelling overseas now is a common occurrence throughout university years and students no longer wait until graduation to travel overseas. This explains a certain loss of interest by students in graduation trips. Nevertheless, the students still showed a strong desire to make graduation trips. According to a recent survey conducted by Nippo Co, Japan<sup>14</sup>, graduation trips have still some special meaning for students; it is probably the last opportunity to travel overseas for a long period of time as they will not be able to do so once they start working; and it is also an important way of celebrating graduation and the end of student life. In addition, the Nippo survey revealed that more than 60% of students regarded 'the graduation trip' as one of the most important events in their student life.

In Table 27, more than one in five (21.9%) fourth year students said that they did not want to make a graduation trip. The survey by Nippo showed a similar result; 27.3% of the male fourth year students did not intend to make a graduation trip. As previously discussed, it is difficult for some fourth year students to travel overseas due to

---

<sup>14</sup> The sample of the survey consisted of 132 fourth year male students from 23 universities in the Tokyo area. The survey was conducted in December, 1991, using the interview method.

examinations or preparation for their employment. According to the Nippo survey the main reasons not to make graduation trips were, 'lack of money' (44.4%) and 'lack of time' (22.2%). Female students expressed more interest in making graduation trips (90.3% positive) than males (78.2%).

**Table 28 Intention to Take a Graduation Trip by Ability in Foreign Languages (%)**

	Yes, definitely or intend to	Yes, if possible	No, not really	No, not at all	Don't Know	Total
Fluent/Quite well	56.6	18.9	9.4	9.4	5.7	100.0 (53)
Little/Not at all	55.4	27.8	8.3	4.8	3.8	100.0 (399)
Total	55.5	26.8	8.4	5.3	4.0	100.0 (452)

Table 28 confirms the previous finding in the earlier part of this study (table 22), that the ability to speak and communicate in foreign languages did not make a significant difference in the students' attitudes to graduation trips. However, numerically, a greater proportion of the students without a command of a foreign language showed some degree of desire to make graduation trips than the students with the command did. Moreover, a slightly larger proportion of the students with the command in foreign languages showed negative attitudes towards travelling overseas (18.8%) than those without the commands (13.7%).

**Table 29 Intention to Take a Graduation Trip by Travel Experience (%)**

		Yes, definitely or intend to	Yes, if possible	No, not really	No, not at all	Don't Know	Total
With Travel Experience (Sub total)		67.8	19.6	6.3	4.2	2.1	100.0 (143)
	Travel experience since entering Uni.	72.4	17.1	4.8	3.8	1.9	100.0 (105)
	No travel experience since entering Uni.	55.3	26.3	10.5	5.3	2.6	100.0 (38)
Stay		63.7	18.2	9.1	9.1	0	100.0 (11)
No Travel experience		49.8	30.1	9.4	5.8	4.9	100.0 (309)
Total		55.5	26.8	8.4	5.3	4.0	100.0 (452)

Table 29 clearly shows that previous overseas experiences are important factors affecting the students' desire to take a graduation trip. While nearly half (49.9%) of the students without previous overseas travel experience said that they intended to make a graduation trip, more than two third (67.8%) of those with travel experience said they would make the trip. Students who have stayed overseas for three months or more, also showed a strong desire for overseas travel. This is also consistent with the finding in the earlier part of this study.

**Table 30    Ranking of Preferred Destinations for a Graduation Trip**

	First	Second	Third	Fourth	Fifth
Total	Europe (39.8%)	Australia (22.0%)	U.S.A. (18.3%)	Canada (18.3%)	New Zealand (10.8%)
Male	Europe (33.0%)	Australia (25.3%)	U.S.A. (22.8%)	Canada (15.9%)	New Zealand (12.9%)
Female	Europe (51.1%)	Australia (16.5%)	Canada (15.9%)	U.S.A. (10.8%)	Africa/Mid East, Round World (8.6%)

Table 30 shows interesting results in relation to preferred destinations for graduation trips (See appendix C for more detail). Destinations generally attracted significantly low percentages compared with table 24 which showed the preferred overseas destinations in general. This suggests that the students chose fewer preferred destinations in answering this question, which was more specific. In addition, there is a common concept of graduation trips as a 'once-in-a-life-time experience', and, therefore, students might have given careful consideration to choosing the most suitable answer.

Overall, Europe was the most popular destination for graduation trips (39.3%) followed by Australia (22.0%), and the USA and Canada (18.3%) shared third place. Europe was particularly popular among the female students, more than a half (51.1) of whom selected Europe as the preferred destination. This confirms the popular belief in the Japanese tourism industry, that Europe is the dominant destination for graduation trips. Moreover, the Nippo survey also indicated that Europe was the most popular

destination, accounting for 53.2%, followed by North America (48.1%) and Asia (24.7%). According to Mr Hosomura of JTB Global Club, the main reasons for Europe's popularity are cheap tour costs, largely due to the cheap airfares between Europe and Japan during the winter season (Yomiuri Shimbun, 20/01/92). It is also believed that Europe offer a wide range of attractions, both man-made and natural, in several countries, and thus value for money. Among male students, Australia (25.3%) and the USA (22.8%), which were the second and third most popular destinations, both attracted a significant proportion of the students. On the other hand, the female students did not regard destinations other than Europe as the destination for their graduation trips. The USA particularly, was not popular among female students, accounting for only 10.8% - fourth place behind Australia (16.5%) and Canada (14.4%). The USA is not regarded in Japan as a country where one can travel safely (Mainichi Shimbun, 1989), and this may be the reason for its unpopularity among female students. Although, Asian countries and the Pacific islands were not generally popular as destinations for graduation trips, among fourth year students, they were slightly more popular than among other students. It is believed that these areas are considered suitable alternatives for some students who do not have enough time and money but who do want to travel overseas as their graduation trips.

In conclusion, Japanese students have a strong desire for overseas travel (more than 90% of the students wanted to travel overseas while they are at university). In particular, students with overseas experience showed a stronger desire to travel overseas again than those without. The students also showed positive attitudes towards graduation trips. These findings indicate that the student market has a great potential for a future growth. Australia was among the most popular destinations among the students, together with Europe and the USA.

### 4.3 INTENTIONS OF TRAVEL TO AUSTRALIA

It is now obvious that the Japanese student market has great potential. This section discusses the general intentions of the students to travel to Australia. It is also necessary to consider their preferred modes of travel, such as travel arrangement, modes of transport and accommodation, and so on. Information on these needs and wants of Japanese students, will enable the Australian tourism industry to attract Japanese students to Australia more appropriately.

#### 4.3.1 INTENTIONS TO TRAVEL TO AUSTRALIA

Table 31 Intention to Travel to Australia (%)

Q5 Would you like or do you intend to travel to Australia?

		Yes, definitely or intend to	Yes, if possible	No, not really	No, not at all	Don't Know	Total
Sex	Male	35.6	52.3	8.7	2.7	0.7	100.0 (298)
	Female	47.4	44.8	4.5	2.6	0.6	100.0 (154)
University years	1st year	46.2	44.2	5.1	3.2	1.3	100.0 (156)
	2nd year	37.6	51.6	7.5	3.2	0	100.0 (93)
	3rd year	35.7	55.1	7.1	1.0	1.0	100.0 (98)
	4th year	35.2	51.4	10.5	2.9	0	100.0 (105)
Total		39.6	49.8	7.3	2.7	0.7	100.0 (452)

As table 31 shows, 89.4% of the students said that they wanted to travel to Australia. As is consistent throughout this study, female students showed stronger desires for travel to Australia. However, the proportion of the students expressing an intention to travel to Australia was not as high as that for overseas travel in general (Question

3) or graduation trips (Question 4). First year students were keener to travel to Australia than other students, and fourth year students were the least keen of all. As first year students have three more years at university, and thus more spare time, they tend to be more optimistic and enthusiastic for travel to every part of the world.

Despite the high popularity of Australia (see table 24 and table 30) as a preferred destination, the proportion of the students who said that they intended to travel to Australia seems to be quite small. Despite having been one of the most popular destinations among the Japanese (the country they want to visit most) since the mid 1980s (ATC, 1984), Australia has not attracted as many Japanese visitors as other major destinations such as the USA or Hawaii. According to Mr Miyazawa, the main reasons for this difference were the high cost of travel to Australia, the lack of direct flights and the lack of awareness of Australian tourism attraction among the Japanese public. However, awareness of Australia in Japan has increased dramatically and the number of direct flights have multiplied in recent years. In addition, the introduction of cheap airfares and packaged tours, in early 1992, to Cairns, the Gold Coast and Sydney may change the situation and more Japanese may visit Australia to take advantage of the cheap travel costs.<sup>15</sup>

---

<sup>15</sup> By June, 1992, the number of Japanese visiting Australia has increased dramatically over 1991, which set the record.



**Table 32    Intention to travel to Australia by Ability in Foreign Languages (%)**

	Yes, definitely or intend to	Yes, if possible	No, not really	No, not at all	Don't Know	Total
Fluent/Quite well	43.4	41.5	7.5	7.5	0	100.0 (53)
Little/Not at all	39.1	50.9	7.3	2.0	0.8	100.0 (399)
Total	39.6	49.8	7.3	2.7	0.7	100.0 (452)

**Table 33    Intention to Travel to Australia by Travel Experience (%)**

		Yes, definitely or intend to	Yes, if possible	No, not really	No, not at all	Don't Know	Total
With Travel Experience (Sub total)		46.9	46.2	5.6	1.4	0	100.0 (143)
	Travel experience since entering Uni.	48.6	44.8	5.7	1.0	0	100.0 (105)
	No travel experience since entering Uni.	42.1	50.0	5.3	2.6	0	100.0 (38)
Stay		18.2	81.8	0	0	0	100.0 (11)
No Travel experience		36.1	51.5	8.1	3.2	1.0	100.0 (309)
Total		39.6	49.8	7.3	2.7	0.7	100.0 (452)

Tables 32 and 33 showed that previous travel experiences had an important influence on the students' desire to travel to Australia, while their confidence in their foreign language ability had little influence. There were no significant differences between two groups with different ability in foreign languages. On the other hand, the students who had travelled overseas clearly showed a stronger desire to travel to Australia (46.9% intended and 46.2% wanted to) than those who had never been overseas (36.1% and 51.5%), a trend that is consistent throughout this study.

4.3.2 PREFERRED MODE OF TRAVEL TO AUSTRALIA

Travel Companions

Table 34 Travel Companions (%)

Q5-1 Who would you like to travel to Australia with?  
(Multiple Answers)

	Friends	Family	Alone	Others <sup>16</sup>	Don't know	Total
Male	74.5	1.5	25.6	3.5	7.3	100.0 (262)
Female	88.0	12.7	9.9	4.9	3.5	100.0 (142)
Total	79.5	5.4	20.0	4.0	5.9	100.0 (404)

The majority (79.5%) of the students wanted to travel with their friends. This was especially true for female students most of whom wanted some companions for their travel to Australia, and only 9.9% wished to travel alone. 88.0% of female students wanted to travel with their friends, and 12.7% wanted to travel with family. Among male students, travelling alone was more popular (25.6%) than among female students (9.9%), but travelling with friends was still popular, accounting for 74.5% of the male students.

This preference for travelling with friends or family rather than travelling alone is a common characteristics of the Japanese travel market as a whole. The PMO's survey (1988) showed that more than 90% of Japanese preferred to travel either domestically or internationally with one or

<sup>16</sup> 'Others' includes 'Neighbours' and 'colleagues'.

more companions. The IVS data (1990) also showed that 76% (the highest among the major markets to Australia) of the Japanese tourists to Australia travelled accompanied, 44% by their partner and 20% by friends or relatives, and only 24% travelled unaccompanied.

**Table 35 Travel Companions by the Ability in Foreign Languages (%)**

	Friends	Family	Alone	Others	Don't know	Total
Fluent/Quite well	77.8	4.4	24.4	6.7	0	100.0 (45)
Little/Not at all	79.7	5.6	19.5	9.2	6.7	100.0 (359)
Total	79.5	5.4	20.0	4.0	5.9	100.0 (404)

**Table 36 Travel Companions by Travel Experience (%)**

	Friends	Family	Alone	Others	Don't know	Total
With Travel Experience	78.2	7.5	19.5	1.5	5.3	100.0 (133)
Stay	54.5	9.1	27.3	0	18.2	100.0 (11)
No Travel experience	80.1	4.4	20.3	5.2	6.3	100.0 (271)
Total	79.5	5.4	20.0	4.0	5.9	100.0 (404)

One in four students who have stayed overseas preferred to travel alone. However, ability in foreign languages and previous travel experience had little influence upon the students' preference in the choice of travel companions. This result is contrary to the popular belief that the Japanese travel overseas in groups in order to minimize possible problems associated with language and unfamiliarity with foreign countries (Bailey, 1986: Morris, 1991). Regardless of the students' ability in foreign languages or previous travel experience, the majority preferred to travel

to Australia with friends. Therefore, Japanese do not travel in groups because of their lack of ability in foreign languages or unfamiliarity with foreign countries.

The IVS data (1990) confirmed that travelling in groups is still popular among the Japanese, despite the decrease in the size of the groups in recent years. There are certainly advantages to travel in groups, such as travel costs (which are significantly lower than travelling alone), safety, companionship, and so on. Gruburn (1983) suggested that this tendency to travel in groups was a part of Japanese culture which he called 'group culture'. Moreover, there is a concept of travel in Japan, described in the old saying 'Enjoying your journey is nothing but enjoying your travel companion'<sup>17</sup>. This group culture, which is claimed to be changing (Moren, 1983), still has strong influence upon Japanese tourists' behaviours. However, travelling with neighbours or colleagues (assuming that the students have part-time jobs), which has been common in Japan, was not popular among the students surveyed. In addition, 'travelling in large groups' for which Japanese tourists were once well-known throughout the world, is no longer popular, according to the IVS (1990). This suggests that the reason for Japanese students to travel with friends may simply be enjoyment of the trip.

---

<sup>17</sup> The old Japanese saying is "Tabi wa Michizure" which means that one's travel companion is the whole meaning of the journey.

The Length of the Trip

**Table 37 The Length of the Intended Trips to Australia (%)**

Q5-2 How long would you like to spend in Australia?

		4-5 days or less	About 1 week	About 10 days	About 2 weeks	About 3 weeks	About 1 month	more than 1 month	Don't Know	Total
S e x	Male	1.5	16.0	17.2	29.8	8.8	14.5	12.2	3.1	100.0 (262)
	Female	0.7	19.0	22.5	26.8	7.7	16.9	5.6	1.4	100.0 (142)
Total		1.2	17.1	19.1	28.7	8.4	15.3	9.9	2.5	100.0 (404)

Table 37 shows the length of time the students wished to spend in Australia. 'Two weeks' and 'Ten days' were the among the most popular length of trips to Australia, accounting for 28.7% and 19.1% respectively. A quarter (25.2%) of the students said that they wanted to spend one month or more. Male students wanted to travel for a longer period than their female colleagues. The average period of time students wished to spend in Australia was 18 days (table 38). In comparison, the average length of time the Japanese wanted to spend on their next overseas trip was 10 days, and the most popular length of trip was one week (the PMO, 1988). In 1991, Japanese tourists spent an average of 8.2 days abroad (the Ministry of Justice of Japan, 1992), and in Australia, they spent 8 days (IVS - 1991).

Industry sources agree that the students often spend around two to three weeks, significantly longer than average

Japanese tourists, when they travel overseas. However, in recent years, it has become popular that Japanese students travel overseas for a shorter period of time, between 7 and 10 days (Yomiuri Shimbun, 20/1/92). The reason for this is that more students now purchase package tours instead of self-organized trips, as package tours are much cheaper. Therefore, it is not clear whether the students actually travel for a long period of time. Nevertheless, this result indicates that the students are likely to travel for a longer period of time.

**Table 38 Length of the Intended Trips to Australia  
(Mean and Median)<sup>18</sup>**

		Mean	Median
Total		18.0	11.8
Sex	Male	18.8	12.1
	Female	16.6	11.1
	Fluent/Quite well	19.6	11.6
	Little/Not at all	17.8	11.8
	With Experience	19.3	13.4
	No Experience	17.4	11.8

Students with a command of foreign languages preferred to spend a longer period of time (19.6 days, mean) in Australia than those without (17.8 days, mean). However, the median figures suggested that there was no significant

<sup>18</sup> Mean and Median are calculated between 0 - 60 days

difference between the two groups.<sup>19</sup> Students with previous travel experience also wanted to travel to Australia for a longer period of time (19.3 days) than those without experience (17.8 days).

**Seasonality**

**Table 39 Preferred Season for Travel (%)**

Q5-3 Which season of the year would you like to travel to Australia? (Multiple Answers)

		Spring holiday	Golden weeks	June/ July	Summer holiday	Sep/Nov	Winter holiday	Jan/Feb	others	Total
Sex	Male	27.9	1.5	1.9	18.7	8.8	40.5	10.3	3.4	100.0 (262)
	Female	37.3	3.5	4.2	17.6	9.2	37.3	10.6	0.7	100.0 (142)
Total		31.2	2.2	2.7	18.3	8.9	39.4	10.4	2.5	100.0 (404)

The students considered the winter season in Japan (summer in Australia), a more suitable season for travel to Australia. The winter holiday (Christmas and New Year period), and spring holiday (end of February to end of March) were the most popular times for travel to Australia, attracting 39.4% and 31.2% of the students respectively. The summer holiday (two months between July and September), the longest holiday in the year, was not as popular as the winter. As Australia has established a strong reputation

<sup>19</sup> The mean figures were greatly affected by the existence of extreme variables - slightly more students with command of foreign languages wanted to spend more than one month (15.6%) than those without (9.2%). See appendix C for details.

as a beach resort (Mainichi Shimbun, 1990), it is understandable that the students do not want to travel to Australia during its winter. Moreover, the Golden Weeks,<sup>20</sup> one of the most popular seasons among Japanese to travel overseas was not popular among the students. Because they have more holidays than other Japanese, students may prefer to avoid the congestion of the peak holiday season.

**The Sources of Information**

**Table 40 The Sources of Information (%) (Selected)**

Q5-4 How would you plan for the trip to Australia and/or what sources of information would you rely upon (Multiple Answers)?

		Travel Agents	Airlines	Embassy	Travel Brochures	Travel Magazines	Paper Magazines	Word of Mouth	T.V. Radio	Total
Sex	Male	48.1	8.0	6.5	34.0	44.3	14.5	37.4	3.8	100.0 (262)
	Female	51.4	8.5	4.2	53.5	58.5	11.3	47.2	6.5	100.0 (142)
Total		49.3	8.2	5.7	40.8	49.3	13.4	40.8	4.7	100.0 (404)

About half (49.3%) of the students said that they would consult with travel agents in planning their trips to Australia. Travel magazines (49.3%), brochures (40.8%) and word of mouth (40.8%) were also considered to be major sources of information. When comparing these results with those of the PMO's survey (1988), students heavily relied

---

<sup>20</sup> The Golden Weeks are two weeks around early May, which include of four public holidays, and when usually business close for 10 days to two weeks.



upon Travel magazines and word of mouth, which accounted for only 14.9% and 28.6% respectively in the PMO survey.

Female students would gather information from more sources than male students. Although the IVS (1990) showed that the Japanese tourists first encountered Australia through television, students did not consider 'T.V. or Radio' as an important source of information. Travel agents and tour operators which produce brochures are more likely to have an influence on students when planning their travel to Australia.

This suggests that the emphasis of the marketing and promotion effort should be placed upon travel agents in order to attract Japanese students, rather than on Television or Radio advertisements.

**Table 41    The Sources of Information by Ability in Foreign Languages    (%)**

	Travel Agents	Airlines	Embassy	Travel Brochures	Travel Magazines	Papers Magazines	Words of Mouth	Total
Fluent/Quite well	40.0	6.7	13.3	33.3	42.2	13.3	35.6	100.0 (45)
Little/Not at all	50.4	8.4	4.7	41.8	50.1	13.4	41.5	100.0 (359)
Total	49.3	8.2	5.7	40.8	49.3	13.4	40.8	100.0 (404)

Interestingly, a greater proportion (13.3%) of the students with the ability to speak a foreign language said that they would go to the Australian embassy to collect information (table 41). Those who could not speak a foreign language were likely to gather more information from a

variety of sources, and also to rely more upon travel agents (50.4%) than those who could (40.0%).

Students without previous travel experience were also more likely to rely heavily upon travel agents (55.4%), compared with those with experience (36.8%).

Use of Packaged Tours

**Table 42    Use of Packaged Tours (%)**

Q5-5 Would you prefer the all inclusive packaged tours to ones which allow you free activities once you get to the destinations?

		Inclusive Package	Air and accommodation	Return air ticket only	Others	Total
Sex	Male	5.7	38.9	50.0	3.1	100.0 (262)
	Female	7.7	62.0	26.8	2.1	100.0 (142)
Total		6.4	47.0	41.8	2.7	100.0 (404)

All-inclusive tours, which are considered to be the most popular form of travel among Japanese, did not attract the interest of students regardless of sex, university year, language abilities or travel experiences. Only 6.4% said they would prefer to use an all inclusive tour. However, 47.0% said they would use package tours, which include a return flight and accommodation in Australia. Although there is a general belief that young people are more adventurous and that the popularity of packaged tours is declining, more than half (53.4%) of the students were

willing to use some form of packaged tours. According to Mr Hosomura of the JTB Global Club, packaged tours are increasingly popular among young people because of competitive pricing, convenience and ease of use (Yomiuri Shimbun, 20/1/92). Nevertheless, it is estimated that 60 to 70% of Japanese students travel independently, which is a much higher proportion than that of the Japanese travel market as whole.

While half of the male students wanted to purchase a return air ticket only and to organize their trip independently, only 26.8% of the female students wanted to do so. However, it is doubtful that these students would actually travel independently as it is more expensive at present, while prices of packaged tours are lower than those of return airfares, according to Mr Miyazawa of Recruit From A Inc.

**Table 43 Use of Package Tours by Ability in Foreign Languages (%)**

	Inclusive package	Air and accommodation	Return air ticket only	Others	Total
Fluent/Quite well	4.4	40.0	44.4	8.9	100.0 (45)
Little/Not at all	6.7	47.9	41.5	1.9	100.0 (359)
Total	6.4	47.0	41.8	2.7	100.0 (404)

Tables 43 shows the use of packaged tours by ability in foreign languages. The idea of using any type of packaged tour was slightly more popular among the students who can not speak a foreign language (54.6%) than among those who

can (44.4%). Another 44.4% of the students who can speak a foreign language said that they wanted to travel independently. However, this figure was not significantly higher than that of students who can not speak foreign languages (41.8%).

**Table 44 Use of Package Tours by Travel Experience (%)**

	Inclusive Package	Air and accommodation	Return air ticket only	Others	Total
With Travel Experience (Sub total)	4.5	39.8	48.9	3.8	100.0 (133)
Stay	0	9.1	54.5	18.2	100.0 (11)
No Travel experience	7.4	50.6	38.4	2.2	100.0 (271)
Total	6.4	47.6	41.8	2.2	100.0 (404)

The majority (58.0%) of students without overseas experience preferred to travel to Australia using some kind of packaged tour, while 38.4% said they preferred to purchase return tickets only (Table 44). In comparison, 48.9% of the students with travel experience said they preferred to buy return tickets only, while 44.3% preferred to use packaged tours.

Expenditure

Table 45 Expenditure Intended(%)

Q5-6 How much do you think you will spend for the trip to Australia, including spending money and souvenirs?

		Less than ¥200,000	¥200,000 -299,999	¥300,000 -399,999	¥400,000 -499,999	¥500,000 -599,999	¥600,000 or more	Don't Know	Total
S e x	Male	14.1	27.5	14.5	17.6	10.7	10.0	5.7	100.0 (262)
	Female	6.4	26.1	16.2	26.1	12.0	6.3	7.0	100.0 (142)
Total		11.4	27.0	15.1	20.5	11.1	8.7	6.2	100.0 (404)

Table 45 shows that the largest proportion (27.9%) of the students were willing to spend 200,000 to 299,999 yen (approx A\$ 2,200 to 3,300) on a trip to Australia, followed by the ¥400,000 to 499,999 expenditure bracket (20.5%). The average expenditure predicted was ¥394,986 (table 46)<sup>21</sup>. However, the median figure of ¥306,557 suggested that the majority of the students did not want to spend as much as the average figure indicated. Given the price of the return airfares between Japan and Australia (¥120,000-) and of the packaged tours to Australia (¥89,000-), the students expectations would not be so unrealistic.

More than a quarter of the female students were willing to spend ¥400,000 to 499,999, and the median figure of ¥336,957 indicated that they were willing to spend slightly more than the male students (¥288,158 median).

<sup>21</sup> The means and medians were calculated between ¥0 to 1,200,000.

**Table 46 Expenditure Intended (Mean and Median)**

		Mean (Y)	Median (Y)
Total		394,986	306,557
Sex	Male	394,534	288,158
	Female	398,106	336,957
	Fluent/Quite well	378,889	306,250
	Little/Not at all	397,156	306,604
	With travel experience	384,109	290,625
	No travel experience	400,600	312,222

Students without the previous overseas travel experience were willing to spend more (an average of ¥400,600) than those with the experience (average of ¥384,109). Moreover, the median figures confirm that the majority of the students with the experience wanted to spend less than ¥300,000. First year students (who were likely to have no previous travel experience) were also willing to spend more (average, ¥430,159 and median, ¥362,121) than other students. This may be due to their lack of knowledge in relation to the costs of overseas travel. They may expect that overseas travel costs more than it does in reality.

Mode of Transport

Table 47 Preferred Mode of Transport (%)

Q5-7 What mode of transport would you mainly like to use in Australia (Multiple Answers)?

		Domestic Air	Train	Bus/Coach	Private Vehicle (incl rented car)	Others	Don't Know	Total
Sex	Male	18.7	44.3	14.5	61.5	5.7	4.6	100.0 (262)
	Female	31.0	51.4	27.5	56.3	1.4	4.9	100.0 (142)
Total		23.0	46.8	19.1	59.7	4.2	4.7	100.0 (404)

Interestingly, table 47 shows that 'private vehicle' was the most popular mode of transport (59.3%) that the students wanted to use in Australia, followed by 'Train' (46.8%) and 'Domestic Air' (23.0%). 'Private vehicles' was slightly more popular among males. 'Domestic air' attracted 31% of female students, who tend to seek comfort and convenience. This result, students' preference for private vehicles and trains over domestic flights, is contrary to the way Japanese tourists currently travel - heavy use of domestic air service and organized tours. 'Domestic air' was extensively used by Japanese tourists (62% of the Japanese tourists in Australia used domestic air flights in 1990), while 'private vehicle' (17%) and 'train' (3%) were not as popularly used as domestic air (IVS, 1990).

It is understandable that 'train' was popular among the students, as the railway system in Japan is one of the most

efficient and effective modes of transport.<sup>22</sup> Australian railways, on the other hand, may not be a suitable nor desirable mode of transport for Japanese tourists who spend a shorter period of time in Australia. Compared with the railway system in Japan (such as the Bullet Trains), the one in Australia is not as effective nor efficient in covering long distances in a short time. However, it is possible that Australian railways, such as the 'Indian Pacific', 'The Ghan' or 'The Queenslander' can be promoted as attractions rather than simply as ways of transport, if they are well priced. At the time of writing, Austrail Passes are available for tourists from overseas at the price of \$650 for 30 days (economy). This is obviously overpriced as costs of tickets to travel around Australia (Cairns-Brisbane-Sydney-Melbourne-Adelaide-Perth) do not add up to the price of the pass (less than \$600 all together). Unless a tourist covers all these routes, plus Alice Springs in 30 days, the pass will not provide a good value for the tourist.

Private vehicles are also among the most popular modes of transport for domestic trips in Japan. Considering the strong preference for private vehicles, including rented vehicles, the potential of the student market for the Australian car rental market is great. However, it may be

---

<sup>22</sup> In 1991, railways were the second most popular mode of transport in Japan, accounting for 29.8% of the total passenger kilometres, following to private vehicles, accounting for 41.3% (Japanese White paper on Tourism - 1992)



necessary to develop proper promotion strategy, and additional services and products for the Japanese. These may include information services and/or a translation of rental contracts into Japanese. In addition 'Fly and drive', a combination of rented car service and domestic air, may attract the students, as domestic air is also popular among the students.

**Table 48 Preferred Mode of Transport by Ability in Foreign Languages (%)**

	Domestic Air	Train	Bus/Coach	Private Vehicle (incl rented car)	Others	Don't Know	Total
Fluent/Quite well	35.6	28.9	15.6	64.4	4.4	2.2	100.0 (45)
Little/Not at all	21.4	49.0	19.5	59.1	4.2	5.0	100.0 (359)
Total	23.0	46.8	19.1	59.7	1.1	4.4	100.0 (404)

Table 48 reveals the interesting findings that trains and bus/coaches were more popular among students who can not speak a foreign language, while domestic air flights and private vehicles were more popular among those who can. It is possible that this result is due to sampling, as there have been no significant differences in travel behaviour and preferences between the two groups in this study. It may be, however, due to the perceived degree of negotiation, human contact and total effort involved in using these modes of transport. For example, in Japan, trains are easier to use - one can buy a ticket to anywhere in Japan through vending machines - and everyone is familiar with using them. On the contrary, using an air service involves checking-in,

collecting luggage and so on, and people use air services less often than they use trains or buses. Renting a car also involves a greater degree of negotiation in establishing a contract and more effort in driving. Therefore, some students may be reluctant to use modes of transport which involve a greater degree of human contact.

However, this does not explain the result, as the students who preferred to use less complicated modes of transport were those who can speak a foreign language. Therefore, they are more capable of handling human contact and negotiations. Yet, there are trends that young Japanese, particularly females and those who are familiar with overseas travel, are increasingly purchasing products and services which provide convenience and ease - packaged tours - when they are travelling overseas (Yomiuri Shimbun, 20/1/92). Further research is necessary in the area of the relation between language ability and travel behaviour among Japanese tourists - in order to confirm this claim.

**Table 49 Preferred Mode of Transport by Travel Experience (%)**

	Domestic Air	Train	Bus/Coach	Private Vehicle (incl rented car)	Others	Don't Know	Total
With Travel Experience	24.1	41.4	18.8	63.2	3.8	4.5	100.0 (133)
Stay	36.4	36.4	27.3	63.6	9.1	9.1	100.0 (11)
No Travel experience	22.5	49.4	19.2	57.9	4.4	4.8	100.0 (271)
Total	23.0	46.4	19.1	59.7	4.2	4.7	100.0 (404)

Table 49 shows that private vehicles were again more popular among students with previous overseas travel

experience than among those without. Nonetheless, private vehicles were the most popular mode of transport among all groups of students.

**Mode of Accommodation**

**Table 50 Preferred Mode of Accommodation (%)**

Q5-8 Which types of accommodation would you mainly like to use (Multiple Answers)?

		City Hotels	Business Hotels	Motels	Resort Hotels	Y.H & YMCA	Camping	Others	Don't Know	Total
S e x	Male	16.0	19.1	24.8	19.1	37.0	12.2	5.0	5.3	100.0 (262)
	Female	22.5	27.5	16.9	44.4	28.9	9.9	1.4	3.5	100.0 (142)
Total		18.3	22.0	22.0	28.0	34.2	11.4	3.7	4.7	100.0 (404)

Budget accommodation such as 'Youth Hostels and the Y.M.C.A' were the most popular mode of accommodation among the students, attracting 34.2% (table 50), although they were not popularly used by Japanese tourists in Australia (IVS, 1990). It suggests that there is a potential that students may travel throughout Australia using this budget type of accommodation. This is supported by Pearce (1990) who revealed that there were a significant number of young Japanese travelling as backpackers. In particular, there is a special visa arrangement between the Australian and Japanese governments called a 'working holiday visa', which allows young Japanese (18 -25 years old) to travel and work in Australia for up to one year.

Budget accommodation, including motels, was more popular among the male students, who seemed to be more budget-conscious than their female counterparts. This result is consistent with the expenditure they were willing to outlay (male students wished to spend less than female students).

As has been the case for Japanese tourists in general, hotels with facilities (city hotels, business hotels<sup>23</sup> and resort hotels) attracted significant percentages of the students (table 48). These hotels, particularly resort hotels were even more popular among the female students. Resort hotels attracted 44.4% of the female students, compared with only 19.1% of the male students. It is believed in the Japanese tourism industry that young Japanese, particularly females, have become more beach and resort oriented in relation to overseas travel. Moreover, there were three basic elements required to attract young Japanese - comfort, convenience and cleanliness. According to Siew Hoon (1991: 17-18), the major focus among Japanese tourists in the 1990s will be "the 3Rs and 3Cs - R for the effective use of travel (Relaxation, Refreshment and Recreation) and C for the images sought in travel (Casual, Convenient and Comfortable)". Reflecting these trends, the young Japanese are increasingly using more expensive hotels in particular resorts, which can provide these elements.

---

<sup>23</sup> 'Business hotels' in Japan, mean budget hotels in general (prices ranging from ¥5,000 to 10,000, but do not mean accommodation used exclusively by business people.

There was little difference between the students with a command of a foreign languages and those without, in relation to preferred modes of accommodation. Previous travel experiences did not seem to have a significant influence on the students' preferences for accommodation, either. 'Motels' was slightly more popular among those with experience (27.1%) than those without (19.9%). It is possible that the word 'motel' which is heavily associated with the sex industry in Japan, may have given a negative impression to the students. Particularly, it is likely that the students who have not travelled overseas have no idea of 'motels' in Australia or other countries.

**Use of Pre-purchased Products**

**Table 51 Uses of Pre-purchased Vouchers/Coupons for Transportation or Accommodation in Australia (%)**

Q5-9 If you can pre-purchase passes, vouchers, round-trip tickets for transportation or for accommodation in Australia, would you like to use these passes?

		Transport only	Accommodation only	Both	Neither	Don't Know	Total
Sex	Male	24.0	10.3	27.5	9.5	28.6	100.0 (262)
	Female	12.0	14.8	45.8	4.2	23.2	100.0 (142)
Total		19.8	11.9	33.9	7.7	26.7	100.0 (404)

Nearly two thirds of the students (65.6%) said that they would use some type of pre-paid/purchased voucher or coupon as shown in table 51. One third said that they would

use vouchers/coupons for both transport and accommodation in Australia. In addition, only 7.7% rejected any use of these types of products. These types of pre-paid vouchers, coupons and passes, particularly for railway services are widely available and popular in Japan, since they eliminate inconvenience of travel arrangements while still giving users the freedom to arrange their own travel itinerary.

Various types of vouchers, coupons and passes are offered by Australian transport companies for domestic flights, interstate coaches, national railways and rental car services. In the accommodation sector, the Flag Inn motel chain offer pre-paid accommodation coupons. However, according to Mr Miyazawa of Recruit From A Inc., these products are not as well-known or popular in Japan as the European Rail-Pass. The above result indicates that there is potential demand for these types of products if they are marketed and promoted well in Japan.

Pre-paid vouchers/coupons were more popular among female students (72.8%) than among male students (61.8%). Almost half (45.8%) of female students said that they would use these products for both transport and accommodation. This also confirmed the belief in the industry that females pursue convenience and ease when travelling.

**Table 52 Uses of Pre-purchased Vouchers/Coupons for Transport or Accommodation in Australia by Ability in Foreign Languages (%)**

	Transport only	Accommodation only	Both	Neither	Don't know	Total
Fluent/Quite well	28.9	2.2	42.2	8.9	17.8	100.0 (45)
Little/Not at all	18.7	13.1	32.9	7.5	27.9	100.0 (359)
Total	19.8	11.9	33.9	7.7	26.7	100.0 (404)

Table 52 reveals that pre-paid vouchers/coupons were more popular among students with a command in a foreign languages than among those without. 73.3% of those who can speak a foreign language said they would use pre-paid vouchers/coupons, while 64.7% of those without said that they would use such products. As a slightly greater percentage of the students who can speak a foreign language preferred to travel independently (see table 43), the benefits of the products, in terms of convenience and freedom of travel, may attract them.

**Table 53 Uses of Pre-purchased Vouchers/Coupons for Transport or Accommodation in Australia by Travel Experience (%)**

	Transport only	Accommodation only	Both	Neither	Don't Know	Total
With Travel Experience	23.3	8.3	36.8	7.5	24.1	100.0 (133)
Stay	27.3	9.1	18.2	9.1	36.4	100.0 (11)
No Travel experience	18.1	13.7	32.5	7.7	28.0	100.0 (271)
Total	19.8	11.9	33.9	7.7	26.7	100.0 (404)

68.4% of the students with previous travel experience said that they would use pre-paid/purchased vouchers or

coupons, while a slightly smaller percentage (64.3%) of those without experience said they would (Table 53). Although a greater proportion (48.9%) of the students with experience preferred travelling independently than those without (38.4%), the pre-purchased vouchers/coupons did not seem to be attractive to this group.

**Multiple Destinations**

**Table 54 Multiple Destinations (%)**

Q5-10 Would you like to visit other countries when you are visiting Australia?

		Yes	No	N.A	Total
Sex	Male	62.6	35.5	1.9	100.0 (262)
	Female	59.9	37.3	2.8	100.0 (142)
Total		61.6	36.1	2.2	100.0 (404)

As shown in table 54, 61.6% of the students said that they wanted to visit other countries when they travel to Australia. Among those who expressed a desire to visit other countries, 82.9% nominated New Zealand, and 8.0%, the South Pacific Islands, such as Fiji (more details in Appendix C) The combination of Australia and New Zealand for multiple destination tours has been well developed by Japanese tour operators and will have a great potential for the student market in the future.



In summary, almost 90% of the Japanese student wanted to travel to Australia, suggesting that the student market offers a great opportunity for Australia. The results also shows that students have different travel preferences from the majority of the Japanese tourists. They preferred to travel alone or with friends, for a longer period of time. Private vehicle was the most popular mode of transport, while budget accommodation (Motels, and Youth Hostels and YMCA) was more popular than Hotels. All-inclusive packaged tours were not popular among the students. These findings suggest that the students prefer to travel around Australia independently.

4.4 IMAGES OF AUSTRALIA

The image of a destination is among the most important factors in tourism marketing. It is also an important determinant in making a travel destination choice. Therefore, it is important to evaluate the images of Australia held by the students in order to create an effective and efficient marketing strategy in the future.

Table 55 Images of Australia (Mean)

Q6 Please indicate what images of Australia do you have in relation to each pair of words listed below.

	Strongly agree		Neither			Strongly agree		
	3	2	1	0	-1	-2	-3	
	-----+-----+-----+-----+-----+-----							
Attractive			1.67					Unattractive
Young			1.26					Old
Familiar				0.31				Unfamiliar
Relaxing			1.79					Busy
Friendly			1.17					Unfriendly
Helpful				0.75				Indifferent
Refreshing			1.46					Gloomy
Casual				0.53				Formal
Suitable for young			1.48					Suitable for Middle aged
Suitable for shopping				-0.05				Unsuitable for shopping
Suitable for study				-0.32				Suitable for holiday
culture/traditional				-0.29				Lack of Culture/Tradition
Historical				-0.68				Lack of History
Urban				0.02				Countryside
Fashionable				-0.19				Unfashionable
Close				-0.91				Far
No time difference				0.72				Great time difference
Inexpensive				-0.15				Expensive to travel
Safe				0.64				Dangerous
Easy to travel				0.81				Difficult to Travel
Full of Nature			2.37					Lack of Nature
Attractive Beaches			1.65					Unattractive beaches
Suitable for Marine Sports			1.59					Unsuitable for Marine Sports
Mild/warm			1.34					Cold
Bright/sunny			1.62					Dark/cloudy

The students were asked to choose the more suitable word to describe the images of Australia from sets of two words with opposite meanings. Table 53 shows that, overall, the students had positive images of Australia, which is best described as 'Attractive'. There were broadly two areas in which positive images of Australia were held by the students: natural attractions, and lifestyle and atmospheres.

The students perceived Australia to be full of natural attractions, particularly attractive beaches, and to have a good climate, to be sunny and bright, warm and mild. Consequently, the students perceived Australia as a suitable place for marine sports, which are increasingly popular in Japan. There are also images of Australia associated with its lifestyle or atmosphere, that it is relaxing, casual, refreshing and young. The Australian lifestyle which is believed to be relaxing, slow and easy-going, seems to be attractive for Japanese. The students also had images of Australia as a safe, friendly and helpful country and thus an easy place for travel. These are also general images of Australia in Japan. According to a survey conducted by Mainichi Shimbun in 1990, Australia was among the highest ranking destinations as a safe country for travel, with helpful and kind people, and as a country with natural attractions and a friendly atmosphere (see appendix B).

There is great potential for Australia to benefit from these positive images in attracting Japanese tourists. These positive images are believed to be the prime attraction of Australia for Japanese tourists. The ATC's study (1990) revealed three distinct reasons for Japanese to travel to Australia:

1. Freedom (proximity to nature)
2. Relaxation (avoidance of routine)
3. Goal-directed (knowledge - understanding)

This result suggests that the positive images of Australia held by students are likely to attract the students to visit Australia. Moreover, according to a survey conducted by Mainichi Shimbun (1990), when Japanese were asked what types of overseas travel they would like to make, 'leisurely-stay', staying in one place for a longer period of time for relaxing, was the most popular answer, and Australia was ranked second after Hawaii as a destination suitable for this type of holiday. In the same survey, Australia was a popular destination for holidays, with a main purpose in participating in sports, familiarization with local lifestyles and customs and for holidays at beaches and mountains. All of these are popular types of holidays which Japanese want to take in the future.

However, Hawaii was directly competing with Australia in these areas (more importantly, Hawaii was ranked higher

than Australia). The survey revealed that Hawaii and Australia were direct competitors in the Japanese travel market. 12.6% of the Japanese tourists who visited Australia, and 9.1% who visited Hawaii, had considered the other as an alternative destination and had compared them before making a choice of destination (appendix B). Therefore, it is necessary for Australia to develop suitable products and services, and effective marketing strategies, in order to capitalize on the opportunity and to survive in a competitive environment.

Although, the students had positive images of Australia, they did not perceive Australia as a suitable place for shopping nor as a cheap place to travel around. They also had the impressions that the country did not have history, tradition or culture, which was not totally wrong. This may be why the students perceived that Australia was the place "unsuitable for study", and why Australia does not attract students to come for study purpose as discussed in the early part of this study. "Unsophisticated or unfashionable" was also a common perception of Australia among the students. There is a further view of Australia as far away from Japan (and hence, having a great time difference) despite the fact that Cairns is only seven hours away and the time difference is between one and two hours.

It may not be difficult to change some of these images of Australia held by the students, such as its great

distance and time difference from Japan. However, in some areas such as history, culture and tradition, it may be difficult to change the images. It is unlikely that Australia can compete with destinations such as China, France, Greece, and India, or Japan itself, as these places have hundreds of years of history. It may also be difficult for Australian cities to compete with cities such as Paris, Milan, London or New York, which are long-established centre of the Western culture and thus considered trendy/fashionable places in Japan. Australia should, therefore, try to enhance its positive images - its nature and lifestyle, while offering its cultural uniqueness, such as a multicultural society.

**Table 56 Cities and Places in Australia that the Students Wanted to Visit<sup>24</sup>**

	Total	Sydney	Melbourne	Adelaide	Cairns	Perth	Gold Coast	Ayers Rock
Awareness	100.0 (452)	97.8	89.8	49.3	39.6	52.7	84.1	56.6
Willingness	100.0 (452)	75.2	40.7	14.8	14.8	24.3	53.5	41.4
Percentages	100.0	76.5	44.3	27.4	34.1	42.0	62.4	67.6

	Total	Alice Springs	Canberra	Great Barrier Reef	Hobart	Brisbane	None
Awareness	100.0 (452)	21.9	85.6	57.7	6.6	57.5	1.3
Willingness	100.0 (452)	8.0	27.9	42.5	5.8	11.9	4.9
Percentage	100.0	27.3	31.8	70.5	43.3	18.1	N.A.

Table 56 indicates the students' awareness of and willingness to visit various Australian cities. Sydney was the best known city in Australia: 97.8% of the students had heard of it. Melbourne (89.8%), Canberra (85.6%) and the Gold Coast (84.1%) were also well known.

About half knew the names of the cities or places listed except Alice Springs and Hobart. Awareness of Hobart was extremely low, considering the fact that Tasmania hosted a popular Japanese film called 'Tasmania Story' in recent years. The students may have acknowledged the word 'Tasmania' if asked, but they did not seem to know that Hobart was in Tasmania. The film, which was claimed to be a

<sup>24</sup> 'Awareness' indicates the proportion of the students who have heard of the places/cities and 'Willingness', the proportion of the students who want to visit the places over the total number of sample, 453. 'Percentages' indicate the proportion of the students who want to visit the places among those who aware of the places.

major success in marketing Tasmania, did not raise general interest in Tasmania among the Japanese students.

Sydney was not only well known but also was the most popular city: 75.2% of the total number of students wanted to visit Sydney, and 76.5% of the students who had heard of Sydney said they wanted to visit. Sydney enjoyed both high awareness and willingness to visit among Japanese and also enjoyed the highest actual visitation rate by Japanese tourists. Although, the Great Barrier Reef, Ayers Rock and the Gold Coast were not as well known as Sydney, the students who knew or had heard of the places showed a strong desire to visit them. All of these places have "icons" such as the Sydney Opera House and high rise buildings along the beach, which have been featured in brochures, magazines and other media.

In contrast, fewer students wanted to visit Melbourne and Canberra, despite the fact that both cities enjoyed high awareness among the students. It is believed in the Japanese tourism industry that neither Melbourne and Canberra has any major attractions to draw the Japanese tourists. As Japanese tourists use domestic flights to move between cities within Australia, destinations must have attractions which can compensate for the costs associated with travel in order to attract Japanese tourists. For example, Ayers Rock is one of the most popular and well known Australian tourist attractions in Japan. However,



when they come to Australia, very few Japanese visit Ayers Rock due to the costs and time needed for travel. The Australia's Southern Tourism Promotion argues that Melbourne has enough attractions, but that lack of effective and efficient promotion is the cause of the problem. Nevertheless, the result of this study indicate that the Southern Australia, including Canberra did not attract as many Japanese visitors as Sydney or the Gold Coast, and the IVS data also confirm this result.

The students market can offer opportunities for less popular destinations, including Melbourne and Canberra, as students are more likely to travel for a longer period of time. Therefore, they may have more time to travel throughout Australia. However, in order to attract students, these destinations have to develop products and services as well as appropriate marketing strategy. In particular, Melbourne and Canberra are already well known among Japanese, the marketing strategy should aim to improve the products' images, but not to improve products'/places' awareness.

Overall, the results show that students have possitive images of Australia. In particular, Australia is perceived as a country, with beautiful nature, beaches and warm climate. Reflecting this, Gold Coast and Great Barrier Reef were popular among the students, while Sydney remains the most popular place in Australia.

***CHAPTER 5***

***CONCLUSION***

***AND***

***RECOMMENDATIONS***

## 5.1 CONCLUSION

Although the Japanese student market has recently attracted some attention in Australia, there is still very little information available on this market. There are, however, a general belief that students travel independently, for a longer period of time, and that the market is dominated by male students (Morris, 1991: ATC, 1990). The purpose of this study was to provide an overview of the Japanese student market, and to examine whether those beliefs represent actual characteristics of the market. In doing so, three research questions were set in the first chapter. Theses are: 1) Is the student market of importance in the Japanese outbound market? 2) What are the characteristics and trends of the student market; what are the students' needs and wants regarding overseas travel? 3) What is the potential of the student market for Australia?

It is clear that students constitute an important segment in the Japanese outbound market and have potential for further growth. The study revealed that more than one in three students were likely to/intended to travel overseas during their years at university, and were likely to become repeat travellers once they had travelled overseas. Given the number of tertiary students in Japan (2.6 million in 1990), the student market is too important to be ignored. In addition, the students showed strong desire for overseas travel, indicating great potential for further growth in

this segment of the market (92.3% of the students wanted to travel overseas while still at university). Being young, students are more leisure-oriented than older Japanese (PMO, 1986). More importantly, they are in a position to realize their desire for leisure activities, including overseas travel. This is probably best illustrated in the Nippo survey (1991) in which students are reported as expressing the fear that they would only have the opportunity to travel overseas while they were students. Graduation trips are therefore perceived by students as the last opportunity to travel overseas for a long period of time.

Australia was among the most popular destinations, together with Europe and the USA, for the Japanese students surveyed. Overall, 89.7% of the students expressed a desire to visit Australia. Several of the important findings in relation to their expectations of travel to Australia are listed below.

- (1) Almost a quarter of the students wished to travel with friends rather than alone.
- (2) The average length of time the students wished to spend in Australia was 18.0 days, significantly longer than the average of 8 days for the present Japanese tourists to Australia.

- (3) The students would rely heavily upon travel agents in planning their trips to Australia, rather than upon television and radio.
- (4) All-inclusive packaged tours were not popular.  
However, a package of return air travel and accommodation would be attractive to students.
- (5) Private vehicles and railways were preferred to domestic air services as the most popular modes of transport.
- (6) Budget accommodation (Motels, Youth Hostels, Y.M.C.A) were more popular among male students, while more female students preferred up-scale accommodation, particularly resort hotels.
- (7) Australia was perceived as a country with attractive nature resources and lifestyle, but without tradition, culture and history.

Although there can be no absolute certainty that the students will realize their desires and actually take a trip to Australia, the results of this study suggest that the student market offers great potential to Australia. More importantly, students have different travel preferences from the majority of the Japanese tourists. They want to travel

for a longer period of time, stay in budget accommodation and travel by private vehicle and/or train, but not to use all-inclusive packaged tours. If students are able to travel around Australia according to these preferences, this will have a great economic impact on broad areas of the tourism industry and, hence, on the Australian economy. Moreover, wider and more frequent contacts between Australian hosts and students will nurture the development of mutual understanding between the two countries at the grassroots level. By attracting Japanese students, Australia will benefit tremendously.

However, Australia will need to offer the products and services which Japanese students are seeking. In addition, efficient and effective marketing and promotion will be required if Australia is to capitalize on this opportunity. This study has shown that although it is among the most popular destinations for Japanese students, Australia has been less visited by them than have other destinations such as Hawaii, Hong Kong, the USA and Europe. This finding supports the popular views that Australia has not captured as large share of the Japanese outbound market as it should.

This study provides a clear picture of the student market, including students' preferred modes of travel. As Pearce (1986) also pointed out, in order to attract the students, Australia must be aware of their needs and wants

(for example, there are differences in the needs and wants of female and male Japanese students in relation to overseas travel). Therefore, different products and services must be offered if Australia is to attract both groups.

This study has also revealed that the students' ability to speak foreign languages did not affect their attitudes towards overseas travel as much as had been believed. Instead, previous travel experience was a more important factor affecting their attitudes. Here, the question arises of why Japanese tourists travel in groups or use packaged tours. In this study, the author has attempted to answer this question by drawing on opinions of the Japanese tourism industry. This study, however, did not deal with psychological factors influencing the travel behaviour. Further research is therefore needed in order to examine this important aspect.

In conclusion, the Japanese student market offers a great opportunity for Australia, and Australia can offer, in return, opportunities for Japanese students to experience its unique nature, culture and lifestyle. Unless this country takes the initiative and acts immediately to develop marketing plans to attract Japanese students, this opportunity may be lost forever.

## 5.2 RECOMMENDATIONS

Based upon the findings of this study, with the limitations stated in Chapter 1, the following recommendations are made:

1. As Australia has established its position as one of the most popular destinations, marketing plans should be aiming to promote specific tourism destinations, products and service, rather than to increase awareness of the country or of general tourist attractions.
2. Promotional efforts targeted at Japanese students should take place from fall to spring (in Japan) through Japanese travel agents and travel magazines, rather than T.V. commercials. Promotion should be focused more on travel agents, who have a strong influence upon students in their decision-making and who dominate the Japanese travel market in general.
3. It is doubtful whether the European and British parts of the Australian culture, history and tradition are attractive to Japanese students. If students are interested in European or British culture, they will elect to visit Europe and the UK, rather than Australia. Australia should therefore promote Australian culture on its own terms, highlighting such features as its multicultural society and distinctive lifestyle.



4. Male and female students have different attitudes towards overseas travel, including travel to Australia. For example, Promotional and advertising emphasis on 'convenience', 'cleanliness' and 'comfort' and 'beach resorts' may attract females, while 'budget' and 'self-organized' travel may attract males.
5. As students with previous overseas travel experience are keener to travel overseas again, this group of students must be targeted. The relevant information could be obtained through co-operation with Japanese outbound operators and airlines. Following the example of Japanese operators, sending follow-up letters and providing an information services for previous users/customers who have been to Europe and/or the USA, but not to Australia, could be useful.
6. Products and services should be developed on the basis the needs and wants of Japanese students. In particular, packaged tours which include only return airfares and accommodation would be attractive to them. These packages could be combined with pre-purchased vouchers/coupons for transport and/or accommodation.

7. Australian railways have great potential to become prime attractions, given the popularity of train travel among Japanese students. They should be developed and promoted as attractions rather than solely as a means of transport. The Austrail Pass may attract students if the price is reduced.
8. A combination of domestic flights and car rental services should be offered and promoted in Japan.
9. Most importantly, the prices of these products must be competitive with those offered by competitors such as Europe, the USA and Hawaii.

# **APPENDICES**

## **APPENDIX A**

1. Cover Letter and Questionnaire  
(Translation Into English)
2. Cover Letter and Questionnaire  
(Japanese Version)

## APPENDIX A - 1

### **The Cover Letter and Questionnaire (English Version)**

Note: I acknowledge that there are some Japanese words which can not be simply translated into English. For example, a Japanese word "Ryoko" means "to be away from home" and thus, does mean "travel", "visit", and also "trip" as a noun.

In translating the questionnaire and cover letter from Japanese into English, I placed more emphasis on keeping the original purpose of each question in mind rather than translating the questionnaire word by word.

At the time when this survey was conducted, the exchange rate between Japanese yen and Australian dollars was about A\$ 1 = 100 Japanese Yen.

Faculty of Business  
Victoria University of Technology  
Melbourne, Australia

January 1992

Dear Student

This is a request for assistance - from one student to another.

I am a graduate from the Yokohama City University and currently taking a Master of Business course at Faculty of Business, Victoria University of Technology, Australia. As part of the course, I am undertaking research on the travel preferences and behaviour of Japanese tertiary students. In order to obtain necessary information, regarding to students' attitudes toward overseas travel, in particular, to Australia, I am conducting a survey with assistance of the university staff.

Please be assure that the information is being gathered strictly for academic purpose and is being processed statistically. It will not be used for commercial gain and your confidentiality will be respected at all times. It will be appreciated if you can spare a few minutes and answer following questions.

If you have any further queries, please contact Professor Yuzo Kato in Department of Arts, or myself, on 831-3815.

I thank you in anticipation.

Yours faithfully

Atsushi Wada

## Questionnaire

[SURVEY FOR TRAVEL]

Feb / 1992

Q-1 Have you ever been overseas?

1. Yes                      2. No    (go to Q-3)

1-1 Was it a trip or stay?

1. Trip      2. stay more than 3 months (go to Q-2)

SQ ( person who answered '1. Trip')

How many times have you travelled overseas?

1. Once    2. Twice    3. Three times    4. Four times  
5. More than five times

Q-2 Have you travelled overseas since you entered university?

- 3) 1. Yes, I have (go to Q2-1) 2. No, I have not (go to Q-

2-1 How many times have you travelled?

1. Once    2. Twice    3. Three times    4. Four times  
5. More than five times

2-2 Which countries have you been to? Please circle the numbers preceding the countries you have visited.

1. Taiwan
2. South Korea
3. Hong Kong, Macau
4. Philippine
5. Thailand
6. Singapore
7. China
8. Other South Asian Countries (incl. Pakistan & India)
9. Guam, Saipan
10. Hawaii
11. South Pacific islands (Fiji, etc)
12. Australia
13. New Zealand
14. USA
15. Canada
16. South & Central America
17. Eastern Europe (Romania, Bulgaria, Czechoslovakia  
Poland, etc)
18. USSR
19. Europe
20. Africa, Middle East
21. Around the World
22. Others ( )

2-3 What was the purpose of the trip?

- |  |                                |
|--|--------------------------------|
| 1. Holiday/sightseeing                 | 2. Visit friends and relatives |
| 3. Club activities                     | 4. School Events/activities    |
| 5. Training/Learning                   | 6. Study                       |
| 7. Sports/Art Competition, Conferences |                                |
| 8. Others                              |                                |

Q-3 **(For everyone)** Would you like to travel overseas while you are a student at university?

- |                                 |             |
|---------------------------------|-------------|
| 1. Yes, definitely or intend to | (go to 3-1) |
| 2. Yes, if I have a chance      | (go to 3-1) |
| 3. Not really                   | (go to 3-3) |
| 4. No, not at all               | (go to 3-3) |
| 5. Don't know                   | (go to Q-4) |



3-1 Which countries would you like to visit? (Please choose as many as you want.)

3-2 And please indicate for what purpose you would like to visit those countries. Please circle appropriate number following to each countries

- |  |                                  |
|--|----------------------------------|
| 1 Holiday                                    | 2 Visiting Friends and Relatives |
| 3 Club Activities                            | 4 School Events                  |
| 5 Training/Learning                          | 6 Study                          |
| 7 Attend Sports Competition, Conference, etc |                                  |
| 8 Others                                     |                                  |

-----  
3-1 Countries you want to visit

	3-2 purpose of visit							
	1	2	3	4	5	6	7	8
1. Taiwan	1	2	3	4	5	6	7	8
2. South Korea	1	2	3	4	5	6	7	8
3. Hong Kong, Macau	1	2	3	4	5	6	7	8
4. Philippine	1	2	3	4	5	6	7	8
5. Thailand	1	2	3	4	5	6	7	8
6. Singapore	1	2	3	4	5	6	7	8
7. China	1	2	3	4	5	6	7	8
8. Other South Asian Countries (incl. Pakistan & India)	1	2	3	4	5	6	7	8
9. Guam, Saipan	1	2	3	4	5	6	7	8
10. Hawaii	1	2	3	4	5	6	7	8
11. South Pacific islands (Fiji, etc)	1	2	3	4	5	6	7	8
12. Australia	1	2	3	4	5	6	7	8
13. New Zealand	1	2	3	4	5	6	7	8
14. USA	1	2	3	4	5	6	7	8
15. Canada	1	2	3	4	5	6	7	8
16. South, Central America	1	2	3	4	5	6	7	8
17. Eastern Europe (Romania, Bulgaria, Czechoslovakia Poland,etc)	1	2	3	4	5	6	7	8
18. USSR	1	2	3	4	5	6	7	8
19. Europe	1	2	3	4	5	6	7	8
20. Africa, Middle East	1	2	3	4	5	6	7	8
21. Around the World	1	2	3	4	5	6	7	8
22. Others	1	2	3	4	5	6	7	8

3-3 Please state the reasons why you would not like to travel overseas? (Please choose as many as applicable)

1. Not interested in/do not like foreign countries
2. prefer to travel around Japan first
3. not confident in language ability
4. fear the safety and sanitation in foreign countries
5. foods/water are different in foreign countries
6. have no money
7. have no time, can not take holidays
8. do not like being on the plane
9. can not be bothered
10. other ( )
11. don't know

Q-4 (For everyone) Would you like to or do you intend to make a graduation trip (travelling during the holiday just before the graduation) or not?

1. Yes, definitely or intend to (go to 4-1)
2. Yes, if I have a chance (go to 4-1)
3. Not really (go to Q-5)
4. No, not at all (go to Q-5)
5. Don't know (go to Q-5)

4-1 Which countries would you like to visit?  
Please choose as many as you want.

1. Taiwan 2. South Korea 3. Hong Kong, Macau
4. Philippine 5. Thailand 6. Singapore 7. China
8. Other South Asian Countries (incl. Pakistan & India) 9. Guam, Saipan 10. Hawaii
11. South Pacific islands (Fiji, etc) 12. Australia
13. New Zealand 14. USA 15. Canada
16. South & Central America
17. Eastern Europe (Romania, Bulgaria, Czechoslovakia Poland, etc) 18. USSR 19. Europe
20. Africa, Middle East 21. Around the World
22. Others ( )

Q-5 (For everyone) About travelling to Australia, would you like to travel to Australia? Please choose one answer listed below.

1. Yes, definitely or intend to (go to 5-1)
2. Yes, if I have a chance (go to 5-1)
3. Not really (go to Q-6)
4. No, not at all (go to Q-6)
5. Don't know (go to Q-6)

5-1 Please answer the following questions assuming that you are travelling to Australia.

Who would you like to travel with? Please choose as many as you want.

1. Friends 2. Colleagues at work 3. Neighbours
4. Members of family or relatives 5. Alone
6. Others 7. Don't Know

5-2 How long would you like to spend in Australia?

1. up to 3 days 2. 4-5 days 3. about 1 week
4. about 10 days 5. about 2 weeks
6. about 3 weeks 7. about one month
8. more than one month 9. don't know

5-3 Which season of the year would you like to travel to Australia? (seasons in Japan)  
Please choose as many as you want.

1. Spring Holiday 2. Golden week 3. June - July
4. Summer Holiday 5. September - November
6. Winter Holiday 7. January - February
8. Others ( )

5-4 How would you plan for the trip and/or what sources of information would you rely upon? Please choose as many as you want.

1. Talk to travel agents 2. Talk to airlines
3. Talk to Embassy 4. Travel information centre, brochures
5. Travel and tourism magazines
6. Papers and general magazines
7. University cooperative 8. TV and Radio programs
9. Talk to friends
10. Others ( ) 11. Don't plan
12. Don't know

5-5 Would you prefer the all inclusive packaged tours to ones which allow you free activities once you get to the destination?

1. All inclusive packaged tours
2. Packaged tours with the return air ticket and accommodation
3. Tours only with a return air ticket
4. Others( )

5-6 How much do you think the trip would cost, including spending money and souvenirs?

1. less than 100,000 yen
2. 100,000 to 199,999 yen
3. 200,000 to 299,999 yen
4. 300,000 to 399,999 yen
5. 400,000 to 499,999 yen
6. 500,000 to 599,999 yen
7. 600,000 to 799,999 yen
8. 800,000 to 999,999 yen
9. 1,000,000 yen or more
10. Don't know

5-7 Which modes of transport would you mainly like to use within Australia? Please choose as many as you want.

1. Air
2. Train
3. Bus
4. Private Vehicle (including Rent a Car)
5. others ( )
6. Don't know

5-8 Which types of accommodation would you mainly like to use? Please choose as many as you want.

1. City Hotels ( above 10,000 yen a night)
2. Business Hotels ( 7,000 - 10,000 yen a night)
3. Motels ( 3,000 - 7,000 yen a night)
4. Resort Hotels
5. Youth Hostels, YMCA (1,000 - 3,000 yen, shared room)
6. Camping Grounds
7. Others ( )
8. Don't know

5-9 If you can, in Japan, pre-purchase passes, vouchers round trip tickets for transportation (Bus, Train, etc), or vouchers for accommodation in Australia, would you like to use these vouchers?

1. only for transport
2. only for accommodation
3. use both
4. use neither
5. Don't know

5-10 Would you like to visit other countries when you are visiting Australia?

1. Yes (state country name )
2. No

Q-6 (For Everyone) There are pairs of words listed below to describe the images of Australia. Please indicate what images of Australia do you have in relation to each pair of words.

	1	2	3	4	5	6	7	
	V	Q	F	N	F	Q	V	
	e	u	a	e	a	u	e	
	r	i	i	i	i	i	r	
	y	t	r	t	r	t	y	
		e		h		e		
				e				
				r				
1. Young	---	+	---	+	---	+	---	Old
2. Familiar	---	+	---	+	---	+	---	Unfamiliar
3. Attractive	---	+	---	+	---	+	---	Unattractive
4. Full of Nature	---	+	---	+	---	+	---	Lack of nature
5. Far	---	+	---	+	---	+	---	Close
6. Good for shopping	---	+	---	+	---	+	---	Bad for shopping
7. Refreshing	---	+	---	+	---	+	---	Gloomy
8. Historical	---	+	---	+	---	+	---	Lack of history
9. Masculine	---	+	---	+	---	+	---	Feminine
10. Cultural, Traditional	---	+	---	+	---	+	---	Lack of tradition
11. Safe	---	+	---	+	---	+	---	Dangerous
12. Urban	---	+	---	+	---	+	---	Countryside
13. Attractive beaches	---	+	---	+	---	+	---	Unattractive beaches
14. Learning	---	+	---	+	---	+	---	Leisure
15. Helpful	---	+	---	+	---	+	---	Indifferent
16. Easy to travel	---	+	---	+	---	+	---	Difficult to travel
17. No time difference	---	+	---	+	---	+	---	Great time difference
18. Friendly	---	+	---	+	---	+	---	Unfriendly
19. Suitable for Marine sports	---	+	---	+	---	+	---	Unsuitable for Marine sports
20. Relaxing	---	+	---	+	---	+	---	Busy
21. Cheap to travel	---	+	---	+	---	+	---	Expensive to travel
22. Warm/mild climate	---	+	---	+	---	+	---	Cold climate
23. Casual	---	+	---	+	---	+	---	Formal
24. Sophisticated	---	+	---	+	---	+	---	Unsophisticated
25. Bright/sunny	---	+	---	+	---	+	---	Dark/cloudy
26. Suitable for young	---	+	---	+	---	+	---	Suitable for Middle aged
27. Suitable for Honeymoon trips	---	+	---	+	---	+	---	Suitable for elderly
28. Suitable for Family holiday	---	+	---	+	---	+	---	Suitable for holiday with friends

Q-7 (For Everyone) Please indicate all the name of cities or place in Australia that you have ever heard.

1. Sydney 2. Melbourne 3. Adelaide 4. Cairns
5. Perth 6. Gold Coast 7. Ayres Rock 8. Alice Springs
9. Canberra 10. Great Barrier Reef
11. Hobart 12. Brisbane

7-1 Please indicate the names of cities and places that you would like to visit. (Multiple answer)

1. Sydney 2. Melbourne 3. Adelaide 4. Cairns
5. Perth 6. Gold Coast 7. Ayres Rock 8. Alice Springs
9. Canberra 10. Great Barrier Reef
11. Hobart 12. Brisbane

Q-8 Please answer the questions listed below in order to analysing the data.

8-1 Sex [ 1. Male 2. Female ]

8-2 Univ. Year [ 1. First Year 2. Second Year  
3. Third Year 3. forth Year ]

8-3 Faculty [ 1. Business 2. Economic  
3. Arts 4. Science  
5. Medicine ]

8-4 Ability to speak foreign languages  
[ 1. Fluent - able to speak without any difficulties  
2. Able to communicate and understand for travelling and daily life  
3. A little  
4. No / speak hardly any words ]

8-5 Place where you live  
[ 1. Stay with Parents  
2. Away from Home ]

8-6 Monthly Disposable Income (After living expenses and tuition fees)

- [ 1. about 30,000 yen 2. about 40,000 yen  
3. about 50,000 yen  
4. about 60,000 - 70,000 yen  
5. about 80,000 - 90,000 yen  
6. about 100,000 yen  
7. about 120,000 - 130,000 yen  
8. about 150,000 yen  
9. about 170,000 - 180,000 yen ]

Thank you very much for your time!

調査ご協力のお願い

拝啓

寒い日が続いていますが、お元気でお過ごしのことと存じます。

さて、本日は突然ですが、調査にご協力いただきたく、お願い申しあげる次第です。

現在、私は（オーストラリア、ビクトリア工業大学、経営学部、修士課程在学）日本の大学生のオーストラリアへの志向がどの程度かを研究していますが、この度その一環として旅行をとりあげました。旅行を通して、オーストラリアへの心理的マインドを測ろうとするものであります。つきましては、母校横浜市立大学の諸先生方の協力をいただき、その実態の調査を企画いたしました。

本調査は、すべて学究を目的としており、結果は統計的に処理されますので、記入内容がそのまま外部へ出たり、御迷惑をおかけすることは決してありません。以上、主旨をお汲みとりいただき、御多忙のところ恐縮ですがよろしくご協力の程をお願い申し上げます。

敬具

1992年1月

和田 淳

Faculty of Business  
Victoria University of Technology  
Melbourne, Australia

連絡先

横浜市港南区港南台1-35-23

TEL 831-3815

旅行についての調査

Q1 あなたはこれまで外国へ行ったことがありますか。

1 ある 2 ない

1-1 それは旅行ですか。それとも滞在ですか。

1 旅行 2 3か月以上の滞在

SQ (旅行の方に) 何回しましたか。

1 1回 2 2回 3 3回 4 4回 5 5回以上

Q2 ところで大学入学後に海外旅行をしましたか。

1 旅行した 2 しない

2-1 何回旅行しましたか。

1 1回 2 2回 3 3回 4 4回 5 5回以上

2-2 行った国はどこですか。下の欄であてはまる番号すべてに○をつけて下さい。

1 台湾 2 韓国 3 香港、マカオ  
4 フィリピン 5 タイ 6 シンガポール  
7 中国 8 その他の東南アジア (バキスタン、インドを含む)  
9 グアム、サイパン 10 ハワイ  
11 南太平洋諸島 (フィジーなど)  
12 オーストラリア 13 ニュージーランド  
14 米国 15 カナダ 16 中南米  
17 東欧諸国 (ポーランド、チェコスロヴァキアなど)  
18 ソ連 19 ヨーロッパ  
20 アフリカ、中近東 21 世界一周  
22 その他 ( )

2-3 旅行の目的は何でしたか。

1 観光 2 家族・友人訪問  
3 クラブ活動 4 学校行事  
5 研修参加 (個人) 6 留学  
7 海外の国との大会参加  
8 その他 ( )

Q3 (全員の方に) あなたは大学時代に海外旅行をしてみたいと思いますか。それとも思いませんか。下記の項目であてはまる番号をひとつ選んで○で囲んで下さい。

1 ぜひ行ってみたい 2 チャンスがあれば行ってみたい 3 それほど行きたいとは思わない 4 行きたいと思わない 5 わからない

3-1 どこでこの国へ行ってみたいと思いますか。いくつでも番号に○をつけて下さい。

3-2 またその旅行の目的もお知らせ下さい。

3-1 行ってみたい国	1 観光	2 家族・友人訪問	3 クラブ活動	4 学校行事	5 研究	6 留学	7 海外大会	8 その他
1 台湾	1	2	3	4	5	6	7	8
2 韓国	1	2	3	4	5	6	7	8
3 香港、マカオ	1	2	3	4	5	6	7	8
4 フィリピン	1	2	3	4	5	6	7	8
5 タイ	1	2	3	4	5	6	7	8
6 シンガポール	1	2	3	4	5	6	7	8
7 中国	1	2	3	4	5	6	7	8
8 その他の東南アジア (バキスタン、インドを含む)	1	2	3	4	5	6	7	8
9 グアム、サイパン	1	2	3	4	5	6	7	8
10 ハワイ	1	2	3	4	5	6	7	8
11 南太平洋諸島 (フィジーなど)	1	2	3	4	5	6	7	8
12 オーストラリア	1	2	3	4	5	6	7	8
13 ニュージーランド	1	2	3	4	5	6	7	8
14 米国	1	2	3	4	5	6	7	8
15 カナダ	1	2	3	4	5	6	7	8
16 中南米	1	2	3	4	5	6	7	8
17 東欧諸国 (ポーランド、チェコスロヴァキアなど)	1	2	3	4	5	6	7	8
18 ソ連	1	2	3	4	5	6	7	8
19 ヨーロッパ	1	2	3	4	5	6	7	8
20 アフリカ、中近東	1	2	3	4	5	6	7	8
21 世界一周	1	2	3	4	5	6	7	8
22 その他	1	2	3	4	5	6	7	8

3-3 行きたいと思わない、のほどな理由からですか。下記の項目であてはまる番号すべてに○をつけて下さい。

1 外国には暇味がない・外国は嫌いだである  
2 まず国内旅行で行きたいところがある  
3 言葉に自信がない  
4 外国の治安や衛生状態に不安がある  
5 外国は食べ物や水が違う  
6 お金がない  
7 海外旅行に行く時間がない・休みが取れない  
8 飛行機が嫌いである  
9 めんどくさい  
10 その他 ( )  
11 わからない



Q 4 (全員の方に) 卒業旅行 (卒業の年の1月から3月の間の記念旅行) をしてみたいという気持はありますか。それともありませんか。

4-1 どの国へ行ってみたいですか。

1 ぜひ旅行したい 2 できればしてみたい 3 それほどこしたいとは思わない 4 しない 5 わからない

Q 5へ

1 台湾 2 韓国 3 香港、マカオ 4 フィリピン 5 タイ 6 シンガポール 7 中国  
8 その他の東南アジア (タイ、インドを含む) 9 グアム、サイパン 10 ハワイ 11 南太平洋 (フィジーなど)  
12 オーストラリア 13 ニュージーランド 14 米国 15 カナダ 16 中南米 17 東欧諸国 (ポーランド、チェコ、スロバキアなど)  
18 ソ連 19 ヨーロッパ 20 アフリカ、中近東 21 世界一周 22 その他 ( )

Q 5 (全員の方に) オーストラリアへの旅行について伺います。オーストラリアへ行ってみたいと思いますか。下記の中からあてはまるものをひとつ選んで下さい。

1 ぜひ行ってみたい 2 チャンスがあれば行ってみたい 3 それほど行きたいとは思わない 4 行きたいとは思わない 5 わからない

Q 6へ

5-1 オーストラリアへ行くとしてお答え下さい。  
どなたと行くことになりそうですか。  
あてはまるものをいくつでもあげて下さい。

1 友人・知人 2 職場や仕事関係の人  
3 地域の人 4 家族や親戚 5 一人で  
6 その他 7 わからない

5-2 旅行期間はどのくらいがよいでしょうか。

1 3日以内 2 4～5日 3 1週間くらい  
4 10日くらい 5 2週間くらい  
6 3週間くらい 7 1か月くらい  
8 1か月以上 9 わからない

154

5-3 季節としてはいつといつがよいと思いますか。いくつでも結構です (日本の季節で)

1 春休み 2 夏休み 3 6～7月  
4 夏休み 5 9月～11月 6 冬休み  
7 1～2月 8 その他 ( )

5-4 計画を立てる場合、どのようなものを参考にしますか。いくつでも結構です。

1 旅行業者と相談 2 航空会社と相談  
3 大使館などに相談 4 案内所やパンフレット  
5 旅行専門誌 6 新聞記事、一般雑誌  
7 大学生協 8 テレビ、ラジオの番組  
9 友人・知人の話 10 その他 ( )  
11 特に立てない 12 わからない

5-5 旅行がすべてセットになったもの、目的の地へ行動が自由なもの、どちらが好きですか。

1 セットになったもの  
2 往復の飛行機と宿がセットになったもの  
3 往復の飛行機のみセット  
4 その他 ( )

5-6 旅行費用はどれくらい考えられますか。みやげ、小遣いを含めてお答え下さい。

1 10万円未満 2 10～20万円未満  
3 20～30万円未満 4 30～40万円未満  
5 40～50万円未満 6 50～60万円未満  
7 60～80万円未満 8 80～100万円未満  
9 100万円以上 10 わからない

5-7 オーストラリア国内では主にどのような交通手段を利用したいですか。いくつでもあげて下さい。

1 飛行機 2 列車 3 バス  
4 自動車 (レカーを含む) 5 その他 ( )  
6 わからない

5-8 主にどのような宿泊施設を利用したいですか。いくつでもあげて下さい。

1 シティホテル (1泊1万円以上)  
2 ビジネスホテル (7000～1万円)  
3 モーターホテル (3000～7000円) 4 リゾートホテル  
5 ユースホテル、YMCA (相部屋1000～3000円)  
6 キャンプ場 7 その他 ( )  
8 わからない

5-9 現地の交通手段 (列車、バスなど) のクーポン、周遊券、バスや宿泊券が日本で購入できるとしたらあなたは利用したいと思いますか。

1 交通手段のみ利用 2 宿泊券のみ利用  
3 両方利用 4 どちらとも利用しない  
5 わからない

5-10 オーストラリア旅行と一緒に他の国も訪問したいとお考えですか。

1 はい 2 いいえ  
国名

Q 6 [全員の方に] オーストラリアのイメージ項目が対になってあります。それぞれの項目についてあなたのイメージがどの程度か、あてはまる箇所に○をつけて下さい。

1	非	1	2	3	4	5	6	7	
2	常	か	や	や	ど	や	か	非	
3	に	な	り	や	ち	や	な	常	
4					え				
5					な				
6					も				
7					い				
8					い				
9					い				
10					い				
11					い				
12					い				
13					い				
14					い				
15					い				
16					い				
17					い				
18					い				
19					い				
20					い				
21					い				
22					い				
23					い				
24					い				
25					い				
26					い				
27					い				
28					い				

1	若	2	な	3	め	4	か	5	し
2	な	じ	み	の	う	す	い		
3	魅	力	あ	る	い				
4	豊	か	な	自	然	力			
5	遠								
6	ホ	ッ	ピ	ン	グ	が	楽	し	め
7	さ	わ	や	か	な				
8	歴	史	が	あ	る				
9	男	性	的						
10	伝	統	文	化	が	あ	る		
11	安	全							
12	都	市	的						
13	海	が	魅	力	的				
14	学	校							
15	親	戚							
16	旅	行	が	し	や	す	い		
17	時	差	が	な	い				
18	親	し	み	が	も	て	る		
19	ホ	ッ	ピ	ン	グ	が	楽	し	め
20	の	ん	び	り					
21	旅	行	費	用	が	安	い		
22	気	候	温	暖	な				
23	気	候	軽	な					
24	洗	練	さ	れ	た				
25	明	る							
26	若	者	向	き					
27	新	婚	旅	行	向	き			
28	家	族	旅	行	向	き			

Q 7 [全員の方に] オーストラリアの都市名、地名でああなたが聞きになったことのあるものをすべて選んで下さい。

1	シドニー	2	メルボルン	3	アデレード	4	ケアンズ
5	パース	6	ゴールドコースト	7	エアーズロック		
8	アリススプリング	9	キャンベラ	10	グレートバリアリーフ		
11	ホバート	12	ブリスベン				

7-1 あなたが行ってみたい都市名、地名をお知らせ下さい。

1	シドニー	2	メルボルン	3	アデレード	4	ケアンズ
5	パース	6	ゴールドコースト	7	エアーズロック		
8	アリススプリング	9	キャンベラ	10	グレートバリアリーフ		
11	ホバート	12	ブリスベン				

Q 8 分析に必要ですので、以下の質問にお答え下さい。

8-1.	性	1 男		2 女						
8-2.	学 年	1 1 年	2 2 年	3 3 年	4 4 年					
8-3.	専 攻	1 経営	2 経済	3 文	4 理	5 医				
8-4.	外国語はどの程度話せますか。	1 不自由なく話せる	2 日常会話が可能	3 少しは話せる	4 ほとんど話せない					
8-5.	お住まい	1 自 宅		2 自宅外						
8-6.	1か月の小遣い(生活費、学費を除く)	1 3万円程度	2 4万円程度	3 5万円程度	4 6～7万円程度	5 8～9万円程度	6 10万円程度	7 12～13万円程度	8 15万円程度	9 17～18万円程度

お忙しいところ、ありがとうございました。

## APPENDIX B

1. The number of Japanese Tourists by Destination
2. Destination Images (Mainichi Shimbun, 1990)
3. Alternative Destination Study (Mainichi Shimbun, 1990)
4. Overseas Travel One Would Like to Make  
(Mainichi Shimbun, 1990)

## APPENDIX B - 1

### The Number of Japanese Tourists by Destinations

	1989		1990		1991	
	Number	Change(%)	Number	Change(%)	Number	Change(%)
Korea	1,379,523	24.7	1,460,291	5.9	1,455,090	-0.4
China	358,828	-39.6	463,265	29.1	640,990	38.3
Taiwan	962,179	4.9	914,484	-5.0	825,985	-9.7
Hong Kong	1,176,189	-5.2	1,331,677	13.2	1,259,837	-5.4
Singapore	841,371	23.3	971,637	15.5	871,313	-10.3
Thailand	546,967	21.8	635,555	16.2	N.A.	N.A.
Australia	349,600	-0.8	479,900	37.3	528,500	10.1
New Zealand	97,322	3.8	107,840	10.8	114,718	6.4
U.S.A	3,080,396	21.6	3,231,495	4.9	3,319,934	2.7
(Hawaii)	1,319,340	8.4	1,439,710	9.1	*1,350,000	-6.2
(Guam)	555,748	12.6	637,569	14.7	582,270	-8.7
Canada	387,000	19.4	412,537	6.6	N.A.	N.A.
France	1,256,708	62.7	1,264,895	0.7	N.A.	N.A.
Italy	456,700	18.7	636,961	39.5	N.A.	N.A.
Germany	762,554	22.4	841,462	10.3	N.A.	N.A.
Switzerland	472,268	18.7	497,666	5.4	415,016	-16.6
Spain	216,535	27.2	243,775	12.6	N.A.	N.A.

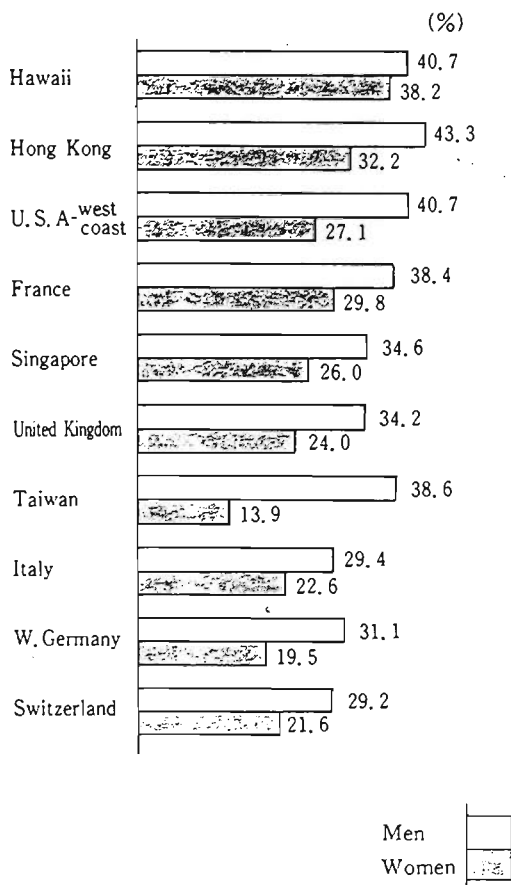
\* Estimated figure

Source: White Paper on Tourism -1992

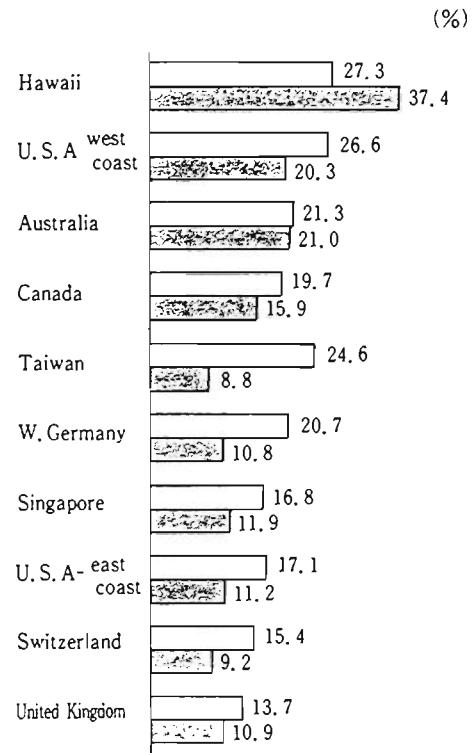
## APPENDIX B -2

### DESTINATION IMAGES

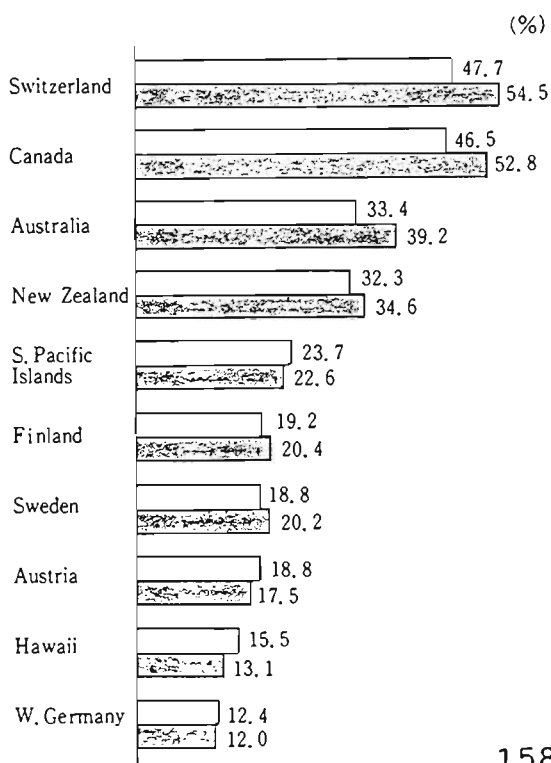
Countries Which Have Been Visited(Not Including Trip This Time)



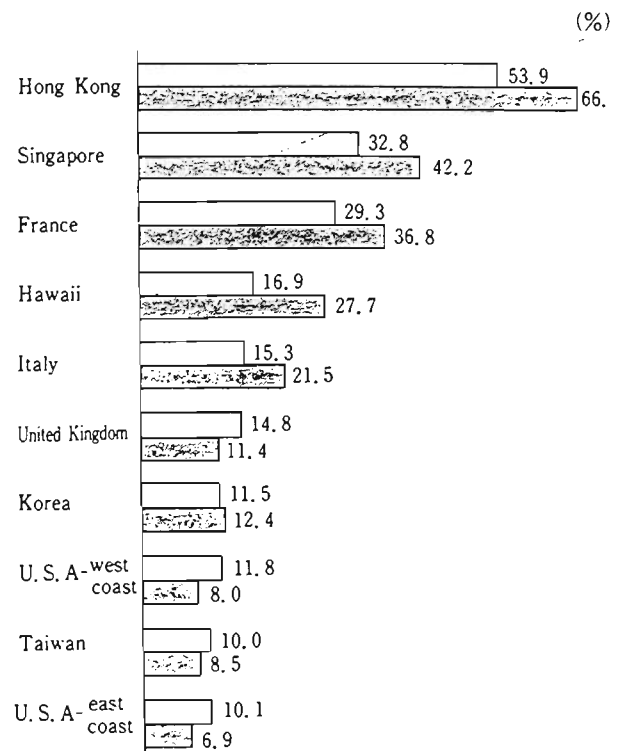
Countries or Places with Impression of Friendliness



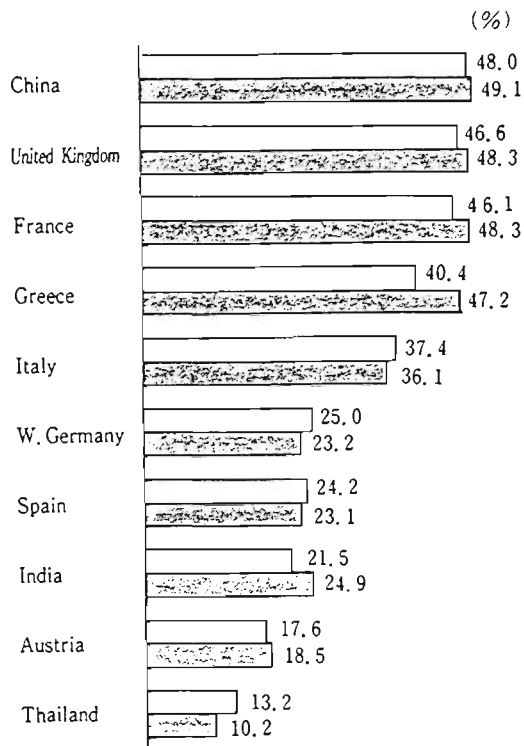
Countries or Places with Scenic Beauty



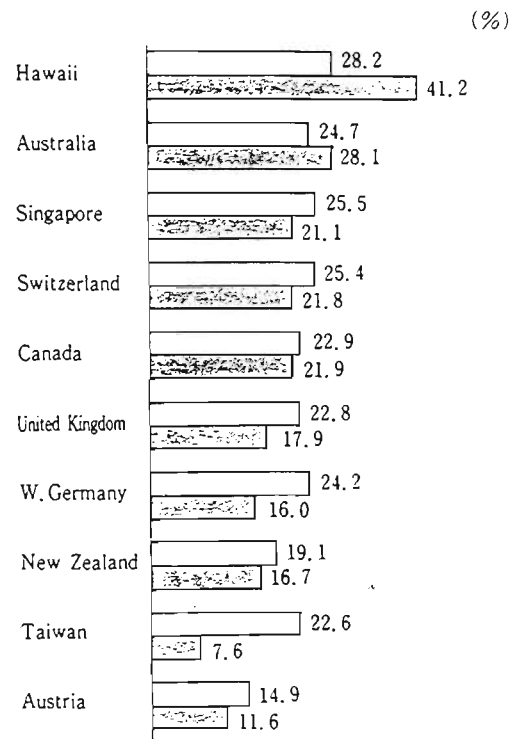
Countries or Places for Shopping



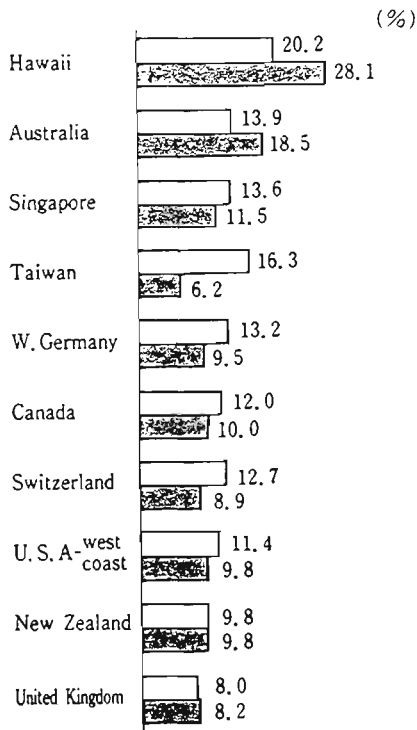
Countries or Places with  
Cultural or Historical Impressions



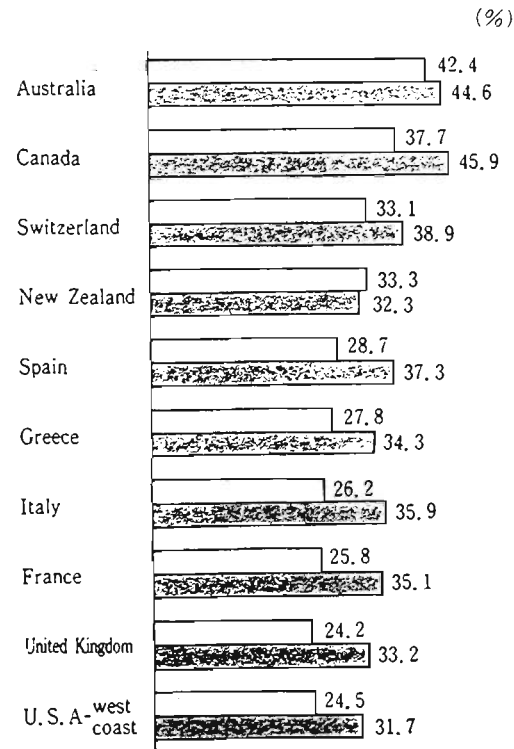
Countries or Places Where  
One Can Travel Safely



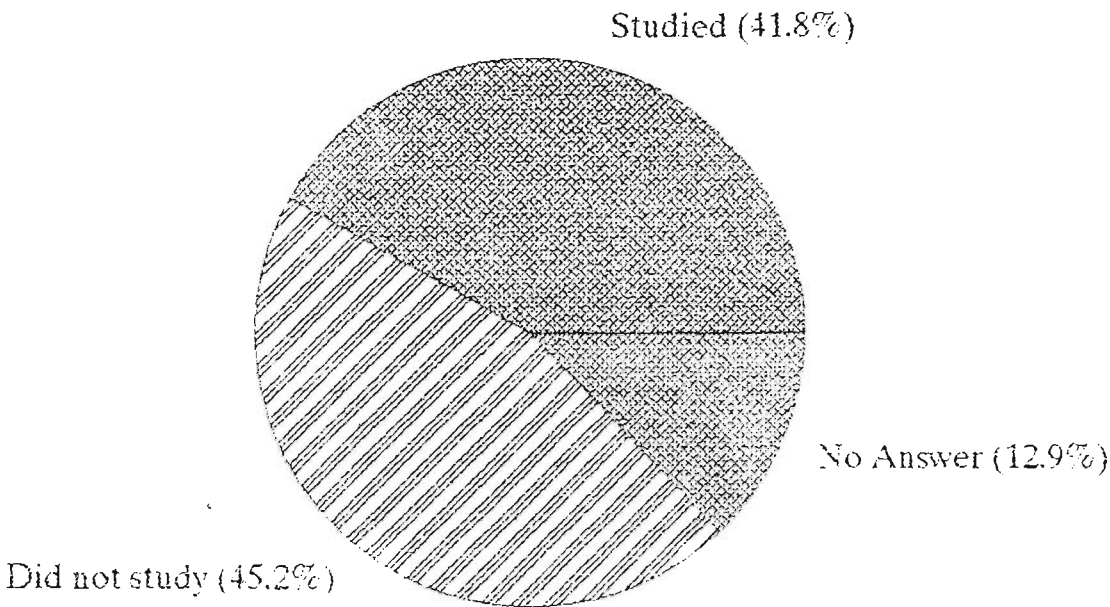
Countries or Places Where  
People Are Kind to Travelers



Countries or Places Which  
One Would Like to Visit

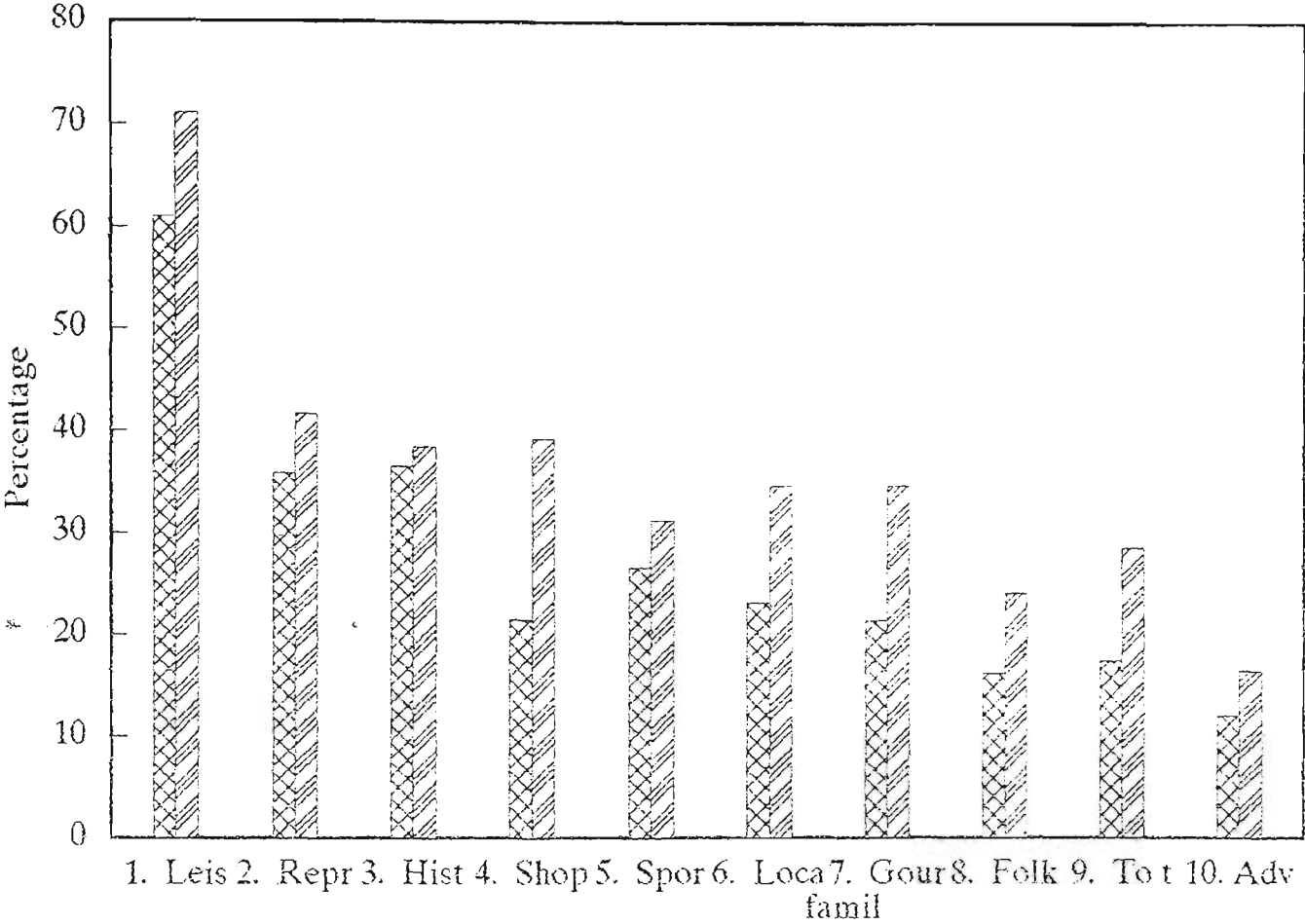


# Alternative Destination Study



DESTINATION VISITED	ALTERNATIVE DESTINATION STUDIED	
	NO.1	NO. 2
HAWAII	Australia (9.1%)	Guam (6.5%)
FRANCE	Spain (10.1%)	W.Germany (9.1%)
AUSTRALIA	Hawaii (12.6%)	Canada (8.5%)
HONG KONG	Hawaii (9.4%)	Singapore (8.2%)
ITALY	Spain (11.0%)	W.Germany (9.5%)
UNITED KINGDOM	Spain (10.5%)	W.Germany (7.1%)
GUAM	Hawaii (16.6%)	Saipan (15.9%)
SINGAPORE	Hawaii (10.4%)	Hong Kong (6.5%)
WEST GERMANY	Italy (12.7%)	Spain (10.0%)

# Overseas Travel One Would Like to Make



TYPES OF TRAVEL	No.1	No.2	No.3	No.4	No5
1. Leisurely stay (relaxing) tours	Hawaii	Australia	France	S.Pacific Isl.	Canada
2. Representative sightseeing tours	France	Switzerland	Italy	W.Germany	U.K.
3. Historical and ancient ruins tours	Greece	China	Italy	Spain	France
4. Shopping tours	Hong Kong	Singapore	France	Italy	Hawaii
5. Sports tours	Hawaii	Australia	Canada	Guam	S.Pacific Isl
6. Local life and customs familiarization tours	U.K.	Australia	Spain	W.Germany	China
7. Gourmet tours	Hong Kong	Taiwan	France	italy	Korea
8. Folklore tours	France	Austria	Italy	Spain	W.Germany
9. To the see and mountain tours	Hawaii	Switzerland	Australia	S.Pacific Isl.	Canada
10. Adventure and remote place tours	Latin America	N.Africa	E.Africa	China	S.Africa



# APPENDIX C

## Results of Survey (supplementally Data)

1. Preferred Mode of Travel
2. The Purposes of the Trips
3. Images of Australia

The Length of the Trip

			T o t a l	L e d s a y s  t h a	3 / 5 d a y s	A b o u t  w e e k	A b o u t  d a y s	A b o u t  w e e k s	A b o u t  w e e k s	A b o u t  m o n t h	O v e r  m o n t h	D . K .
TOTAL			100.0 404	0.2 1	1.0 4	17.1 69	19.1 77	28.7 116	8.4 34	15.5 62	9.9 40	2.5 10
S E X	MALE		100.0 262	0.4 1	1.1 3	16.0 42	17.2 43	29.8 78	8.8 23	14.5 38	12.2 32	3.1 8
	FEMALE		100.0 142	-	0.7 1	19.0 27	22.5 32	26.8 38	7.7 11	16.0 24	5.6 8	1.4 2
U N I  Y R S	1ST YEAR		100.0 141	-	0.7 1	18.4 26	18.4 26	29.8 42	8.5 12	18.4 26	7.8 11	2.8 4
	2ND YEAR		100.0 83	-	2.4 2	14.5 12	22.9 19	30.1 25	7.9 6	12.0 10	9.4 8	1.2 1
	3RD YEAR		100.0 89	1.1 1	-	13.5 12	16.9 15	30.5 27	7.9 7	15.7 14	13.5 12	3.4 5
	4TH YEAR		100.0 91	-	1.1 1	20.9 19	18.7 17	24.2 22	9.0 9	15.2 12	9.8 9	2.9 2
L A N G U	FLUENT		100.0 15	-	-	15.4 2	30.8 4	7.7 1	-	15.4 2	23.1 3	7.7 1
	QUITE		100.0 32	-	-	9.4 3	28.1 9	28.1 9	9.4 3	12.5 4	12.5 4	-
	LITTLE/NOT		100.0 358	0.5 1	1.1 4	17.8 64	17.8 64	29.5 106	8.6 31	15.7 57	9.9 39	2.5 9
T R A V E L  E X	Y E S	TOTAL	100.0 155	-	0.8 1	13.5 18	18.8 25	28.0 38	8.9 11	17.9 25	12.0 16	1.5 2
		YES/ UNI	100.0 98	-	1.0 1	14.5 14	17.3 17	27.6 27	11.9 11	17.3 17	10.9 11	1.0 1
		NO/ UNI	100.0 55	-	-	11.4 4	22.9 8	31.4 11	-	17.1 6	17.1 6	2.9 1
	STAY O/SEAS		100.0 11	-	-	-	18.2 2	30.4 4	-	30.4 4	9.1 1	9.1 1
	NO NEVER		100.0 271	0.4 1	1.1 3	18.8 31	19.2 32	28.8 78	8.5 23	14.4 39	8.9 24	3.6 8

## Preferred Season for Travel

		T o t a l	S h o l i d a y	G o l d e n	J u n e / J u l y	S h o l i d a y	S e p t / N o v	W h o l i d a y	J a n / F e b	O t h e r s	N . A
TOTAL		100.0 404	51.2 126	2.2 9	2.7 11	18.3 74	8.9 36	39.4 159	10.4 42	2.5 10	1.5 6
S E X	MALE	100.0 262	27.9 73	1.5 4	1.9 8	18.7 49	8.8 23	40.5 106	10.3 27	3.4 9	1.5 4
	FEMALE	100.0 142	37.3 55	3.5 5	4.2 6	17.6 25	9.2 13	37.3 53	10.6 15	0.7 1	1.4 2
U N I Y R S	1ST YEAR	100.0 141	32.6 46	0.7 1	2.1 3	21.3 30	12.8 18	36.2 51	14.2 20	1.4 2	-
	2ND YEAR	100.0 83	26.5 22	-	6.0 5	16.9 14	8.4 7	39.8 33	6.0 5	-	3.6 3
	3RD YEAR	100.0 89	31.5 26	2.2 3	1.1 1	16.9 15	10.1 9	41.6 37	12.4 11	4.5 4	1.1 1
	4TH YEAR	100.0 91	33.0 30	6.6 6	2.2 2	16.5 15	2.2 2	41.8 38	6.6 6	4.4 4	2.2 2
L A N G U	FLUENT	100.0 13	30.8 4	-	-	30.8 4	7.7 1	23.1 3	-	15.4 2	-
	QUITE	100.0 32	43.8 14	-	3.1 1	12.5 4	9.4 3	28.1 9	15.6 5	6.3 2	-
	LITTLE/NOT	100.0 359	30.1 108	2.5 9	2.8 11	18.4 60	8.8 32	40.9 147	10.3 37	1.7 6	1.7 6
T R A V E L  E X	Y E S	TOTAL	100.0 133	51.6 42	1.5 2	3.0 4	19.5 26	6.8 9	40.6 54	6.8 9	3.0 4
		YES/ UNI	100.0 98	54.7 34	2.0 2	3.1 3	18.4 12	6.1 6	36.7 30	7.1 7	3.1 3
		NO/ UNI	100.0 35	22.9 8	-	2.9 1	22.9 8	8.6 3	51.4 18	5.7 2	2.9 1
	STAY O/SEAS		100.0 11	36.4 4	-	-	45.5 5	9.1 1	18.2 2	9.1 1	9.1 1
	NO NEVER		100.0 271	31.0 84	2.6 7	2.6 7	17.7 48	10.0 27	38.7 105	12.2 33	2.0 6

# The Sources of Information

			T o t a l	T a l k e n t o	T a l l i n g t o s	T a l l K a s t o y	I n f o r m a t i o n	T r a g a v a l i n	P a g e r s i n	U n i C O O P	T v R a d i o	F r i e n d s T a l k t o	O t h e r s	D o n ' t p l a n	D · K
TOTAL			100.0 404	49.3 199	8.2 33	5.7 23	40.8 165	49.3 199	13.4 54	6.7 27	4.7 19	40.8 165	1.7 7	4.7 19	2.2 9
S E X	MALE		100.0 262	48.1 126	8.0 21	6.3 17	34.0 89	44.3 116	14.3 35	6.1 16	3.8 10	37.4 95	1.9 5	6.9 18	3.1 8
	FEMALE		100.0 142	51.4 73	8.3 12	4.2 6	58.5 70	58.3 83	11.3 16	7.7 11	6.3 9	47.2 67	1.4 2	0.7 1	0.7 1
U N I Y R S	1ST YEAR		100.0 141	50.4 71	9.9 14	3.3 5	48.2 68	44.0 62	14.2 20	6.4 9	6.4 9	39.7 56	2.1 3	4.3 6	2.8 4
	2ND YEAR		100.0 83	50.6 42	6.0 5	6.0 5	34.8 29	55.4 45	6.0 5	6.0 5	2.4 2	36.1 30	1.2 1	4.8 4	1.2 1
	3RD YEAR		100.0 88	43.8 39	4.3 4	9.0 8	40.4 36	58.4 52	18.0 16	7.9 7	4.3 4	48.4 44	1.1 1	3.4 3	2.2 2
	4TH YEAR		100.0 91	51.6 47	11.0 10	5.3 5	35.2 32	42.9 39	14.3 13	6.6 6	4.4 4	38.3 35	2.2 2	6.6 6	2.2 2
L A N G U	FLUENT		100.0 13	38.5 5	7.7 1	15.4 2	15.4 2	23.1 3	-	-	-	23.1 3	23.1 3	-	7.7 1
	QUITE		100.0 32	40.6 13	6.3 2	12.3 4	40.0 13	50.0 16	18.8 6	12.3 4	6.3 2	40.6 13	3.1 1	6.3 2	-
	LITTLE/NOT		100.0 359	50.4 181	8.4 30	4.7 17	41.8 150	50.1 180	13.4 48	6.4 23	4.7 17	41.3 148	0.8 3	4.7 17	2.2 8
T R A V E L E X	Y E S	TOTAL	100.0 133	36.8 49	6.0 8	7.3 10	38.1 50	51.9 69	10.3 14	3.3 7	3.0 4	38.3 51	2.3 3	4.3 6	1.3 2
		YES/ UNI	100.0 51	37.8 37	5.1 5	9.2 9	38.8 38	54.1 53	9.2 9	3.1 3	2.0 2	33.7 33	2.0 2	4.1 4	2.0 2
		NO/ UNI	100.0 82	34.3 12	8.1 3	2.9 1	49.0 14	43.7 10	14.3 6	11.4 4	5.7 2	45.7 16	2.9 1	5.7 2	-
	STAY O/SEAS		100.0 11	27.3 3	-	9.1 1	18.2 3	27.3 3	18.2 3	9.1 1	-	27.3 3	9.1 1	9.1 1	9.1 1
	NO NEVER		100.0 27	55.4 15	9.2 25	4.8 13	41.7 113	48.0 130	14.8 40	7.4 20	3.3 9	42.1 114	1.5 4	4.8 13	2.6 7

# Expenditure

( '000 )

			T o t a l	1 e s s e n	1 0 0 9 t o e n	2 0 2 0 9 t y e n	3 0 3 0 9 t y e n	4 0 4 0 9 t y e n	5 0 5 0 9 t y e n	6 0 7 0 9 t y e n	8 0 9 0 9 t y e n	M o r e 0 0 y e n	D . K
TOTAL			100.0 404	1.0 4	10.4 42	27.0 109	15.1 61	20.5 83	11.1 45	2.5 10	2.5 10	3.7 15	6.2 25
S E X	MALE		100.0 262	1.1 3	13.0 34	27.5 72	14.5 38	17.6 46	10.7 28	2.5 6	2.7 7	5.0 13	5.7 15
	FEMALE		100.0 142	0.7 1	5.6 8	26.1 37	16.2 23	26.1 37	12.0 17	2.8 4	2.1 3	1.4 2	7.0 10
U N I  Y R S	1ST YEAR		100.0 141	0.7 1	6.4 9	21.5 30	13.5 19	23.4 33	14.2 20	2.8 4	3.5 5	3.5 5	10.6 15
	2ND YEAR		100.0 83	-	10.8 9	30.1 25	16.9 14	21.7 18	9.6 8	2.4 2	-	4.8 4	5.0 3
	3RD YEAR		100.0 69	1.1 1	13.5 12	30.5 27	15.7 14	20.2 18	9.0 8	1.1 1	3.4 3	1.1 1	4.5 4
	4TH YEAR		100.0 91	2.2 2	13.2 12	29.7 27	15.4 14	15.4 14	9.9 8	3.5 3	2.2 2	5.5 3	5.5 3
L A N G U	FLUENT		100.0 15	15.4 2	23.1 3	7.7 1	7.7 1	23.1 3	23.1 3	-	-	-	-
	QUITE		100.0 32	3.1 1	6.5 2	28.1 5	21.9 7	21.9 7	6.5 2	6.5 2	-	6.5 2	-
	LITTLE/NOT		100.0 358	0.5 1	10.5 37	27.6 99	14.8 33	26.5 73	11.1 40	2.2 8	2.8 10	3.6 13	7.0 25
T R A V E L  E X	Y E S	TOTAL	100.0 153	1.5 2	10.5 14	31.6 42	12.0 16	21.1 28	11.3 15	4.5 6	1.5 2	3.0 4	5.0 4
		YES/ UNI	100.0 98	1.0 1	12.2 12	29.6 29	9.2 5	24.5 24	13.3 13	4.1 4	-	4.1 4	2.0 2
		NO/ UNI	100.0 35	2.9 1	5.7 2	37.1 13	20.6 7	11.4 4	5.7 2	5.7 2	5.7 2	-	5.7 2
	STAY O/SEAS		100.0 11	-	18.2 2	9.1 1	9.1 1	36.4 4	18.2 2	-	-	-	9.1 1
	NO NEVER		100.0 271	0.7 2	10.3 28	24.7 67	16.6 45	20.5 55	11.1 30	1.5 4	3.0 8	4.1 11	7.7 21

Multiple Destinations

		Total	Thailand	Singapore	China	Other South East Asia	South Pacific	New Zealand
Sex	Male	100.0 (164)	0.6	0.6	0	2.4	9.8	81.3
	Female	100.0 (85)	0	0	1.2	2.4	4.7	83.5
Total		100.0 (249)	0.4	0.4	0.4	2.4	8.0	82.3

		Total	U.S.A	Canada	Sth/Ctr America	Europe	Africa Middle East	Others
Sex	Male	100.0 (164)	0	1.2	1.8	1.2	1.8	3.7
	Female	100.0 (85)	1.2	1.2	1.2	0	0	8.2
Total		100.0 (249)	0.8	1.2	1.6	0.8	1.2	5.2

## Appendix C - 2

### The Purpose of Trips (%)

	China	Hawaii	Australia	New Zealand	U.S.A.	Canada	U.S.S.R.	Europe
Holiday	83.3	97.4	87.7	92.4	60.9	70.9	80.1	81.3
V.F.R.	0.6	0	1.9	0	6.6	2.5	0.7	0.7
Training/learning	7.7	0.9	4.2	2.5	4.7	3.8	11.8	2.8
Study	4.5	0	8.4	6.3	35.7	24.9	7.4	21.2
Others	5.0	1.8	3.1	2.5	5.1	6.3	2.9	3.1
N.A.	1.3	1.7	2.5	1.9	1.8	1.7	0	2.4
Total (number)	100.0 (156)	100.0 (116)	100.0 (235)	100.0 (158)	100.0 (258)	100.0 (237)	100.0 (136)	100.0 (288)

	Taiwan	South Korea	Hong Kong/ Macau	Philippines	Thailand	Singapore	Other South East Asia
Holiday	88.5	84.9	93.9	79.3	85.0	94.1	90.0
V.F.R.	6.6	2.7	1.0	3.4	0	2.0	2.0
Training/learning	0	6.8	1.0	6.9	5.0	2.0	4.3
Study	0	0	0	0	1.3	1.0	0
Others	1.6	5.5	3.1	13.7	7.6	2.0	2.9
N.A.	3.3	1.4	1.0	0	2.5	0	2.9
Total (number)	100.0 (61)	100.0 (73)	100.0 (98)	100.0 (29)	100.0 (80)	100.0 (102)	100.0 (70)

	Guam/ Saipan	South Pacific	South\Central America	Eastern Europe	Africa Middle East	Around the World	Others
Holiday	95.5	92.1	81.8	88.0	87.6	95.8	75.0
V.F.R.	1.1	0	3.9	0	0	0	0
Training/learning	0	0	6.5	10.7	6.2	0	6.3
Study	0	1.4	3.9	1.3	0.9	0.8	6.3
Others	2.2	5.0	6.5	2.7	6.2	0.8	6.3
N.A.	2.2	5.0	0	1.3	1.8	1.7	12.5
Total (number)	100.0 (89)	100.0 (139)	100.0 (77)	100.0 (75)	100.0 (113)	100.0 (118)	100.0 (16)

**APPENDIX C - 3**  
**IMAGES OF AUSTRALIA (%)**

		Attractive					Unattractive			
		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	26.1	37.8	19.7	11.9	3.1	0.9	0.4	1.67
S c x	Male	100.0 (298)	24.2	37.6	20.8	13.4	3.0	0.7	0.3	1.63
	Female	100.0 (154)	29.9	38.3	17.5	9.1	3.2	1.3	0.6	1.76
	Fluent/Quite well	100.0 (53)	28.3	28.3	20.8	11.3	9.4	0	1.9	1.47
	Little/Not at all	100.0 (399)	25.8	39.1	19.5	12.0	2.3	1.0	0.3	1.70

		Full of Nature					Lack of Nature			
		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	57.3	31.2	6.0	5.5	0.7	0.2	0	2.37
S e x	Male	100.0 (298)	53.7	31.2	7.7	6.0	1.0	0.3	0	2.30
	Female	100.0 (154)	64.3	28.6	2.6	4.5	0	0	0	2.53
	Fluent/Quite well	100.0 (53)	73.6	34.0	5.7	3.8	1.9	0	0	2.36
	Little/Not at all	100.0 (399)	57.6	29.8	6.0	5.8	0.5	0.3	0	2.38

		Relaxing					Busy			
		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	31.6	34.3	18.1	13.7	1.3	0.9	0	1.79
Sex	Male	100.0 (298)	28.2	33.2	20.5	14.8	2.0	1.3	0	1.67
	Female	100.0 (154)	38.3	36.4	13.6	11.7	0	0	0	2.01
	Fluent/Quite well	100.0 (53)26.4	37.7	15.1	17.0	1.9	1.9	1.9	0	1.64
	Little/Not at all	100.0 (399)	32.3	33.8	18.5	13.3	1.3	0.8	0	1.80



IMAGES OF AUSTRALIA (%)

Cheap to Travel                      Expensive to Travel

		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	2.2	3.5	16.4	50.2	13.5	10.8	3.3	-0.15
Sex	Male	100.0 (298)	1.7	4.0	16.8	47.3	14.1	12.8	3.4	-0.20
	Female	100.0 (154)	3.2	2.6	15.6	55.8	12.3	7.1	3.2	-0.06
	Fluent/Quite well	100.0 (53)	5.7	3.8	20.8	43.4	13.2	9.4	3.8	0.02
	Little/Not at all	100.0 (399)	1.8	3.5	15.8	51.1	13.5	11.0	3.3	-0.17

Young                                      Old

		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	12.6	32.3	29.6	21.2	3.1	0.7	0.4	1.26
Sex	Male	100.0 (298)	13.8	32.2	27.2	21.5	4.0	1.0	0.3	1.26
	Female	100.0 (154)	10.4	32.5	34.4	20.8	1.3	0	0.6	1.27
	Fluent/Quite well	100.0 (53)	17.0	43.4	13.2	18.9	5.7	0	1.9	1.40
	Little/Not at all	100.0 (399)	12.0	30.8	31.8	21.6	2.8	0.8	0.3	1.25

Familiar                                      Unfamiliar

		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	2.7	8.4	35.2	34.1	11.7	6.4	1.5	0.31
Sex	Male	100.0 (298)	2.0	7.0	37.9	32.6	12.1	6.7	1.7	0.28
	Female	100.0 (154)	3.9	11.0	29.9	37.0	11.0	5.8	1.3	0.37
	Fluent/Quite well	100.0 (53)	11.3	13.2	35.8	26.4	5.7	7.5	0	0.76
	Little/Not at all	100.0 (399)	1.5	7.8	35.1	35.1	12.5	6.3	1.8	0.25

Far    Close

		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	18.6	16.8	25.9	21.2	12.4	3.8	1.3	0.91
Sex	Male	100.0 (298)	18.8	17.1	26.2	19.8	12.1	5.0	1.0	0.92
	Female	100.0 (154)	18.2	16.2	25.3	24.0	13.0	1.3	1.9	0.91
	Fluent/Quite well	100.0 (53)	20.8	20.8	34.0	13.2	7.5	3.8	0	1.22
	Little/Not at all	100.0 (399)	18.3	16.3	24.8	22.3	13.0	3.8	1.5	0.87

IMAGES OF AUSTRALIA

Suitable for Shopping

Unsuitable for Shopping

		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	1.8	4.9	15.9	51.5	18.4	5.3	2.2	-0.05
Sex	Male	100.0 (298)	2.0	5.0	18.1	48.0	17.1	7.4	2.3	-0.05
	Female	100.0 (154)	1.3	4.5	11.7	58.4	20.8	1.3	1.9	-0.05
	Fluent/Quite well	100.0 (53)	3.8	7.5	11.3	43.4	26.4	3.8	3.8	-0.08
	Little/Not at all	100.0 (399)	1.5	4.5	16.5	52.6	17.3	5.5	2.0	-0.04

Refreshing

Gloomy

		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	19.0	33.0	27.4	17.3	2.2	1.1	0	1.46
Sex	Male	100.0 (298)	16.4	30.2	29.9	18.8	3.4	1.3	0	1.34
	Female	100.0 (154)	24.0	38.3	22.7	14.3	0	0.6	0	1.70
	Fluent/Quite well	100.0 (53)	22.6	30.2	26.4	17.0	1.9	1.9	0	1.49
	Little/Not at all	100.0 (399)	18.5	33.3	27.6	17.3	2.3	1.0	0	1.46

Historical

Lack of History

		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	1.5	2.7	10.6	35.2	22.3	16.4	11.3	-0.68
Sex	Male	100.0 (298)	2.0	3.0	9.1	31.9	22.5	18.8	12.8	-0.77
	Female	100.0 (154)	0.6	1.9	13.6	41.6	22.1	11.7	8.4	-0.51
	Fluent/Quite well	100.0 (53)	1.9	9.4	13.2	24.5	20.8	22.6	7.5	-0.51
	Little/Not at all	100.0 (399)	1.5	1.8	10.3	36.6	22.6	15.5	11.8	-0.71

Safe

Dangerous

		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	4.2	16.2	33.0	36.1	8.2	1.3	1.1	0.64
Sex	Male	100.0 (298)	3.4	14.1	35.2	35.9	8.1	1.7	1.7	0.57
	Female	100.0 (154)	5.8	20.1	28.6	36.4	8.4	0.6	0	0.77
	Fluent/Quite well	100.0 (53)	7.5	24.5	26.4	32.1	7.5	0	0	0.94
	Little/Not at all	100.0 (399)	3.8	14.8	33.8	36.6	8.3	1.5	1.3	0.60

# IMAGES OF AUSTRALIA (%)

## Urban

## Countryside

		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	2.4	6.0	25.0	36.3	20.1	8.0	2.2	0.02
Sex	Male	100.0 (298)	2.7	7.4	27.5	32.2	19.8	8.7	1.7	0.08
	Female	100.0 (154)	1.9	3.2	20.1	44.2	20.8	6.5	3.2	-0.11
	Fluent/Quite well	100.0 (53)	7.5	11.3	39.6	17.0	13.2	5.7	5.7	0.43
	Little/Not at all	100.0 (399)	1.8	5.3	23.1	38.8	21.1	8.3	1.8	-0.04

## Attractive Beaches

## Unattractive Beaches

		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	31.4	29.6	18.8	15.5	2.7	1.1	0.9	1.65
Sex	Male	100.0 (298)	29.9	29.9	19.1	15.8	2.3	1.7	1.3	1.59
	Female	100.0 (154)	34.4	29.2	18.2	14.9	3.2	0	0	1.77
	Fluent/Quite well	100.0 (53)	35.8	37.7	17.0	7.5	1.9	0	0	1.98
	Little/Not at all	100.0 (399)	30.8	28.6	19.0	16.5	2.8	1.3	1.0	1.60

## Learning

## Leisure

		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	2.4	7.5	15.9	38.5	10.8	15.0	9.7	-0.32
Sex	Male	100.0 (298)	2.3	6.0	14.4	40.3	10.1	16.1	10.7	-0.41
	Female	100.0 (154)	2.6	10.4	18.8	35.1	12.3	13.0	7.8	-0.14
	Fluent/Quite well	100.0 (53)	3.8	13.2	18.9	37.7	7.5	11.3	7.5	0.04
	Little/Not at all	100.0 (399)	2.3	6.8	15.5	38.6	11.3	15.5	10.0	-0.37

## Easy to Travel

## Difficult to Travel

		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	7.5	21.0	30.1	32.1	5.3	3.5	0.4	0.81
Sex	Male	100.0 (298)	6.7	17.1	30.9	33.6	6.7	4.7	0.3	0.68
	Female	100.0 (154)	9.1	28.6	28.6	29.2	2.6	1.3	0.6	1.06
	Fluent/Quite well	100.0 (53)	11.3	24.5	32.1	18.9	5.7	5.7	1.9	0.92
	Little/Not at all	100.0 (399)	7.0	20.6	29.8	33.8	5.3	3.3	0.3	0.79

IMAGES OF AUSTRALIA (%)

Little Time Difference      Great Time Difference

		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	11.9	19.2	17.9	38.7	6.0	4.0	2.2	0.72
Sex	Male	100.0 (298)	13.1	20.1	17.8	37.2	6.4	3.4	2.0	0.78
	Female	100.0 (154)	9.7	17.5	18.2	41.6	5.2	5.2	2.6	0.59
	Fluent/Quite well	100.0 (53)	13.2	28.3	24.5	28.3	3.8	0	1.9	1.11
	Little/Not at all	100.0 (399)	11.8	18.0	17.0	40.1	6.3	4.5	2.3	0.66

Friendly      Unfriendly

		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	11.7	28.5	31.2	23.2	4.0	1.1	0.2	1.17
Sex	Male	100.0 (298)	9.4	29.5	30.9	23.8	4.7	1.3	0.3	1.10
	Female	100.0 (154)	16.2	26.6	31.8	22.1	2.6	0.6	0	1.30
	Fluent/Quite well	100.0 (53)	13.2	30.2	26.4	20.8	5.7	3.8	0	1.13
	Little/Not at all	100.0 (399)	11.5	28.3	31.8	23.6	3.8	0.8	0.3	1.17

Suitable for      Unsuitable for  
Marine Sports      Marine Sports

		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	31.0	26.8	19.5	18.4	3.1	0.4	0.9	1.59
Sex	Male	100.0 (298)	29.2	28.9	19.1	18.1	3.4	0.3	1.0	1.57
	Female	100.0 (154)	34.4	22.7	20.1	18.8	2.6	0.6	0.6	1.63
	Fluent/Quite well	100.0 (53)	24.5	37.7	22.6	11.3	3.8	0	0	1.68
	Little/Not at all	100.0 (399)	31.8	25.3	19.0	19.3	3.0	0.5	1.0	1.58

## IMAGES OF AUSTRALIA (%)

### Helpful

### Indifferent

		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	5.3	17.9	28.1	44.5	3.3	0.7	0.2	0.75
Sex	Male	100.0 (298)	4.0	14.4	27.9	48.7	3.7	1.0	0.3	0.62
	Female	100.0 (154)	7.8	24.7	28.6	36.4	2.6	0	0	0.99
	Fluent/Quite well	100.0 (53)	9.4	30.2	17.0	39.6	3.8	0	0	1.02
	Little/Not at all	100.0 (399)	4.8	16.3	29.6	4.51	3.3	0.8	0.3	0.71

### Warm/mild

### Cold

		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	17.0	31.6	25.2	21.9	2.9	1.1	0.2	1.34
Sex	Male	100.0 (298)	16.4	30.2	24.2	23.2	4.0	1.7	0.3	1.26
	Female	100.0 (154)	18.2	34.4	27.3	19.5	0.6	0	0	1.50
	Fluent/Quite well	100.0 (53)	20.8	28.3	24.5	17.0	7.5	1.9	0	1.32
	Little/Not at all	100.0 (399)	16.5	32.1	25.3	22.6	2.3	1.0	0.3	1.34

### Masculine

### Feminine

		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	3.8	10.6	18.4	56.9	6.9	3.1	0.4	0.37
Sex	Male	100.0 (298)	5.0	12.8	19.1	52.7	6.7	3.0	0.7	0.45
	Female	100.0 (154)	1.3	6.5	16.9	64.9	7.1	3.2	0	0.20
	Fluent/Quite well	100.0 (53)	1.9	24.5	18.9	39.6	11.3	3.8	0	0.55
	Little/Not at all	100.0 (399)	4.0	8.8	18.3	59.1	6.3	3.0	0.5	0.34

### Cultural Traditional

### Lack of Culture/Tradition

		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	2.9	4.4	10.2	47.7	20.4	10.6	4.9	-0.29
Sex	Male	100.0 (298)	3.4	5.4	8.7	45.0	20.5	11.7	5.4	-0.31
	Female	100.0 (154)	1.9	2.6	13.0	50.0	20.1	8.4	3.9	-0.25
	Fluent/Quite well	100.0 (53)	7.5	9.4	9.4	35.8	18.9	13.2	5.7	-0.11
	Little/Not at all	100.0 (399)	2.3	3.8	10.3	48.1	20.6	10.3	4.8	-0.31

IMAGES OF AUSTRALIA (%)

Suitable for Young                      Suitable for Middle Aged

		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	20.1	35.0	20.6	22.1	1.8	0.2	0.2	1.48
Sex	Male	100.0 (298)	17.4	37.02	20.1	22.5	2.3	0.3	0	1.44
	Female	100.0 (154)	25.3	30.5	21.4	21.4	0.6	0	0.6	1.56
		Fluent/Quite well	100.0 (53)	24.5	39.6	13.2	18.9	1.9	0	1.58
		Little/Not at all	100.0 (399)	19.5	34.3	21.6	22.6	1.8	0.3	1.47

Bright/Sunny                      Dark/Cloudy

		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	20.6	39.2	24.8	13.1	1.8	0.7	0	1.62
Sex	Male	100.0 (298)	16.4	38.9	27.2	13.8	2.7	1.0	0	1.50
	Female	100.0 (154)	28.6	39.6	20.1	11.7	0	0	0	1.85
		Fluent/Quite well	100.0 (53)	24.5	35.8	18.9	13.2	5.7	1.9	1.55
		Little/Not at all	100.0 (399)	20.1	39.6	25.6	13.0	1.3	0.5	1.63

Casual                      Formal

		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	6.2	13.3	28.3	37.4	9.7	4.4	0.7	0.53
Sex	Male	100.0 (298)	4.7	13.1	27.5	37.6	11.1	5.0	1.0	0.44
	Female	100.0 (154)	9.1	13.6	29.9	37.0	7.1	3.2	0	0.71
		Fluent/Quite well	100.0 (53)	11.3	18.9	22.6	32.1	9.4	5.7	0.73
		Little/Not at all	100.0 (399)	5.5	12.5	29.1	38.1	9.8	4.3	0.50

**IMAGES OF AUSTRALIA**

**Sophisticated  
Fashionable**

**Unsophisticated  
Unfashionable**

		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	1.5	6.0	12.8	45.6	22.6	8.8	2.7	-0.19
Sex	Male	100.0 (298)	1.7	6.0	13.1	43.3	22.5	10.1	3.4	-0.22
	Female	100.0 (154)	1.3	5.8	12.3	50.0	22.7	6.5	1.3	-0.12
	Fluent/Quite well	100.0 (53)	5.7	17.0	7.5	28.3	24.5	9.4	7.5	-0.08
	Little/Not at all	100.0 (399)	1.0	4.5	13.5	47.9	22.3	8.8	2.0	-0.20

**Suitable for  
Family Holiday**

**Suitable for  
Holiday with Friends**

		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	6.6	14.8	18.8	35.6	9.3	8.2	6.6	0.23
Sex	Male	100.0 (298)	5.0	13.4	19.1	25.9	9.7	9.7	7.0	0.11
	Female	100.0 (154)	9.7	17.5	18.2	35.1	8.4	5.2	5.8	0.46
	Fluent/Quite well	100.0 (53)	9.4	17.0	11.3	34.0	9.4	11.3	7.5	0.19
	Little/Not at all	100.0 (399)	6.3	14.5	19.8	35.8	9.3	7.8	6.5	0.23

**Suitable for  
Honeymooners**

**Suitable for  
Elderly**

		Total	Very +3	Quite +2	Fair +1	Neither 0	Fair -1	Quite -2	Very -3	Mean
Total		100.0 (452)	17.9	24.6	21.7	32.1	2.4	0.7	0.7	1.19
Sex	Male	100.0 (298)	17.1	25.8	21.1	31.2	3.0	0.7	1.0	1.17
	Female	100.0 (154)	19.5	22.1	22.7	33.8	1.3	0.6	0	1.23
	Fluent/Quite well	100.0 (53)	13.2	30.2	22.6	28.3	1.9	1.9	1.9	1.11
	Little/Not at all	100.0 (399)	18.5	23.8	21.6	32.6	2.5	0.5	0.5	1.20

# **BIBLIOGRAPHY**



\* The materials indicated are written in Japanese.

\* AB-road, Kaigai Toshi Ninki Chousa (Survey on the Popularity of Major Overseas Cities- Cities that tourists want to visit and have visited), Recruit Inc., Tokyo, 1988

Adler, J., Youth on the road - Reflections on the History of Tramping, Annals of Tourism Research 12: 335-354, 1985

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 Tourists or Guests?: The Issues Key Solutions- Future Prospects, proceedings of a conference held in Sydney, March 3, 1988

Australian Tourist Commission, Market Brief Japan, 1982

Australian Tourist Commission, Market Brief Japan, 1984

Australian Tourist Commission, Market Brief Japan, 1991

Australian Tourist Commission, Statistical Review, 1987-1990a

Australian Tourist Commission, Japanese Holiday Satisfaction Study, Executive Summary Report, Strategic Market Unit, Sydney, 1990b

Bailey, M., Japan Outbound - A study of the Japanese travelling overseas, Travel and Tourism Analyst, April 1986

Bauer, T. G., The perceptions, holiday expectations and holiday experiences of German speaking visitors to southern Australia, Victoria University of Technology, Melbourne, 1990

Bureau of Tourism Research, International Visitor Survey, 1985-1991

Bureau of Tourism Research, and David H Jacobs Consultants, Japanese Tourism In Australia - Market Segmentation: A Key to New Opportunities, Canberra, 1992

- Bureau of Tourism Research, International Visitor Survey - Major market Report, Japan, 1988-1990
- Calantone, R. J., and Mazanec, J. A., Marketing Management and Tourism, Annals of Tourism Research 18: 101-119, 1991
- Cohen, E., Marginal Paradises - Bungalow Tourism on the Islands of Southern Thailand, Annals of Tourism Research 9: 189-228, 1982
- Cohen, E., and Cooper, R. L., Language and Tourism, Annals of Tourism Research 13: 533-563, 1986
- Curnow, I., Japanese Travel To Australia: prospects and Issues, Australia-Japan Research Centre, Canberra, 1990
- Davis, B. D., Quantitative Applications in Tourism Market Segmentation: Traverse City, Michigan, Michigan State University, 1986
- The Economist, June 6th 1992
- Euromonitor Publications Ltd, Japan Marketing Handbook, Euromonitor Publications Ltd, London, 1985
- Gartner, W. C., Tourism Image: Attribute Measurement of State Tourism Products Using Multidimensional Scaling Techniques, Journal of Travel Research 27, 3: 16-20
- Goodall, B. and Ashworth, G. Marketing In The Tourism Industry, Croom Helm, London, 1988
- Graburn, N. H. H., To Pray, Pay and Play: The Cultural Structure of Japanese Tourism, Centre des Hautes Etudes Touristiques, Aix-en-Provence, 1983
- Hasegawa, K., The Recruits Revolt, Japan Echo 15, No 3: 61-62, 1988
- Holloway, J. C., and Plant, R. V., Marketing for Tourism, Pitman Publishing, London, 1988
- Japan National Tourist Organization, Tourism in Japan - 1991
- Kale, S. H., McIntyre, R. P., and Weir, K. M., Marketing Overseas Tour Packages to the Youth Segment: An Empirical Analysis, Journal of Travel Research 25, 4: 20-24, 1987
- Katayama, F., Japan's Prodigal Young Are Dippy About Imports, Fortune 115, 10, 118-120
- Kato, Y., Yokohama - Past and Present, Yokohama City University, Yokohama, 1990

- \* Keene, D., Nihonjin no Shitsumon (Questions from the Japanese), Asahi Shimbunsha, Tokyo, 1988
- Keown, C. F., A Model Of Tourists' Propensity To Buy: the Case of Japanese Visitors To Hawaii, Journal of Travel Research 27, 3: 31-34
- King, B. E. M., and Hyde G. Tourism Marketing in Australia Hospitality Press, Melbourne, 1989
- Kusaka, K., Dawn of a New Employment Era, Japan Echo, 15, No 3: 63-67, 1988
- Kucukkurt, M., Factors Affecting Travel Destination Choice: An Expectancy Theory Framework for Studying Travel Behaviour, Rensselaer Polytechnic Institute, New York, 1981
- Laarman, J. G., and Perdue, R. R., Science Tourism in Costa Rica, Annals of Tourism Research 16: 205-215
- Langowoj, I., The perception of Australian hosts by Japanese tourists, Victoria University of Technology, Melbourne, 1990
- Lawson, R., Patterns Of Tourist Expenditure And Types Of Vacation Across The Family Life Cycle, Journal of Travel Research 29, 4: 12-18, 1991
- Leiper, N., The Japanese Travel Market and Its Potential For Australian Tourist Destinations, Qantas Airways Ltd, Sydney, 1985
- Leiper, N., Tourism System - An Interdisciplinary Perspective, Massey University, Palmerston North, 1990
- MacCannell, D., The Tourist - A New Theory of The Leisure Class, Schcken Books, New York, 1976
- \* Mainichi Simbun (Mainichi Daily News), 10 March, 1992
- Mainichi Shimbunsha (Mainichi Daily News Inc.) 23rd Survey on Japanese Overseas Air Travellers, 1990
- McIntosh, R. W., and Goeldner, C. R., Tourism, John Wiley and Sons, Inc.,
- Middleton, V. T. C., Marketing in Travel and Tourism, Heinemann Professional Publishing Ltd, Oxford, 1988
- \* Ministry of Justice (Japan), Annual Report of Statistics on Legal Migrants - Ed. 1985-1992, Tokyo, 1985-1992
- \* Ministry of Labour (Japan), White Paper on Labour: 1985-1992, Tokyo, 1985-1992

- Moeran, B., The Language of Japanese Tourism, Annals of Tourism Research 10: 93-108, 1983
- Morris S., Outbound Markets/Market Studies: Japanese Leisure Patterns, Travel and Tourism Analyst, No 5, 1988
- Morris S., Outbound Markets/Market Studies: Japanese Travel To Europe, Travel and Tourism Analyst, No 3, 1991
- \* Nippo Co., Danshidaigakusei no Sotsugyoryoko (Survey of Graduation Trips by the male students, Tokyo, 1991
- \* Nippon ChokiSaiken Ginko Inc. (Japan Long-term Bond Bank Inc., Nihonjin no Kaigairyokodoko to Kongono Tenbo (Trends of Japanese Overseas Travel), Nippon ChokiSaiken Ginko Inc., Tokyo, 1989
- New Zealand Tourist and Publicity Department, The Japanese Outbound Visitor Market, Research Section, New Zealand Tourist and Publicity Department, Wellington, 1989
- Pearce, P. L., the Ulysses Factor: Evaluating Visitors in Tourist Settings, Springer-Verlag, New York, 1988
- Pearce, P. L., The Backpacker Phenomenon, James Cook University of North Queensland, Townsville, 1990
- \* Prime Minister's Office (Japan), White Paper on Tourism, 1988-1992
- \* Prime Minister's Office (Japan), Survey on Overseas Travel, 1987
- \* Prime Minister's Office (Japan), Survey on Travel and Leisure Activities, 1986
- \* Prime Minister's Office (Japan), Survey on Leisure Time and Travel, 1988
- Queensland Tourist and Travel Corporation, Japan Market Brief, 1991
- Reilly, M. D., Free Elicitation of Descriptive Adjectives For Tourism image Assessment, Journal of Travel Research 28, 4: 21-26, 1990
- Riley, P. J., Road Culture of International long-term Budget Travellers, Annals of Tourism Research 15: 313-328, 1988
- \* Sakaiya, T., Nihonjin heno Keikoku (A Warning to Japanese), Shinchoshiya Co, Tokyo, 1988
- \* Shimaguchi, M., and Ishii, J. Gendai Marketing (Modern Marketing), Yuhikaku Co, Tokyo, 1987

- Siew Hoon, Y., Homing in on the Honeymooners, PATA Travel News, December 1990, 34-36
- Siew Hoon, Y., Japanese Travel in the '90s, PATA Travel News, May 1991: 17-18
- Smith, S. L., A test Of Plog's Allocentric/Psychocentric Model: Evidence From Seven Nations, Journal of travel Research 28, 4: 40-43, 1990
- Sugahara M., Consumers in Pursuit of the Good Life, Japan Echo 17, Special Issue: 57-60, 1990
- Tanabe S., Prodigal Children, Impoverished Parents, Japan Echo 17, Special Issue: 61-63, 1990
- Thibadoux, G. M., and Helms, M. M., An Analysis of a Successful International Study Abroad Program, Annals of Tourism Research 16: 564-566, 1989
- Van Been, W. M. O., and Verhallen, T. W. M., Vacation Market Segmentation - A Domain-Specific Value Approach, Annals of Tourism Research 13: 37-58, 1986
- Van Raaij, W. F., Consumer Research on Tourism: Mental and Behavioural Constructs, Annals of Tourism Research 13: 1-9, 1986
- Vandermerwe S., Youth Consumers: Growing Pains, Business Horizons, May-June 1990: 30-36
- Warner, R., Understanding the Japanese tourists, Caravan Park News, August, 1986: 5-7
- \* Yomiuri Shimbun (Yomiuri Daily News), 20 January, 1992
- Young Yen to be Yuppies, Marketing, June 2, 1988:18-19
- Ziff-Levine, W., The cultural logic gap - A Japanese tourism research experience, Tourism management, June 1990: 105- 110