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**ATTITUDES OF JAPANESE SKI TOUR OPERATORS TOWARD
WESTERN U.S. SKI RESORTS**

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ABSTRACT

The study was designed to provide important information about the Japanese ski market to U.S. ski resort marketers. One hundred-forty tour operating professionals responded to the survey. The perceived promotional activity level of Japanese tour operating companies toward U.S. ski destinations was found to be neither active nor inactive. The level of knowledge Japanese tour operating professionals have of U.S. ski resorts was found to be limited. There was a significant relationship between how they perceived their companies' promotion activity level toward U.S. ski tour packages and how well the same professionals knew these ski destinations. There was also a significant relationship between how knowledgeable Japanese tour operating professionals were about U.S. ski resorts and how favorably they would promote the same resorts. The implication was made that knowing the attitude of Japanese ski tour operators toward promoting U.S. ski tour packages and familiarizing them to U.S. ski resorts would

be the initial step for U.S. ski resorts to position themselves in this market place. The image Japanese tour operating professionals have of U.S. ski resorts and perceived promotional factors affecting their promotional activity level were also examined.

INTRODUCTION

Alpine skiing has become a remarkably popular sport among the Japanese people, reported as the fifth most popular activity among Japanese (13). It was estimated that 17.6 million people, accounting for 14% of Japan's population, participated in this sport in 1992 (13). Furthermore, overseas travel was ranked as the most popular leisure activity in the same study. Accordingly, an increasing percentage of Japanese skiers travel abroad in pursuit of this sport. Most travel is by means of group inclusive travel (GIT) (9, 14, 20, 23).

The market potential of Japanese skiers in foreign ski resorts would appear to be high.

However, the U.S. share of this market is disproportionately small when compared to other countries, especially Canada. In Canada, more than 50% of the international market consists of Japanese skiers (16). In the United States, only a few resorts have targeted Japan as a potential market in spite of the fact that there are 17 resorts in the West that have actively targeted overseas markets (B. E. Weichsel, President of SKIUSA, personal communication, March 9, 1994). A companion survey conducted at the same time as this study found that these 17 western U.S. ski resorts regarded the Japanese as a "potential market", yet reported their activities as "slightly inactive" in targeting this market (17). Reasons cited for not actively targeting the market were (a) cost inefficiency of marketing to the Japanese, (b) unfavorable leisure behavior patterns of the Japanese, (c) inconvenient resort location or poor accessibility to and from the airport, and (d) lack of sales and promotional competence of the U.S. ski resorts (17).

The preferred method of travel by Japanese tourists is GIT. It accounts for almost 80% of them to the United States for pleasure travel (9). Because of this, the market potential of Japanese skiers could be enhanced if more information about Japanese ski tour operators were available. Knowing perceptions of Japanese ski tour operating professionals toward promoting U.S. ski tour packages could help U.S. ski resorts position themselves more favorably in this market place. Perceptions of Japanese ski tour operators were assessed with promotional activity level, defined as the extent that Japanese tour operating companies promote U.S. ski resorts; promotional motivation, defined as the degree of Japanese tour operating professionals' motivation toward promoting U.S. ski tour packages; perceived image,

defined as the sum of beliefs, ideas, and impressions that Japanese tour operating professionals have of physical attributes of U.S. ski resorts (12); and perceived tourism promotional factors, defined as components required to organize a tour package, such as transportation and accommodation.

The purpose of this study was to investigate (a) perceptions of Japanese ski tour operating professionals about their companies' promotional activity level, (b) their knowledge about U.S. ski resorts and promotional motivation toward U.S. ski tour packages, and (c) their image of U.S. ski resorts and perceived tourism promotional factors affecting their promotional activity level.

METHODOLOGY

The study employed cluster sampling of 25 tour operating companies selling overseas ski packages and 10 employees who volunteered to participate within each company. Consequently, 250 Japanese tour operating professionals with 2 or more years of experience were contacted. The number of tour operating companies in Japan was estimated at somewhere between 20 and 30 (R. Kashimura, Japan Association of Travel Agents, personal communication, November 24, 1995). This sample, therefore, represented almost the entire potential population, contributing to the external validity of the study.

The study was conducted using a mailed survey procedure over a 2 month-winter period. After receiving consent from the manager at each company, the survey questionnaire was mailed to participants. Three follow-up mailings were conducted to increase the response rate. The 5 part self-administered questionnaire included: (a) a

profile of respondents and tour operating companies they work for, (b) their personal knowledge about 17 western U.S. ski resorts, (c) their motivation to promote these same resorts, (d) their general image of U.S. ski resorts, and (e) their perception of tourism factors that affect promoting U.S. ski tour packages. Descriptive statistics were used for data analysis. Pearson product moment correlation coefficients were used to test two hypotheses: (Ho1) there is no relationship between the perceived promotional activity level of Japanese tour operating companies toward U.S. ski resorts and their employees' knowledge level of these resorts and (Ho2) there is no relationship between the Japanese tour operating professionals' knowledge level of U.S. ski resorts and their promotional motivation level toward the ski resorts.

RESULTS

One hundred-forty respondents within 19 companies responded to the survey, representing a 76% company response and 56% individual response. About 60% of the respondents were male. The age of the respondents ranged from 20 to 60 with over 85% of the respondents in their 20's and 30's. Fifty-four percent of the respondents had 2 to 5 years of experience and 84% of them worked in Kanto area, which includes Tokyo. Thirty-nine percent of the respondents had skied overseas but only 16% of these respondents had skied in the United States.

Promotional activity level: The perceived promotional activity level of Japanese tour operating companies toward U.S. ski destinations was found to be somewhere between "indifferent" and "relatively active" ($\bar{x}=3.5$ on a 5 point Likert scale where "1" was "not active at all" and "5" was "very

active", $s=1.27$, $n=137$). Only 24.5% of the respondents indicated their company was somewhat active (4 or higher on a scale) in selling ski tour packages to the United States (See Table 1).

Promotional motivation: The familiarity-favorability measurement scale (12) was used to identify the respondents' knowledge of western U.S. ski resorts and their promotional motivation toward them. It was found that Japanese tour operating professionals had limited knowledge about western U.S. ski resorts. The grand mean score for all 17 U.S. ski resorts was 1.52 on a 5 point Likert scale where "1" was "never heard of" and "5" was "know very well" ($s=0.84$, $n=136$). Only one resort was rated higher than 2 ("heard of") as a mean. There was a significant relationship between how tour operating professionals perceived their companies' promotional activity level toward U.S. ski tour packages and how well the same professionals knew these ski destinations ($r=.64$, $p=.004$). As for the promotional motivation, when the respondent had knowledge of a resort, the resort was found to be "somewhat favorable" ($\bar{x}=3.5$ on a 5 point Like scale where "1" was unfavorable and "5" was very favorable) to promote ($s=1.06$, $n=53$). There was a significant relationship between how knowledgeable Japanese tour operating professionals were about U.S. ski resorts and how favorably they would promote the same resorts ($r=.90$, $p<.0001$) (See Table 2 and 3, and Figure 1).

Image: A semantic differential with five-point anchored scale was used to measure the respondents' perceptions of U.S. ski resorts. Larger numbers with the maximum of five indicated positive image while smaller numbers with the minimum of one indicated negative impression of an attribute. Their image of U.S. ski resorts as being spacious

and scenic was strongly positive. Snow conditions were also perceived as powdery and runs as diverse. On the other hand, the ski destinations were perceived as difficult to access and tour packages as difficult to organize (See Figure 2).

Perceived tourism promotional factors: Participants were asked to rank order six tourism promotional factors that would improve the promotion of U.S. ski tour packages. Smaller numbers with the minimum of one indicated the most significant while larger numbers with the maximum of six indicated the least significant. Transportation and accommodations were ranked as the primary concern for Japanese tour operating professionals. Conversely, ski resort attractions, such as programs and events offered by the resort as well as after-ski activities, were ranked as the least important tourism promotional factor. There was no clear consensus among tour operating professionals about the value of promotional campaigns of U.S. ski resorts. Nineteen percent of the respondents indicated promotional campaigns directed by U.S. ski resorts to be the primary tourism factor in order to improve promotion of U.S. ski packages. However, an equal number considered it to be the least important (See Table 4 and Figure 3).

DISCUSSIONS

The perceived promotional activity level of Japanese tour operators toward U.S. ski resorts was found to be neither active nor inactive. It was rather neutral. Japanese tour operating professionals had limited knowledge of U.S. ski resorts. These findings suggested that they were still in the infancy stage of developing a skier market from Japan to the United States. The level

of knowledge Japanese tour operating professionals have of U.S. ski resorts was significantly associated with the degree to which they perceived their organization's attitude toward promoting U.S. ski tour packages to Japanese skiers.

Their level of knowledge was also found to be significantly associated with how actively they were willing to promote ski tour packages to the United States. The results, therefore, suggested that how tour operating professionals perceive their companies' promotional activity level toward U.S. ski tour packages was influential on how they feel toward promoting them. This finding was actually expected. It is obvious that when a company sells a product, its employees should become knowledgeable about the product which they promote. Consequently, it can be concluded that tour operating companies have a significant influence on their professionals' desire to promote particular ski destination packages. This conclusion further supported the implication that knowing the attitude of Japanese ski tour operators toward promoting U.S. ski tour packages would be the initial step for U.S. ski resorts to position themselves in this marketplace. A good approach for U.S. ski resort marketers may be familiarizing Japanese tour operators to their resorts.

Japanese tour operating professionals were found to be attracted to physical attributes of ski terrain in the western United States. Nevertheless, attributes perceived as negative on the part of tour operating professionals, especially when deemed essential to the ski packages, would deter them from promoting ski tour packages. The Japanese tour operating professionals identified transportation and accommodations as the most important tourism promotional factors in order to improve the

promotion of U.S. ski tour packages. The results suggested that the improved marketing of U.S. ski resorts could be achieved by eliminating negatively perceived factors as well as emphasizing the positively perceived physical attributes of ski resorts. Tasks, such as improving poor accessibility to and from the airport, easing the minimum nights stay policy required for tour packages, and hiring a bilingual staff, may be effective for ski resorts to start dealing with.

The current study measured the promotional activity level of Japanese tour operating companies from the perceptions of their employees. If it had been measured more quantitatively, the results could have become more persuasive. This suggests that the data, such as the actual number of skiers a tour operating company sent to the United States in the previous year or the percentage of the sales of U.S. ski tour packages among all that they have produced in the previous

year, should be collected. However, the results obtained from this study will still provide marketing specialists at U.S. ski resorts with useful information about the Japanese market. Tour operating companies are the first and the most significant outlet for developing Japanese skiing clientele at U.S. ski resorts. If marketers at U.S. ski resorts decide to target Japanese tour operating companies and professionals as a market, an increase in tour professionals' knowledge and promotional motivation of U.S. ski resorts will result. Therefore, it is desirable for both U.S. and Japanese professionals to enhance international promotional efforts in order to develop a new market for the U.S. ski resorts. Mutual marketing efforts, such as public relations, cost reduction of tour packages, and familiarization tour for tour operating professionals, will stimulate positioning the U.S. ski resorts in the Japanese market and eventually result in increased Japanese skiers at each resort.

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Figure 1: Knowledge & Promotional Motivational Level

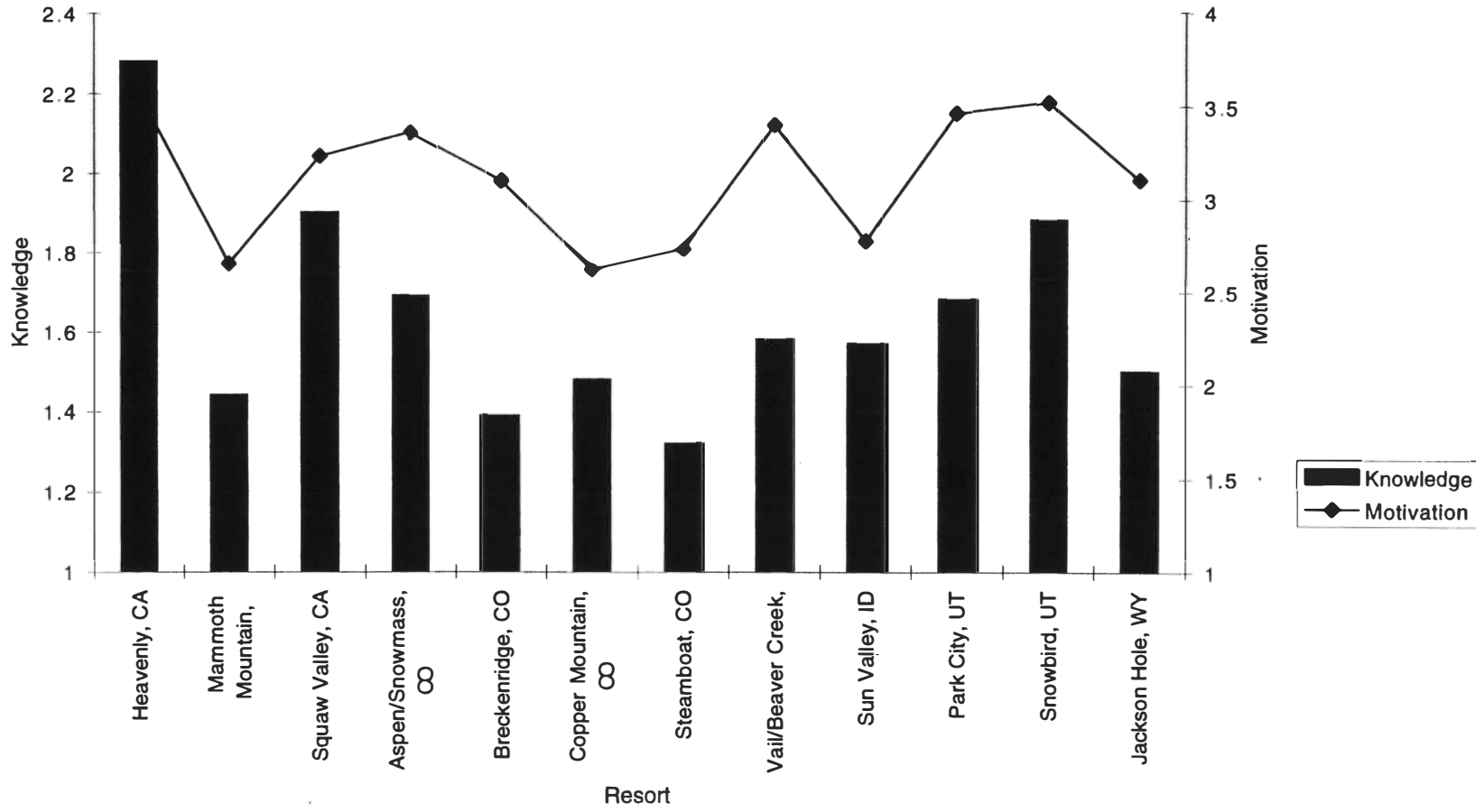
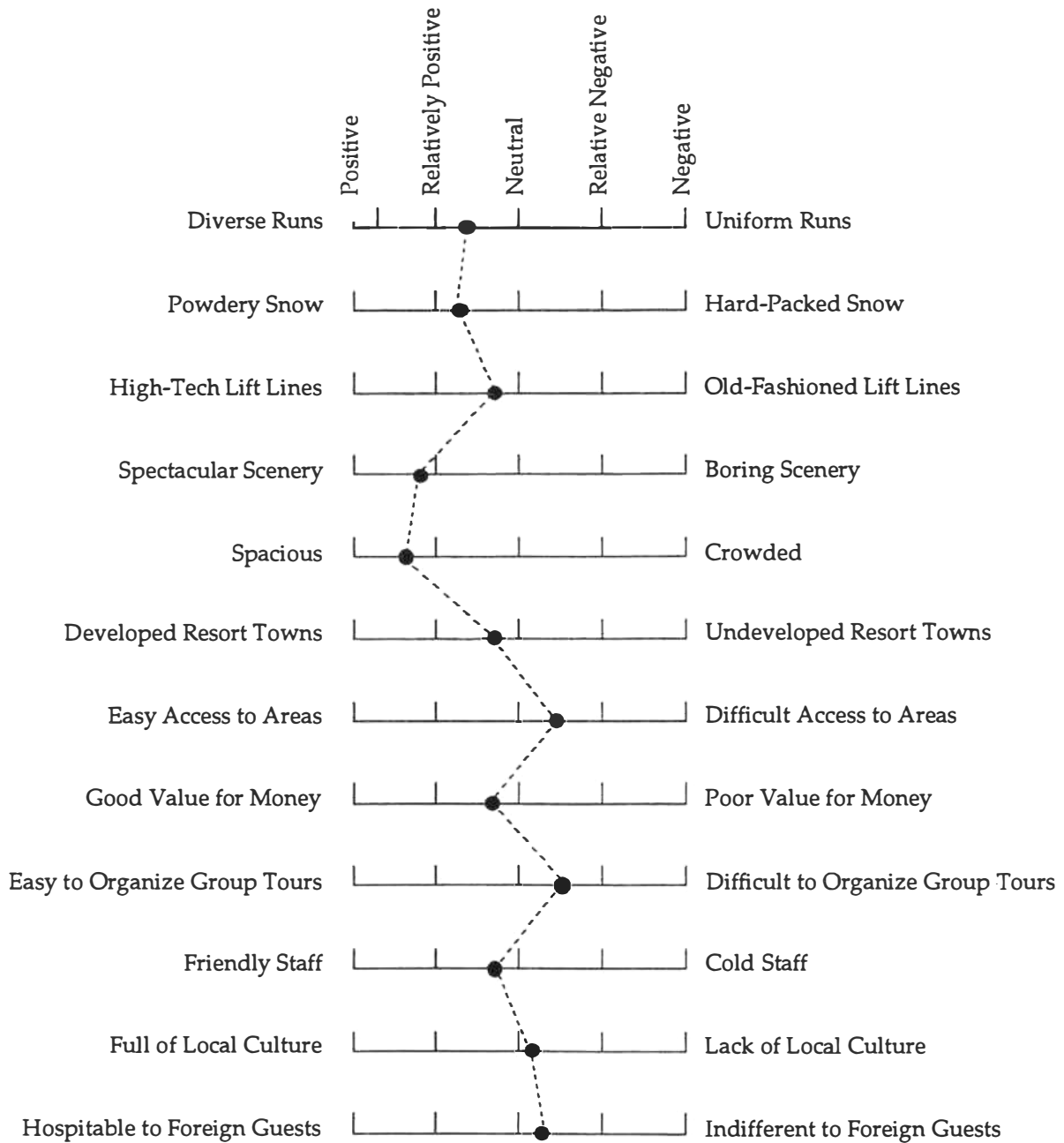


Figure 1

Figure 2

Japanese Tour Operating Professional's Image of U. S. Ski Resorts



Rank Order of Perceived Importance of Promotional Factors

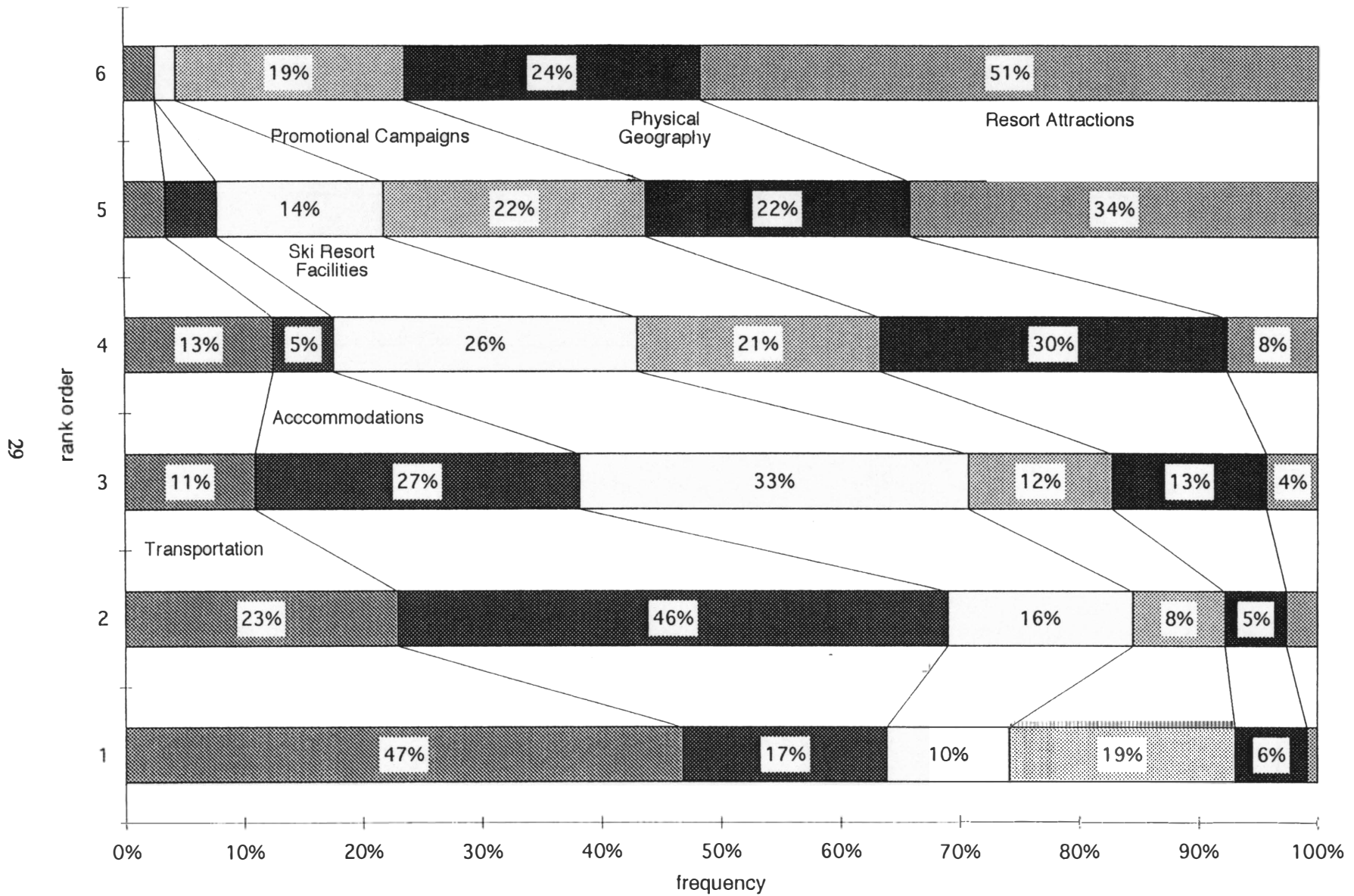


Figure 3

Transportation
 Accommodations
 Ski Resort Facilities
 Resort Promotional Campaigns
 Physical Geography
 Resort Attractions

Table 1

Demographic Data of Japanese Tour Operating Professionals

Variables	N	Description	Frequency	Percentage
Sex	137	Male	84	61.3%
		Female	53	38.7%
Age	137	20-29	83	60.6%
		30-39	36	26.3%
		40-49	12	8.8%
		50-59	4	2.9%
		Over 60	2	1.5%
Years of Professional Experience	125	Less than 5	74	54.0%
		5-9	36	26.3%
		10-14	11	8.0%
		15-19	7	5.1%
		20-24	5	3.6%
		25-29	2	1.5%
		30-34	0	0
		35-39	2	1.5%
		More than 40	0	0
Area of a Firm Located	137	Hokkaido/Tohoku	2	1.5%
		Kanto	116	84.7%
		Chubu	2	1.5%
		Kinki	3	2.2%
		Chugoku	5	3.6%
		Kyushu/Okinawa	9	6.6%
Degree of U.S. Ski Packages Promotion	137	Active	7	5.1%
		Moderately active	27	19.7%
		Indifferent	38	27.7%
		Relatively inactive	21	15.3%
		Inactive	44	32.1%
Years of Experience in Skiing	137	Less than 5	64	46.7%
		5-9	31	22.6%
		10-14	20	14.5%
		15-19	7	5.1%
		More than 20	15	10.9%

Variables	N	Description	Frequency	Percentage
Annual Ski Days	137	Less than 10	100	73.0%
		10-29	34	24.8%
		30-49	1	.7%
		More than 50	2	1.5%
Ski Ability	135	Beginner	55	40.7%
		Intermediate	63	46.7%
		Advanced	14	10.4%
		Professional	3	2.2%
Experience in Skiing Abroad	136	Never	83	61.0%
		1-3 times	32	23.5%
		4-6 times	9	6.6%
		7-9 times	2	1.5%
		More than 10	10	7.4%
Experience in Skiing in the United States	137	Never	116	84.7%
		1-3 times	15	10.9%
		4-6	4	2.9%
		7-9 times	1	.7%
		More than 10	1	.7%

Table 2

Japanese Tour Operating Professionals' Knowledge of U.S. Ski Destinations

Variables	N	Mean	SD
Heavenly, CA	135	2.28	1.15
Mammoth Mountain, CA	135	1.44	0.78
Squaw Valley, CA	136	1.90	0.99
Aspen/Snowmass, CO	136	1.69	0.94
Breckenridge, CO	136	1.39	0.92
Copper Mountain, CO	136	1.48	0.85
Crested Butte, CO	136	1.16	0.51
Keystone, CO	136	1.24	0.68
Steamboat, CO	136	1.32	0.70
Telluride, CO	136	1.16	0.52
Vail/Beaver Creek, CO	136	1.58	1.01
Winter Park, CO	136	1.27	0.66
Sun Valley, ID	136	1.57	0.76
Taos, NM	136	1.24	0.58
Park City, UT	136	1.68	1.15
Snowbird, UT	136	1.88	1.18
Jackson Hole WY	136	1.50	0.91
Total		1.52	0.84

Table 3

Japanese Tour Operating Professionals' Motivation to Promote U.S. Ski Destinations

Variables	N	Mean	SD
Heavenly, CA	53	3.57	1.10
Mammoth Mountain, CA	17	2.65	1.06
Squaw Valley, CA	30	3.23	1.01
Aspen/Snowmass, CO	28	3.36	0.68
Breckenridge, CO	11	3.10	1.58
Copper Mountain, CO	13	2.62	0.96
Steamboat, CO	11	2.73	0.79
Vail/Beaver Creek, CO	25	3.40	1.23
Sun Valley, ID	13	2.77	0.73
Park City, UT	26	3.46	1.14
Snowbird, UT	31	3.52	1.21
Jackson Hole, WY	20	3.10	1.21

Table 4

Rank Order of Importance Promotional Factors for the Improvement of
U.S. Ski Packages Promotion

Rank	Variables	1	2	3	4	5	6	N	Mean
1	Transportation	55	27	13	15	4	3	117	2.10
2	Accommodations	20	54	32	6	5	0	117	2.33
3	Ski Resort Facilities	12	18	38	30	16	2	116	3.22
4	Promotional Campaigns by Ski Resorts	22	9	14	24	25	22	116	3.75
5	Physical Geography	7	6	15	34	25	28	115	4.29
6	Ski Resort Attractions	1	3	5	9	39	59	116	5.23
