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Tourism to Japan: Quantitative analyses on perceived image of Japan as a Travel Destination

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Tourism to Japan: Quantitative Analyses on Perceived Image of Japan as a Travel Destination

July 2010

Japan International Transport Institute, USA (JITI)

**The Dick Pope Sr. Institute of Tourism Studies
Rosen College of Hospitality Management
University of Central Florida**



Tourism to Japan: Quantitative Analyses on Perceived Image of Japan as a Travel Destination

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Executive Summary

While some previous reports in Japanese claimed several factors as important and effective to attract foreign visitors to Japan, namely inbound visitors, this report may be the one of a few with scientific and quantitative data analysis to back up the findings. Respondents' profiles were collected at the same time so that we can not only view the general profiles of respondents but also conduct advanced statistical analyses.

[Brand Image of Japan]

You cannot sell your products without perception of brand image in the minds of consumers. There are many alleged Japanese attractions which have been identified by the previous studies in Japan, but they seldom asked the opinions of foreign nationals directly. Those alleged attractions of Japan have not been verified quantitatively and that is the main purpose of the Japan image related study. We choose the following items and asked the respondents whether their perceptions are associated with Japan.

Food, old culture, contemporary culture, high technology, tourism destination, science, longevity, modern literature, movies, modern products, manner of people, character goods, spirituality, mountain, ocean/sea and high-speed rail/Shinkansen.

The result of this study shows that "food", "old culture", "high-technology", "modern products" and "high-speed rail/Shinkansen" image are the strong attractions to be associated with brand image of Japan, which appears consistent all across the respondents.

In the meantime, "modern literature", "movies" and "ocean/sea" generated relatively lower image associated with "Japan" lacking consistent brand image associated with Japan. Relatively large standard deviation with those perceptions indicate smaller numbers of respondents who associate Japan with such attractions, which can be a valuable information as to the strategy formation of how to sell the brand image of Japan as a tourism destination. Research result indicates that you can use "food" and "high-technology" to attract general population, for example, but you should not use "modern literature" or "movies" to draw general population. It can be suggested that "movies" and "modern literature" can be used to extract special segment of the core fans out of general public first, then you can start effective brand campaign of Japan to the specific segments with focused communication. With scientific data, a likelihood of failure in Japan destination campaign would be reduced.

[Perceptions about Traveling to Japan]

Second set of eight questions were conducted regarding respondents' perception about a travel to Japan, so that we can identify relative attractions and possible obstacles in the minds of respondents.

Perception may be different from facts, but perception would be very powerful to affect consumers' behavior. We found that a perception about airfare to Japan being too expensive existed fairly consistently, which can be one clear source of problems for Japan's effort to increase inbound tourists to Japan. Perceptions about domestic transportation costs and about hotels being too expensive still exist, but not as serious as the airfare. Japanese government may consider joint promotion with travel-related companies both in Japan and in the USA about affordability of airfares to Japan, because there are clear

signs that people wish to visit Japan due to some strong attractions, only hindered by the perception of prohibitive costs of airfares. Planned increase in direct flight capacity to Tokyo (Narita and Haneda) should present a wonderful opportunity for marketing campaign to update people's perception about "expensive flights to Japan". Another source of problems that we identified was the perception of language barriers with large standard deviation, indicating confusion among general public about the facts. In the meantime, respondents perceive that English information about Japan is available at the same level as English information about European nations, so the perception about language barrier in Japan should be addressed to calm the anxiety of those who never visited Japan. While majority of respondents express genuine interest in traveling to Japan, it is a pity that some perception about Japan appear to be preventing them from taking an action to travel to Japan.

[Motivating Factors to Travel to Japan]

There have been sincere efforts by Japanese to attract more tourists to Japan. Japan tried many different things in the past, such as promoting Western foods, traditional cultures, pop culture etc. But there has been a little trace that Japanese actually asked simple and important questions of what really matter in the minds of potential inbound visitors.

In this section, we asked respondents relative importance of twenty-one factors for their trip to Japan. Those include, "UNESCO World Heritage Sites", "Level of safety and security", "availability of night life" etc, and mainly collected from previous publications by various Japanese government offices promoting tourism. Our purpose is to demonstrate that at least relative importance of those twenty-one items would not be equal in the perceptions of respondents, showing that some are more important than others.

The results show that "Friendly and Hospitable Hosts" "Affordable Accommodations" "Reliable Transportation Network" and "Level of Safety and Security" turned out to be the more important factors in making a trip to Japan. While Japanese may often guess that foreign visitors love to see "pop-culture", Japanese just have to ask those questions directly to potential tourists before making any unilateral assertions.

Least important factors include "Restaurant with Western Foods", "Modern popular culture (anime, manga)" and "Contemporary fashion trends". This result, however, should be interpreted carefully because of existence of large standard deviation, which underscores the importance of segmentation strategy to enhance the brand image of Japan. For certain group of people, pop-culture would be highly effective to sell the brand image of Japan, but those tactics may not be effective in communicating to general mass of foreign nationals.

[Comments by Respondents]

Out of 194 respondents, more than half typed up some comments in the open spaces of the survey, which we believe is very impressive, reflecting high levels of interests in Japan among samples. With 2/3 of the respondents had prior travel experience to Japan, it is surprising that Japan has such a strong brand image even among those 1/3 who have never traveled to Japan. Reading through the comments will give highly useful insights about how the foreigners perceive Japan and its brand image, as well as detailed depiction of their experiences of traveling in Japan.

「旅行先としての日本イメージの定量的分析」報告書要旨の日本語訳

本調査は、2010年3月より7月にかけて、財団法人運輸政策研究機構・国際問題研究所・在ワシントン研究室(JITI)とセントラルフロリダ大学が協働して実施したものである。

「データ収集」

質問状は、米国学術基準によるセントラルフロリダ大学内委員会の認可を得た上で、JITI及びその協力者のメイリングリストにある対象者(米国ワシントンDC及び近隣在住者が中心)に対しオンラインベースの質問状への回答を促すのに加え、JITIのウェブサイト上でも協力を呼びかけるとい形で実施し、その結果は米国セントラルフロリダ大学の機密性を保たれたサーバーに直接送付される形で、参加者の個人情報は一切収集しない形式でデータが収集された。これらの参加者の協力を得て、最終的には200名弱から有効回答を得た。(統計調査の締切期日後の回答であったため統計データ解析には反映できなかったものについても、コメントは抽出して掲載した。)

当調査では家計年収、最終学歴、性別、人種、就業状況、年齢層等のプロフィールも調査しているが、年収平均の点で若干高所得者が多い他は、比較的バランスの取れたサンプルで、うち過去の日本往訪経験者は60%であった。観光に関連する多くの質問により、回答者が持つ定性的な感性や感覚を、数的な定量データに落とし込み、これら収集データを基本的統計分析及び応用統計分析の手法で定量的に検証し、データから日本観光経営に役立つ経営情報を抽出する手法を採用した。

「日本のイメージ」

日本の特色を表すと思われる各種要素については、これまでも日本人による憶測による提案がなされてきているが、実際に外国人に意見を聞いたものであるかは不明であるため、今次、「料理、伝統文化、現代文化、ハイテク、観光目的地、科学、長寿、近代文学、映画、近代製品、人の素養、キャラクターグッズ、精神性、山、海岸と海、高速鉄道・新幹線」という単語を聞いた際にどの程度日本をイメージするかを調査した。結果としては、料理、伝統文化、ハイテク、高速鉄道・新幹線のイメージが強いことが明らかになった。一方で近代文学、映画等は弱い、又はイメージの受け止め方に混乱がみられることが判明した。

消費者はブランドイメージのある物は購入するが、消費者にブランドイメージが無い物を購入させるのは至難の業である。この調査結果は、米国人大衆に日本を売り込む際には、料理、ハイテクの分野を押し出すと宣伝投資効果がより高いことを示している。これに対し、近代文学や映画による日本ブランド促進はそうした効果が弱く、不特定多数の大衆を念頭に置いた場合には、これらの題材をテーマにした一方的なセールス活動では投資効果効率には難があることを示唆している。むしろその類の特殊な日本文化イベントをまず企画し、そこに来訪したセグメントを一般大衆から篩い分けた上で、それら共通嗜好を持つコアのファンに向けて日本の特別な商品売り込むというような科学的戦略を構築する余地があろう。

日本のイメージ構築に際しては、日本人が「外国人から見た日本のイメージはこうだろう」と推測するよりも、組織的・定量的な調査を、中立性を期す観点から日本関連でない第三者に実施させ、実際に外国人から情報収集することがより正確で提案事項の外れリスクも少ないと思料される。

「訪日阻害要因」

次に、日本へのインバウンド客を促進するビジットジャパンキャンペーンにも関連するが、対象者全体では日本への関心と旅行希望は高いにもかかわらず「何故実際の訪日旅行が実現しないのか」について理由を掘り下げ、どのような要素が対象者の心の中で旅行の実現に際し問題となっているかを調査した。

結果としては往復航空券の高価さに関する思い込みが相当深刻な訪日旅行阻害理由であることが判明した。しかしながら、実際にワシントンDCから日本、中国、韓国の東アジア3カ国と英独仏の首都への格安往復航空券を同日、同期間で検索してみたところ、日本行きは逆に最も低価であるという事実があり、恐らく過去にマスコミから集中的に報道された「日本は全てが高い」というイメージが長年に渡り更新されていないことが定量的に裏付けられた。

また日本往訪時の懸念として言語ギャップに恐れを抱く人間が多い事も判明したが、訪日経験の有無がこの懸念を大きく左右するという事も統計解析で明らかになった。実際に旅行した事が無いのに「日本は英語が通じないので不安だ」という認識を持たれているという事実は、受け入れ側の日本による組織的なマーケティングの課題と必要性を示唆している。本文では更に、性別、年齢、そして日本語学習経験の有無等の事実と言語ギャップ問題の相関関係を解析しており、それらマーケティングのヒントを提示している。

「ようこそジャパンキャンペーン：諸刃の剣」

なお、統計解析の結果として、「Yokoso」とあえて、簡易な日本語音声を外国人向けに敢えて活用した「ようこそジャパン」キャンペーンは諸刃の剣であること、つまり、日本語学習経験がある又は文化に既に興味を持っているセグメントにはその興味を深める意味で効果的であったものの、訪日経験が無く言語ギャップを恐れているようなセグメントには、逆効果で既に持たれていた不安を増幅してしまったという統計解析結果が出てきた。今後の日本政府の観光促進キャンペーンに科学的なデータ解析を生かす必要性を示唆している。

「訪日旅行の動機付け」

訪日旅行の動機付けとしてどのような要素が重要かを定量的に調査したのが次の部分である。「世界遺産、西洋料理の存在、夜遊び、ポップカルチャー」等21項目を挙げてどれが日本への旅行決定に重要かを調査したところ、極めて興味深い結果が判明した。日本人が「外国人の好みはこれだ」と一方的に信じ込んでいるものが必ずしも重要な要素リストに入らず、「友好的で接遇心に富んだ人との出会い、低価格の宿泊施設、信頼性の高い輸送手段、公共の安全」が重要な要素として嗜好されている。「低価格の宿泊施設」はそれが実は東京や京都、大阪のような大都市でも存在するという日本の対外マーケティング強化の必要性を示しているが、「友好的で接遇心に富んだ人との出会い、信頼性の高い輸送手段、公共の安全」等は、日本人の間で議論する際にこれらが外国人にとっての日本の魅力であるという認識そのものが低いように見受けられる点で、興味深い。

高速鉄道・新幹線が訪日外国人観光客にとっての観光資源になるという点は日本でも理解され始めていると思われるが、「公共輸送手段全体の信頼性・安全性の魅力」というものが米国人が訪日を決定する際に重要な要素を占めるという結果に対しては、日本の観光資源として宣伝していくという観点がまだあまり強く認識されていないと思われる。

逆に訪日旅行の動機付けとしてさほど重要でないという要素には「西洋料理の提供、現代ポップカルチャー、ファッション動向」等が上がった。回答者が年齢、年収等でかなり多様性があった

にも拘らずこのような結果が出てきた点を重視したい。この点で、実際の消費者である外国人の趣味嗜好を定量的に調査する点の重要性が確認されるとともに、前述した観光商品供給者である日本人側で一方向的に外国人インバウンド客向けの観光商品を絞り込むことの高さが浮き彫りになったと思料される。例えば一部のコメントでは「日本側があまりに特殊な若者文化を強調するせいかもしれないが、そのイメージが現実のものならば日本には行く気がしない」という声もあった。セグメンテーション(趣味嗜好等の同様なグループ分けをした上で、それぞれのグループのニーズに沿った日本のイメージや観光商品を提供する)の分析を正しく行った上でないと、たとえ豊富な観光資源イメージがあっても、大衆向けのマーケティングコミュニケーションにおいて失敗をしてしまう可能性がある。

今後少子化高齢化が進行するにつれ、現状で日本国内観光消費の95%を占める日本人による観光消費に拡大の余力を期待できない中、急成長を見込めるセグメントである訪日外国人観光客を増やすことは、国内輸送機関や空港の利用発展・地域経済活性化にも貢献する。インバウンド客促進は、通貨が国家・地域に流入するが故に、輸出産業と同様の経済効果が認められる。しかしながら「輸出先の趣味嗜好調査結果に合わせた製品を生産する」という製造業では当たり前の成功モデルが、インバウンド観光分野ではまだ奨励されていないように見える。

今後日本がインバウンド客を組織的、構造的に増やすには、潜在的顧客の趣味嗜好を実際に調査してそれに合致した観光商品を国内地域在庫の中から組み合わせて提供するという、米国で発達したデスティネーションマーケティングの発想と手法が提言される。生産者が消費者の嗜好を勝手に想像し決めつけるのではなく、消費者の趣味嗜好を細かく実際に聞くことで、同様の嗜好を持つ潜在顧客をセグメント別にくくり、そのグループ別にきめ細かい観光商品を提供していく事が大切である。

また日本のイメージ形成、海外の日本ファン構築のためには、「魚影の濃い場所を検索しそれぞれの魚が食べたい好物を的確に提供して釣る」という定量的なマーケティング調査を実施するなど、費用対効果を意識した活動が必要である。その基本概念はインバウンド調査に利用するデスティネーションマーケティング手法と同様である。

当報告書は限られた予算と時間で作成された点、及び当該データは米国居住者全員の様子を忠実に表明するサンプルでなく、検証内容は米国他州居住者や他国居住者にそのまま適用するのは無理があろう点を理解した上で、この種の定量的調査の戦略的重要性に同意して頂ければ、幸甚である。

Purpose of the Report

Japan International Transport Institute, USA (JITI) commissioned the Dick Pope Sr. Institute of Tourism Studies of the Rosen College of Hospitality Management to investigate the perceived image of Japan and its potential as travel destination among sample residents in the East United States. This assignment was formalized through Award No. 12018024 to the University of Central Florida.

The above purpose consists of the following assignments:

- Collecting primary data by way of conducting online-based survey to sample residents in East Coast of the USA.
 - Perceived image of Japan
 - Relative importance of various factors to initiate a trip to Japan
 - Personal profiles of respondents, who remain anonymous to protect personal information
- Conducting descriptive statistics on the data for prime analysis
- Conducting selected inferential statistical analysis by verifying any significant correlations among responded data and their profiles

These assignments will generate analyses that will facilitate the quantitative evidences on for effective marketing strategies for Japan as a tourism destination to be submitted to the JITI.

This report documents the first assignment, namely the quantification of perceived image of Japan and its potential as a tourism destination. It attempts to depict any significant associations among various factors regarding the patterns of respondents' reply about image of Japan and its potential as tourism destination as accurately as possible. This assignment was developed by Dr. Abraham Pizam and Dr. Tadayuki Hara from the Rosen College of Hospitality Management with contributions from Mr. Tadashi Kaneko, the Senior Representative of the Japan International Transport Institutes (JITI) Washington, DC office.

Limitations

Due to the size of samples and sampling methods, careful consideration would be required to extrapolate our findings to general population.

While majority of data were collected mainly from the mailing list of the sponsor, JITI, the other parts were collected from general public via JITI's affiliates. In terms of age groups distribution, we have very flat distribution, but in terms of household income and highest educational record, we have larger proportions of respondents with high levels which are not considered in line with the general characteristic of the larger population.

Samples are collected mainly from residents of Virginia, Maryland and Washington DC area, which may not be accurate representation of the rest of the populations in the United States of America. Unless the similar research would be conducted with all other strategic feeder nations, such as Korea, China, Taiwan, France, Germany, Australia etc, it is not advisable to simply apply findings of this report to those different feeder markets.

We sincerely recommend that similar research be conducted directly with different nations to ensure the effectiveness of Japanese global marketing efforts.

Summary Findings of the Report

In about two weeks' duration, 194 respondents submitted the online survey. Out of 194, 192 were considered as valid replies as the two had more than half the questions unanswered, as if they were submitted prematurely by mistake. The analysis will be based on valid sample data of 192. Due to missing responses to some of the questions, the numbers available for analyses may be slightly less than 192 for each question.

In the first part of the survey findings, we discuss what we see in each data by using descriptive statistics. That would include basic quantitative analyses such as means, standard deviations, or plotting data by simple histograms. Survey results also show the full, unedited comments that part of the respondents typed up as they are.

In the second part of the survey findings, we utilize inferential statistics to verify whether some significant relationship exist between or among some variables, and discuss what those quantitative numbers mean.

I. Survey Findings – Descriptive Statistics

Survey finding are discussed in five sections. First part deals with image of Japan by identifying which words or short phrases are perceived to be associated with Japan. Second part deals with perceptions of Japan as a travel destination, to verify which issues, if any, would be considered as discouraging or encouraging issues in planning a trip to Japan. Third part deals with possible factors of importance when respondents make a decision to travel to Japan. Fourth part is to ask profiles of respondents in terms of gender, race, highest educational attainment, annual household income level, age group, previous trip to Japan and Asia, language skill, and intent to travel to Japan in the future. Fifth part includes all the unedited comments by the respondents, which at this moment are not processed in statistical analysis.

1. Survey findings- Image

The survey has two parts. First part is to ask the image of Japan and the relative importance of various factors when respondents consider a travel to Japan. Questions from 1-1 to 1-16 are to ask respondents about the image of Japan.

1 When you hear “Japan”, what is the image that comes to your mind?

- 1-1 ○ Food (sushi, chopsticks etc)
- 1-2 ○ Old Culture (samurai, geisha, kabuki, sumo etc)
- 1-3 ○ Contemporary Culture (anime, manga, karaoke, school girl uniforms)
- 1-4 ○ High technology
- 1-5 ○ Tourism destination
- 1-6 ○ Science
- 1-7 ○ longevity
- 1-8 ○ modern literature
- 1-9 ○ movies
- 1-10. ○ modern products
- 1-11. ○ manner of people
- 1-12. ○ "character goods"
- 1-13 ○ Spirituality (Zen etc)
- 1-14. ○ mountain
- 1-15. ○ ocean/sea
- 1-16. ○ High speed Rail/Shinkansen

Respondents are requested to choose one of the followings;
Highly likely = 5, likely = 4, neutral = 3, unlikely = 2, highly unlikely = 1.

Descriptive Statistics: Q1_1, Q1_2, Q1_3, Q1_4, Q1_5, Q1_6, Q1_7, Q1_8, ...

Variable	N	Mean	SE Mean	StDev	Minimum	Maximum
Q1_1	191	4.2565	0.0640	0.8839	2.0000	5.0000
Q1_2	192	4.3958	0.0581	0.8055	2.0000	5.0000
Q1_3	190	4.1368	0.0705	0.9717	1.0000	5.0000
Q1_4	191	4.5288	0.0462	0.6390	3.0000	5.0000
Q1_5	189	4.2434	0.0664	0.9133	2.0000	5.0000
Q1_6	189	4.1005	0.0702	0.9651	1.0000	5.0000
Q1_7	191	3.8796	0.0761	1.0519	1.0000	5.0000
Q1_8	188	2.6330	0.0812	1.1131	1.0000	5.0000
Q1_9	190	3.2368	0.0877	1.2092	1.0000	5.0000
Q1_10	189	4.3175	0.0549	0.7543	1.0000	5.0000
Q1_11	186	4.2796	0.0623	0.8494	1.0000	5.0000
Q1_12	190	3.7526	0.0823	1.1348	1.0000	5.0000
Q1_13	187	3.7005	0.0783	1.0707	1.0000	5.0000
Q1_14	191	4.0105	0.0700	0.9678	1.0000	5.0000
Q1_15	189	3.6825	0.0796	1.0939	1.0000	5.0000
Q1_16	191	4.2984	0.0676	0.9347	1.0000	5.0000

[Short Comments]

- **Q1-1 “Food”, Q 1-2 “Old Culture” and Q1-4 “High-technology”** appear to have consistently higher image (Mean of 4.25, 4.39 and 4.52) with smaller Standard Deviation (StDev of 0.88, 0.80 and 0.63). This means that when Japan wishes to market general brand image, “Food” “Old Culture” and “High-technology” are more likely to succeed in confirming people’s association with Japan.
- **Q 1-10 “Modern Products” and Q1-16 “High Speed Rail/Shinkansen”** have relatively stronger association with Japan (Means of 4.31 and 4.29) with smaller Standard Deviation (StDev of 0.75 and 0.93 respectively). It appears that co-existence of old culture and modern products may be one source of fascinations to respondents, which can be confirmed in their comments section later.
- **Q1-8 “Modern Literature”** has very low image (Mean of 2.63) with relatively large standard deviation (StDev of 1.11). This means that the general likelihood of creating brand image of Japan with “Modern literature” would be low, even though there appears to be smaller number of people who are the followers of modern literature.
- **Q1-9 “Movies”** has the second lowest image associated with Japan (Mean of 3.23) with the largest standard deviation (StDev of 1.20). This means that movies may not be the most effective mean of attracting general mass market but there appear to be some smaller number of people who are the core fans of Japanese movies.
- **Q1-15 “Image of Ocean/Sea”** appears to be confusing with relatively high standard deviation among respondents (StDev of 1.09), even though the mean number is not too low (Mean of 3.68).

2 Survey Findings – Perceptions about Traveling to Japan

From Q2 to Q9, respondents were asked to express their degree of agreement/disagreement to eight different statements.

- 2 *“Airfare to Japan is too expensive compared with other destinations”*
- 3 *“Transportation costs in Japan are too expensive compared with those in other countries”*
- 4 *“Prices of hotels in Japan are too expensive compared with those in the USA or other countries”*
- 5 *“Japan as a tourist destination is similar to Korea and China in terms of culture”*
- 6 *“Japan as a tourist destination is similar to Western Europe in terms of modern amenities”*
- 7 *“Japan as a tourist destination is similar to Korea and China in terms of modern amenities”*
- 8 *“I will be afraid of language barriers when I travel to Japan”*
- 9 *“Travel information on Japan in English is less available compared with European countries”*

Strongly Agree = 5, Agree = 4, Neutral = 3, Disagree = 2, and Strongly disagree = 1

Descriptive Statistics: Q2, Q3, Q4, Q5, Q6, Q7, Q8, Q9

Variable	N	Mean	SE Mean	StDev	Minimum	Maximum
Q2	189	3.5661	0.0697	0.9577	1.0000	5.0000
Q3	191	3.3717	0.0694	0.9586	1.0000	5.0000
Q4	188	3.4468	0.0810	1.1102	1.0000	5.0000
Q5	189	2.2116	0.0711	0.9772	1.0000	5.0000
Q6	188	3.4840	0.0828	1.1351	1.0000	5.0000

Q7	187	2.5187	0.0663	0.9060	1.0000	5.0000
Q8	190	2.6526	0.0853	1.1753	1.0000	5.0000
Q9	189	2.8995	0.0737	1.0134	1.0000	5.0000

Among those questions, 2 “airfare” and 4 “price of goods in Japan” are identified to raise some concerns.

It is obvious that Japan suffers from the perception of “airfare to Japan being too expensive”, (Mean = 3.56) and people are rather consistent on the perception (StDev=0.95).

Relatively large SD (1.11) indicates that “perception of prices of hotels too expensive” may be one of the problem areas of Japan’s perception as travel destination. There appears to be convincing evidences that Japan is not considered to have similar culture with Korea and China among the respondents.

3 Survey Findings – Perceptions about Traveling to Japan

Having looked through the previous image research and travel-related survey on Japan, we noticed that few research papers appear to have actually asked foreign nationals about the importance of each factors when making a trip to Japan. Instead, Japanese people have just asserted important things for foreign visitors without actual inquiries of foreigners’ opinion. From Q10 to Q30, respondents were asked to express their relative importance of 21 different items of possible concern when they travel to Japan. We hope this will underscore the importance of field survey.

Which of the followings factors would be important to you if you were to visit Japan? Please choose the degree of importance for each factor.

(5=highly important, 1 = least important)

- 10 Local food
- 11 Large metropolitan cities
- 12 Natural beauty & landscape
- 13 traditional cultures
- 14 Modern designs of (tangible products, such as cars, buildings, and electronics)
- 15 Contemporary fashion trends
- 16 Modern popular culture (anime, manga)
- 17 UNESCO World Heritage Sites
- 18 Level of safety and security
- 19 Cleanliness of cities and public spaces
- 20 Reliable transportation network
- 21 Accommodations with modern amenities
- 22 Restaurants with Western foods

- 23 Availability of English Signs
- 24 Affordable Accommodations
- 25 Availability of various forms of entertainment
- 26 Availability of night life
- 27 Availability of Cultural Attractions
- 28 Friendly and hospitable hosts
- 29 Being able to communicate with locals in English
- 30 Being able to understand historical backgrounds of local events in English

Descriptive Statistics: Q10, Q11, Q12, Q13, Q14, Q15, Q16, Q17, ...

Variable	N	Mean	SE Mean	StDev	Minimum	Maximum
Q10	191	4.1937	0.0630	0.8701	1.0000	5.0000
Q11	190	3.4842	0.0711	0.9798	1.0000	5.0000
Q12	190	4.3526	0.0510	0.7029	2.0000	5.0000
Q13	188	4.3085	0.0539	0.7389	1.0000	5.0000
Q14	189	3.2751	0.0804	1.1053	1.0000	5.0000
Q15	189	2.6984	0.0897	1.2330	1.0000	5.0000
Q16	185	3.0865	0.0958	1.3035	1.0000	5.0000
Q17	189	4.1217	0.0615	0.8449	1.0000	5.0000
Q18	188	4.2234	0.0680	0.9325	1.0000	5.0000
Q19	188	4.0691	0.0613	0.8405	1.0000	5.0000
Q20	189	4.4550	0.0440	0.6052	1.0000	5.0000
Q21	189	3.9365	0.0608	0.8355	1.0000	5.0000
Q22	187	2.3904	0.0828	1.1324	1.0000	5.0000
Q23	191	3.6545	0.0699	0.9657	1.0000	5.0000
Q24	189	4.2540	0.0437	0.6006	2.0000	5.0000
Q25	190	3.4579	0.0649	0.8943	1.0000	5.0000
Q26	189	2.9577	0.0786	1.0809	1.0000	5.0000
Q27	186	4.2688	0.0502	0.6840	2.0000	5.0000
Q28	186	4.2151	0.0449	0.6125	1.0000	5.0000
Q29	184	3.3370	0.0717	0.9726	1.0000	5.0000
Q30	189	3.8307	0.0642	0.8830	1.0000	5.0000

- Important factors to decide to make a trip to Japan include;
 - Q12 “Natural beauty & landscape” (Mean=4.35 SD=0.70),
 - Q13 “traditional cultures” (Mean=4.30 SD=0.73),
 - Q18 “Level of Safety and Security” (Mean 4.22, SD=0.93)
 - Q20 “Reliable Transportation Network” (Mean=4.45, SD=0.60)
 - Q24 “Affordable Accommodations” (Mean=4.25 SD=0.60),
 - Q27 “Availability of Cultural Attractions” (Mean=4.26 SD=0.68),
 - Q28 “Friendly and Hospitable Hosts” (Mean=4.21 SD=0.61),

Japan cannot sell the product (=a trip to Japan) without image of the brand (=Japan as a tourism destination). Japan identified many possible important factors to enhance its brand image, but it appears that they have seldom conducted scientific research to verify their validities on each items. This research shows that some items that Japan already has as inventory items can become powerful tools to attract more numbers of visitors to Japan. Japanese appears to identify some key items as important factors to enhance their brand image, but those identified above are not always included by the imagination of Japanese. Japan has to ask the potential customers directly, instead of imagining what customers want.

The highest ranking mean is recorded by Q20 “Reliable Transportation Network”, and this happens to be the strength of Japan as a tourism destination. Japanese, however, do not seem to fully realize that their efficient, punctual, clean, safe and reliable public transportation system can be a part of attractions

to draw and fascinate foreign visitors, judging from relative lack of such communication efforts to the USA market. The result underscores that there are great potentials for Japan to market its transportation system as a part of packaged tourism attractions.

4 Survey Results – Respondents Profile (no personal information collected)

This is the part in which we asked about the profile of respondents. Details are shown in the exhibits.

5 Survey Results – Open ended replies from respondents

Out of 194 samples, 112 respondents decided to take time to type some comments. Below are all the comments, as exactly as they are, unedited. We will not change anything including obvious typo, so that you can read the fine nuances of the original comments. We encourage readers to embrace both favorable and unfavorable comments as they are, to put the image of Japan in greater perspective. Sequences of comments are sorted in alphabetical order of the first word, which implies at random ordering.

Please see the exhibits for all comments.

II. Survey Analyses – Inferential Statistics

We noticed that some of the Japanese government offices, including Ministry of Foreign Affairs, conducted, intensive data gathering and disseminations such as public opinions survey. Not all those survey results yielded descriptive statistics, which as demonstrated in previous sections, include sample size, mean values, variances and standard deviations. Those data may be able to generate certain levels of additional information which have to be verified by series of inferential statistics, such as correlations, multivariate regressions, logistic regressions, Analysis of Variance (ANOVA) etc. Given the limited time and budget, we will conduct selected topics of possible interest on an exploratory basis.

Methodology

[Survey Creation and Approval Processes for Safety of Data]

For the purpose of this study, we have developed an online questionnaire based on three sources – our previous surveys, some of the published documents about Japan and Japan branding and feedback from Japan International Transport Institute, USA (JITI). Publications that we incorporated their aspects into our survey contents include minutes by the Contents-Japan Brand Special Research Committee at Cabinet Secretariat, web-based information by the Ministry of Foreign Affairs of Japan, and publications by Japan Tourism Agency.

Since any kind of surveys that include human subjects require prior-written approval from the Institutional Review Board (IRB), we sent the final draft questionnaires together with all the required specifications about the survey procedures to the IRB, from which we successfully received “Notice of Exempt Review Status” with reference number SBE-10-06852 on March 30, 2010. Due to full compliance with the IRB requirements, our surveys are strictly structured not to collect any personal information and we have been required to present the “Informed Consent” form at the very beginning of the electronic survey.

Survey results are stored at the encrypted secure server at the main campus of the University of Central Florida, located in Orlando, Florida (Orange County), which is the different location from the office of researchers at Dick Pope Sr. Institute of Tourism Studies. Only one of the researchers has access to the database and researcher has no access to the respondents’ personal information including I.P address, which were not collected from the beginning.

[Data Collections]

Samples are collected at random but via two main sources of channels. The first channel is from the existing listserve of the sponsor, JITI. Since the researcher did not send out any solicitations, but rather asked the sponsor to send the solicitation via listserve, we have no information as to whom the solicitations were sent, adding extra buffer for the researcher to obtain any personal information of the respondents. The second channel is through the listserve of the affiliates of JITI, about which the researchers have no information about the recipients.

While all collected samples are stored in the database, some are unusable due to lack of actual data input. We had to remove two (2) replies because more than 2/3 of the responses were unanswered, as if it was sent as incomplete in the middle of answering the survey. Thus out of total of 194 submissions, 192 were considered as replies with usable data.

[Data Analyses]

We use the statistical software to conduct both descriptive and inferential statistics for the analysis of quantitative data. Descriptive statistics covers the basic characteristics of the data, such as mean, standard deviation, and generation of histograms etc. Inferential statistics techniques are used to verify certain hypotheses or detect certain trends which may not be visible with the results of descriptive statistics. Detailed explanations on the statistical explanations are minimized in the body of the report, which we assume will be read mostly by non-statisticians, or policy-makers, taxpayers, government

officials and those engaged in inbound tourism promotion of Japan in addition to those affiliated with the sponsor.

[Ending Remarks]

While we realize the limitation of this study with a lean budget and limited timeframe, we hope it underscored the importance of collecting primary data directly from the potential customers – future inbound visitors to Japan. We noticed that Japan did not embrace the concept of “destination marketing”, which is based on the quantitative data analysis of potential visitors whom Japan has to study about their perceptions and preferences about travel destinations.

Japan made it clear to the world that Japan would utilize the economic power of tourism as an industry to re-vitalize the sluggish regional economy of Japan. That declaration was confirmed by the inauguration of Japan Tourism Agency in 2008. With the dwindling and aging population, Japan has to generate more inbound visitors to Japan, which indeed will bring the same effect as an exporting industry. Spectacular successes of Japanese manufacturing exports were based on thorough analysis of its customers' tastes and preferences abroad. If Japan wishes to put tourism as a strategic growth engine for the 21st century, Japan has to do the same with the inbound tourists regarding their taste and preferences which varies by region, demographic profiles etc. It is our humble hope that this study shows a flavor of such data-driven quantitative marketing efforts to learn about Japan's potential customers.

Japan is surely perceived to be unique and attractive, but not many actually decide to travel, at least from USA. Negative perceptions about expensive airfares, expensive accommodations appear to be the obstacles which may deter potential travelers to visit Japan. By decomposing the source of attractions of Japan, we can learn that it is not exactly what Japanese guesses but a more subtle intangible item such as “friendly and hospitable hosts” that truly attracts foreign visitors. There are certain items which already exist in Japan but are not realized by Japanese themselves as attractive factors to the inbound tourists, such as “level of safety and security” and “reliable transportation network”. There are certainly the perception and image problems about Japanese tourism resources such as “affordable accommodations”, which are widely available in Japan, with by far more affordable prices than those in Europe or in many of the metropolitan cities in the USA. The survey confirms an urgent task for Japan to communicate more effectively with potential inbound travelers about the reality of those issues, otherwise their negative perceptions will remain outdated and will remain as fears in their minds.

Promotion of inbound tourism brings the same economic effect as an exporting industry due to cash inflow to the nation/region in exchange for providing tourism commodities for tourists' consumption. It was Japan which built a very successful model of export-driven economic growth, and the success of manufacturing sector was attributed to a careful study of tastes and preferences of consumers in different nations and cultures. It would be the same with promotion of inbound tourism in that Japan has to learn carefully tastes and preferences of different segments of visitors from different nations and cultures. Japanese should not assume what foreigners like, but Japanese would be better off by just asking potential inbound visitors' opinions.

Even with limitations that were stated, we hope that data-driven analysis about Japan's image and its travel destination perception demonstrated the benefits of more scientific approach. Research with larger data set, longer time and various locations will bring more insights to the findings in the future, and we are pleased to serve the needs of promoting Japanese image and its status as travel destinations, assisting JITI to raise important issues to various stakeholders in Japan to success in their "tourism nation" initiative.

Acknowledgment

We, the researchers at Dick Pope Sr. Institute of Tourism Studies, located at Rosen College of Hospitality Management, University of Central Florida, acknowledges support from the JITI, to fund this entire survey and subsequent analyses, while their names were not necessarily mentioned nor revealed during the course of data collection for the purposes of maintaining structural neutrality of the survey. We hereby appreciate the support and understanding by expressing full acknowledgment of them. The whole study could not be conducted without supports of many people, including but not limited to, intermediaries who facilitated the spread of the link to online survey, and of course the respondents, whose anonymous responses will be utilized to improve the brand image and product content of Japan as a travel destination by the readers of this study.

We would remain most pleased to undertake future extension of the similar studies, as we are a non-profit research institute specialized in tourism-related quantitative research for Florida, USA, and other nations in the world.

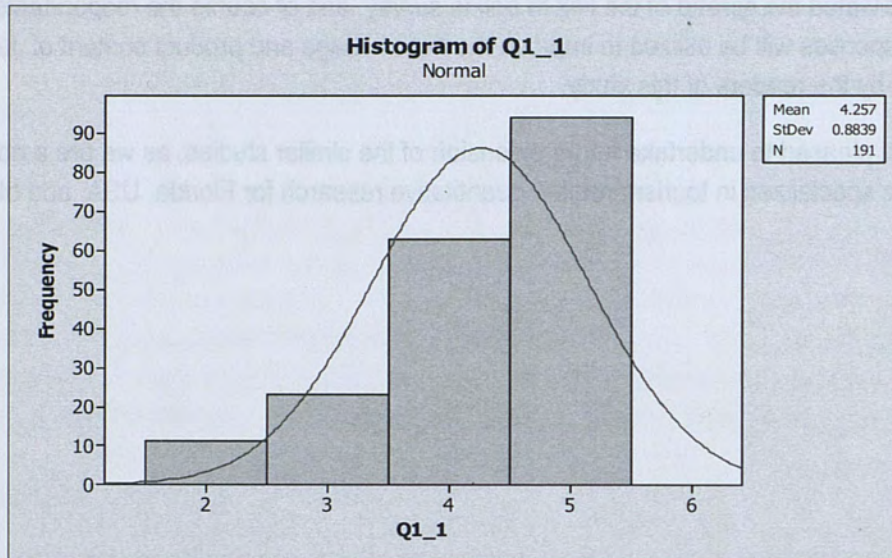
Exhibits

Here are additional details on each analysis.

1 Survey Results – Image

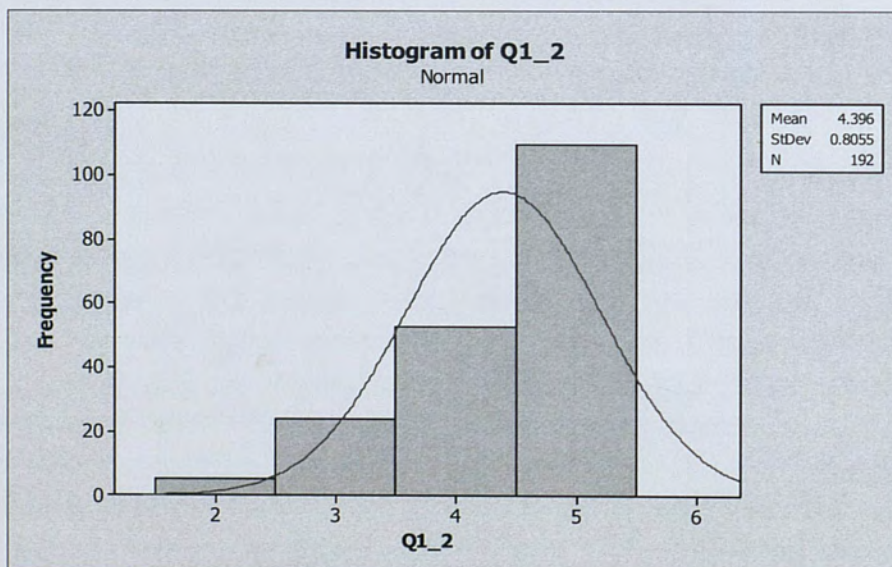
[Strong Perceptions]

[Food]



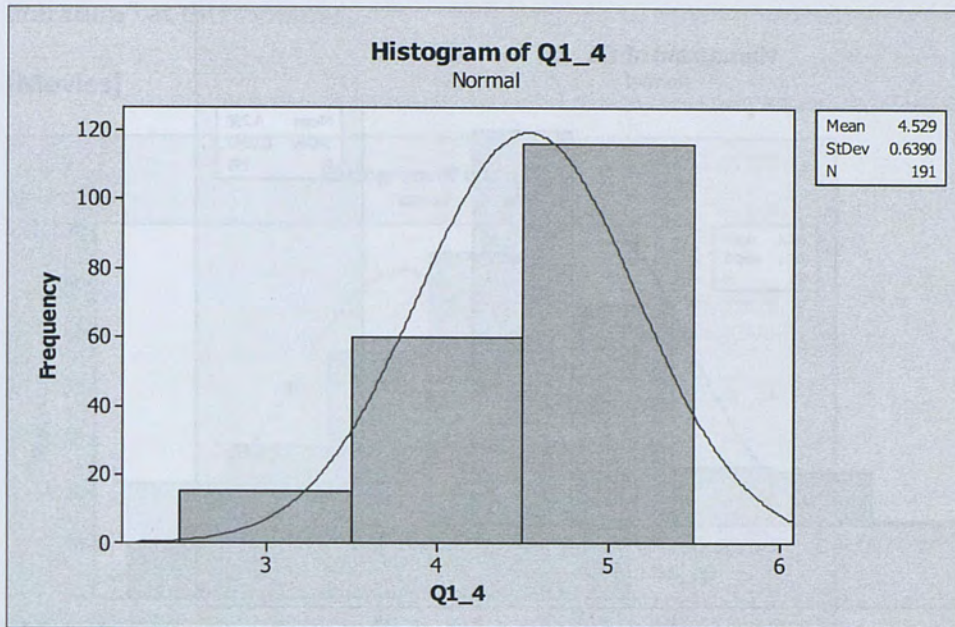
This histogram clearly indicates that “Food” would be a highly effective tool to sell the brand image of Japan, with most respondents choosing 5 and 4.

[Old Culture]



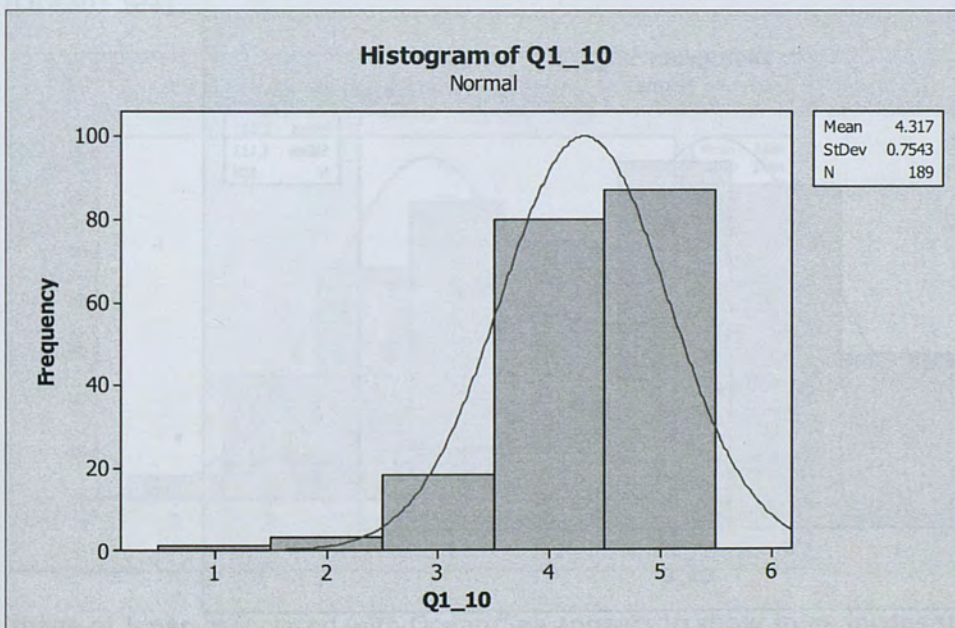
This histogram clearly indicates that “Old Culture” would be a highly effective tool to sell the brand image of Japan, with more than half of respondents choosing 5.

[High Technology]



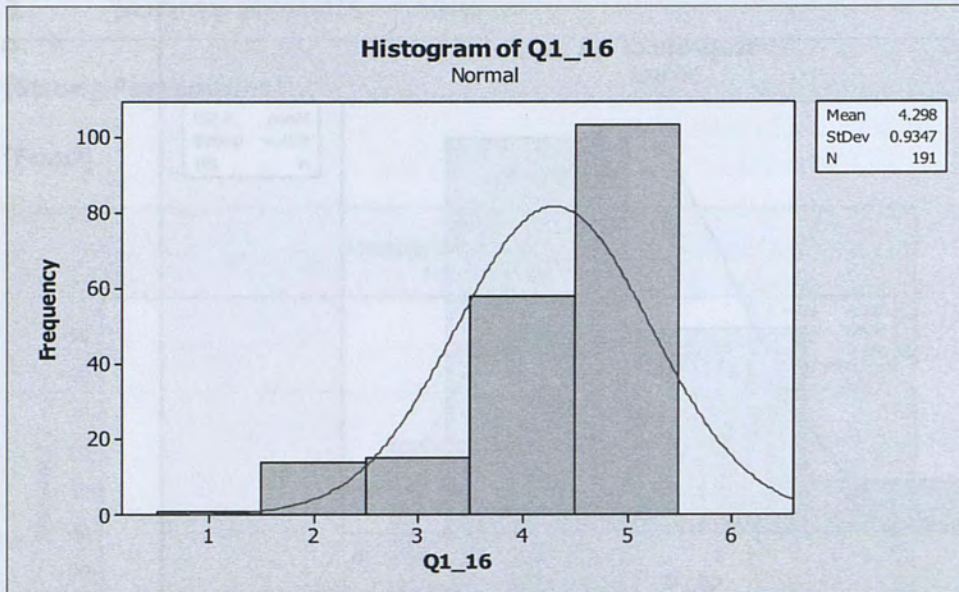
Brand image of Japan associated with “High-technology” is displayed to have the most consistent perception in the minds of respondents. Please note that there were no responses of 1 and 2, emphasizing overwhelming association of Japan with “High-technology”.

[Modern Products]



This histogram clearly indicates that "Modern Products" would also be a highly effective tool to sell the brand image of Japan, with most of respondents choosing 4 and 5.

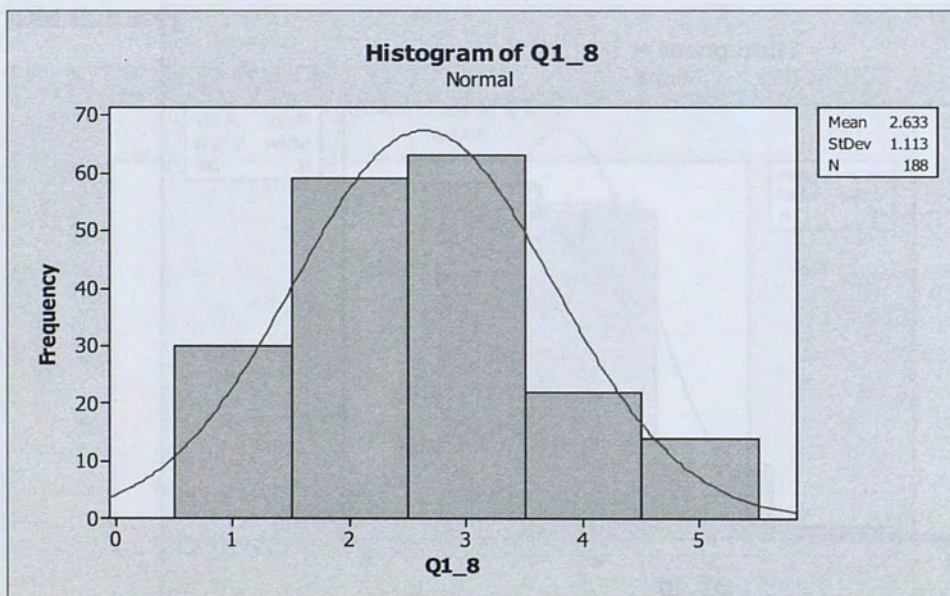
[High Speed Rail / Shinkansen]



Brand image of Japan associated with "High-Speed Rail/Shinkansen" is displayed to have strong perception in the minds of respondents, while there are small numbers of those who did not share such image.

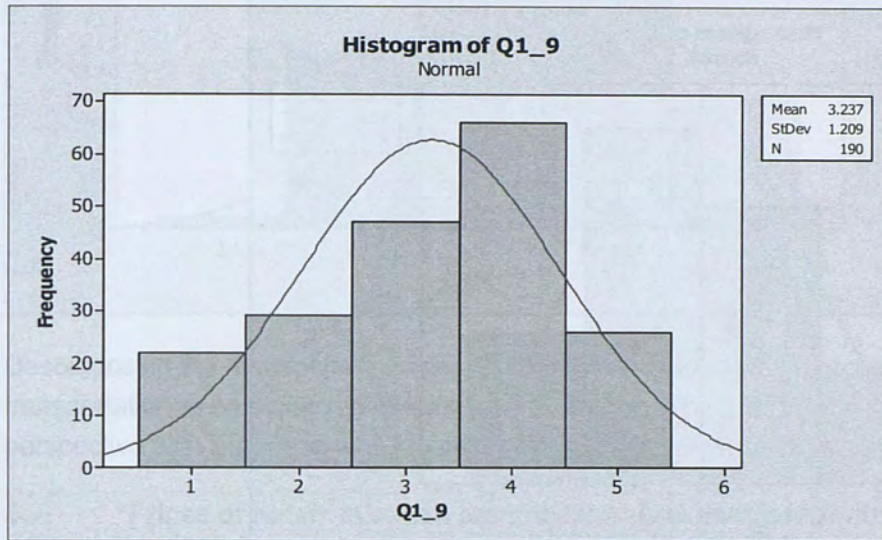
Weak Perceptions

[Modern Literature]



This is how the respondents associated the image of Japan with “modern literature”. While 30 respondents answered “highly unlikely (= 1), about 15 respondents answered “highly likely”. Based on the data, “modern literature” would not appear to be the effective aspects to sell Japan as majority of respondents have weaker image of Japan with “modern literature” at this moment.

[Movies]



As for “Movies” (Q1-9), it appears that there may be more opportunities for Japan to sell the image associated than with “modern literature” (Q1-8). If we look at number of respondents with 5 and 4, they are more substantial than in those in Q1-8. Large Standard Deviation indicates that people’s interests and perception about Japanese movies vary a lot.

[Ocean/ Sea]

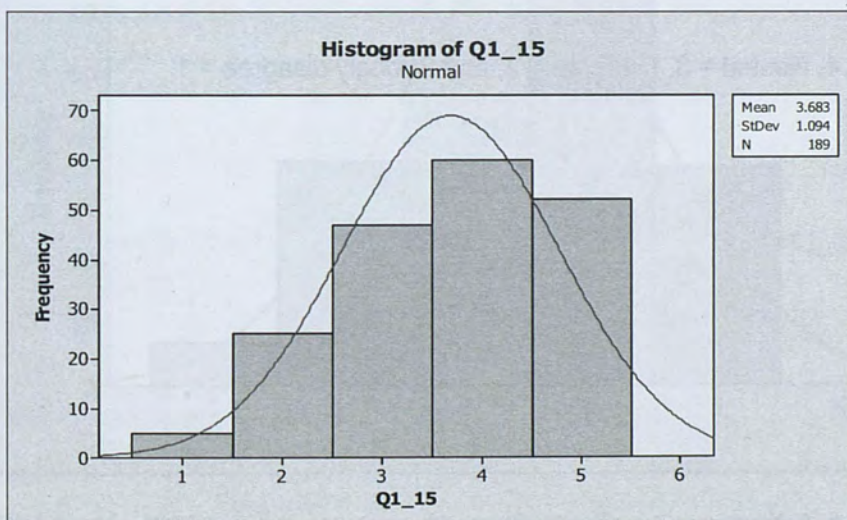
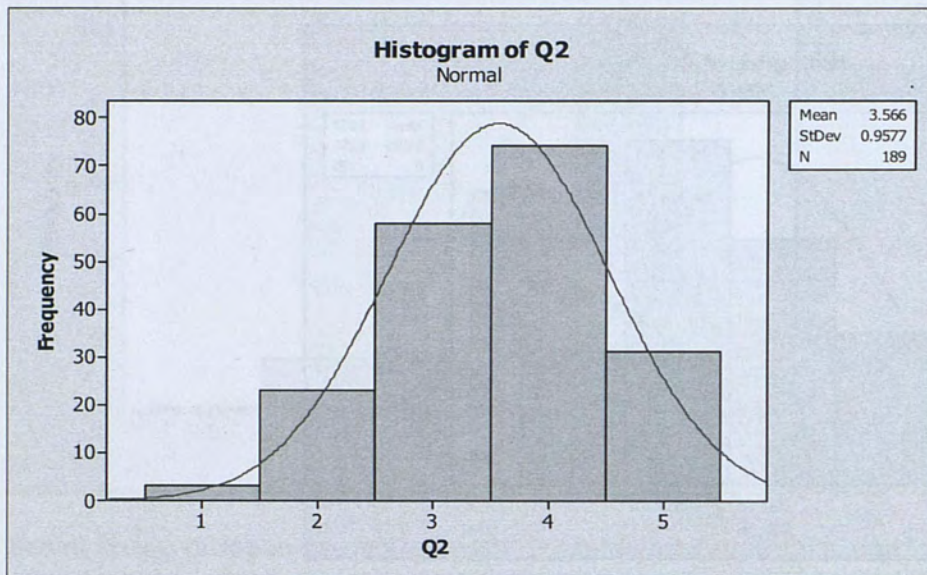


Image of Japan associated with Ocean/Sea appears to show some inconsistency, though about the half of respondents have such image.

2 Survey Results – Perceptions about traveling to Japan

2 “Airfare to Japan is too expensive compared with other destinations”

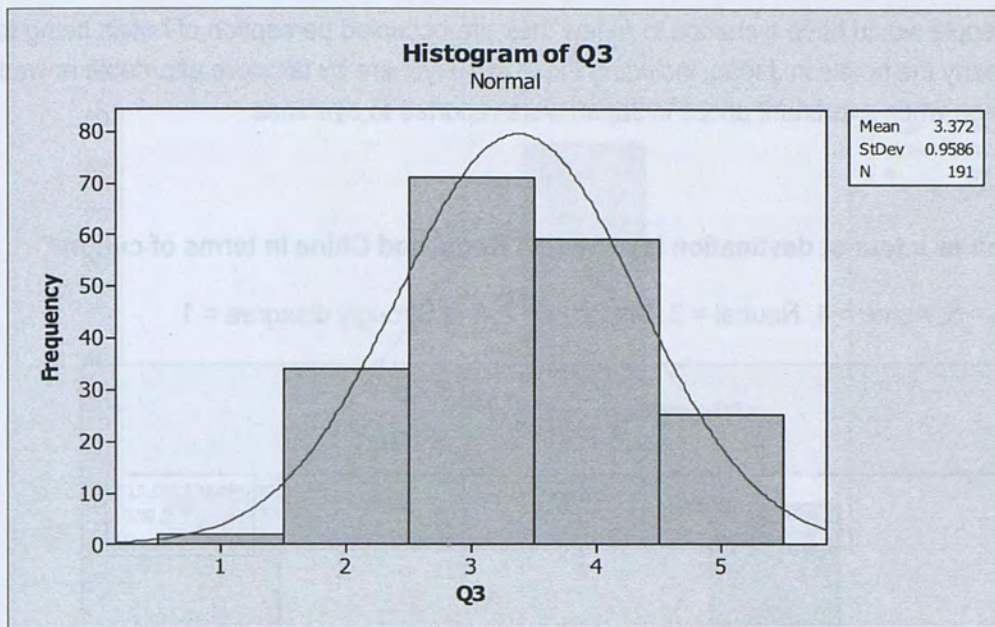
Strongly Agree = 5, Agree = 4, Neutral = 3, Disagree = 2, and Strongly disagree = 1



Unfortunately, it is obvious that Japan suffers from the perception of “airfare to Japan being too expensive”, (Mean = 3.96) and people are rather consistent on the perception (StDev=0.96).

3 “Transportation costs in Japan are too expensive compared with those in other countries”

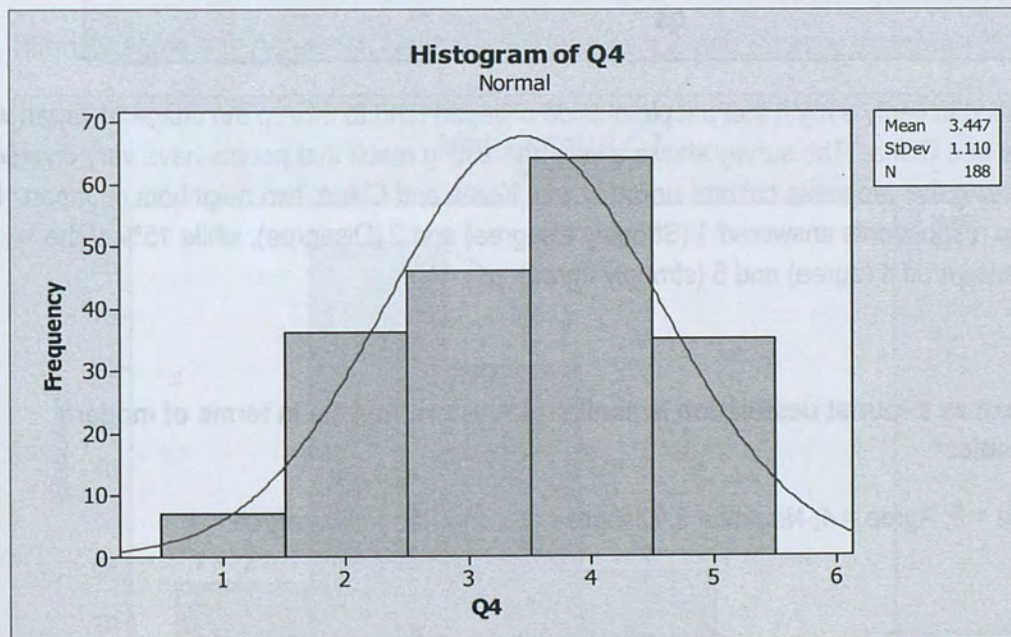
Strongly Agree = 5, Agree = 4, Neutral = 3, Disagree = 2, and Strongly disagree = 1



Decomposing the perception, people do not have as much strong perception of Japanese domestic transportation to be expensive (Mean = 3.37). Yet more people believe it is expensive, while in perspective with European and American cities, public transportation costs are not expensive in reality.

4 “Prices of hotels in Japan are too expensive compared with those in the USA or other countries”

Strongly Agree = 5, Agree = 4, Neutral = 3, Disagree = 2, and Strongly disagree = 1

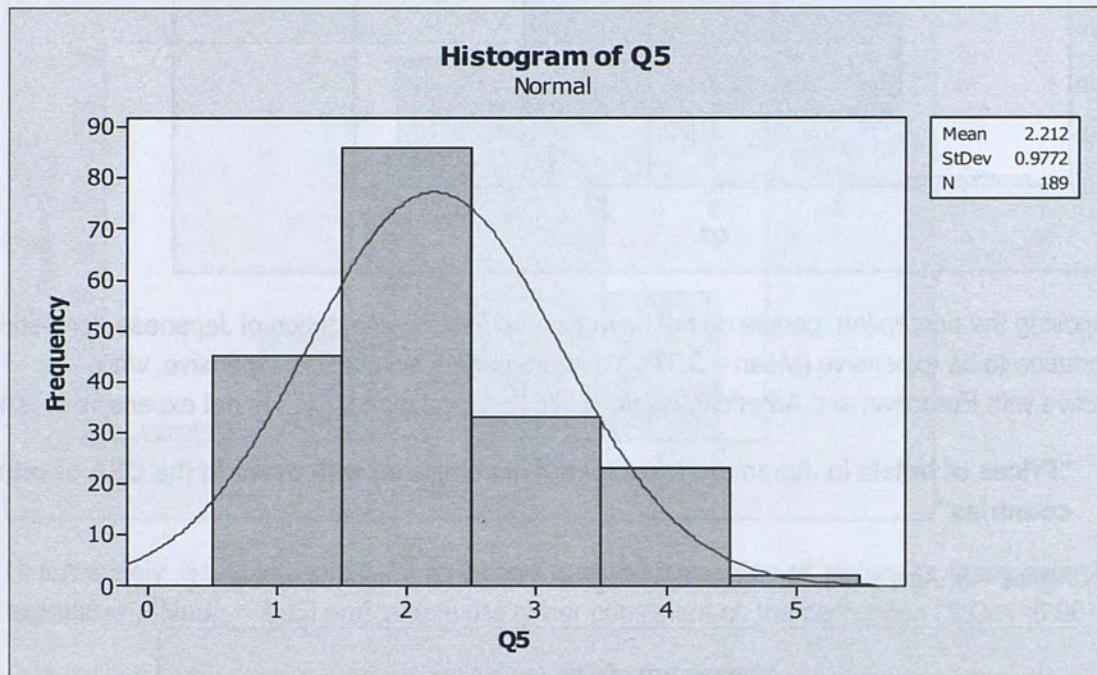


Distribution (SD) is relatively spread but with significant people on 3, 4, and 5 (Mean = 3.44). People clearly demonstrate their perception that hotels in Japan are expensive. It is a good example of how Japan fails to communicate to mass population in the USA with the current facts about the hotel pricing

level, so that people would have a chance to renew their pre-occupied perception of hotels being too expensive. Clearly the hotels in Japan, including those in Tokyo, are by far more affordable nowadays than 20 years ago when exorbitant prices in Japan were reported to overseas.

5 “Japan as a tourist destination is similar to Korea and China in terms of culture”

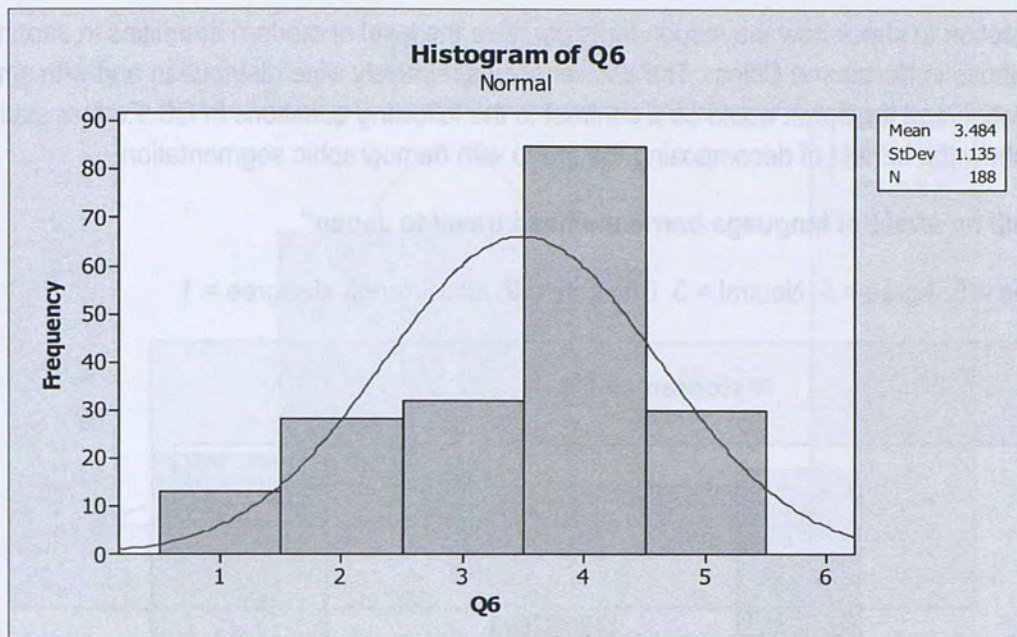
Strongly Agree = 5, Agree = 4, Neutral = 3, Disagree = 2, and Strongly disagree = 1



This is a question to verify a myth that people outside of Japan tend to mix-up the image of Japan with those of Korea and China. The survey shows a very interesting result that people have very diverse opinions regarding the Japanese cultural similarity with Korea and China, two neighbors of Japan. More than half of the respondents answered 1 (Strongly disagree) and 2 (Disagree), while 15% of the respondents answered 4 (agree) and 5 (strongly agree).

6 “Japan as a tourist destination is similar to Western Europe in terms of modern amenities”

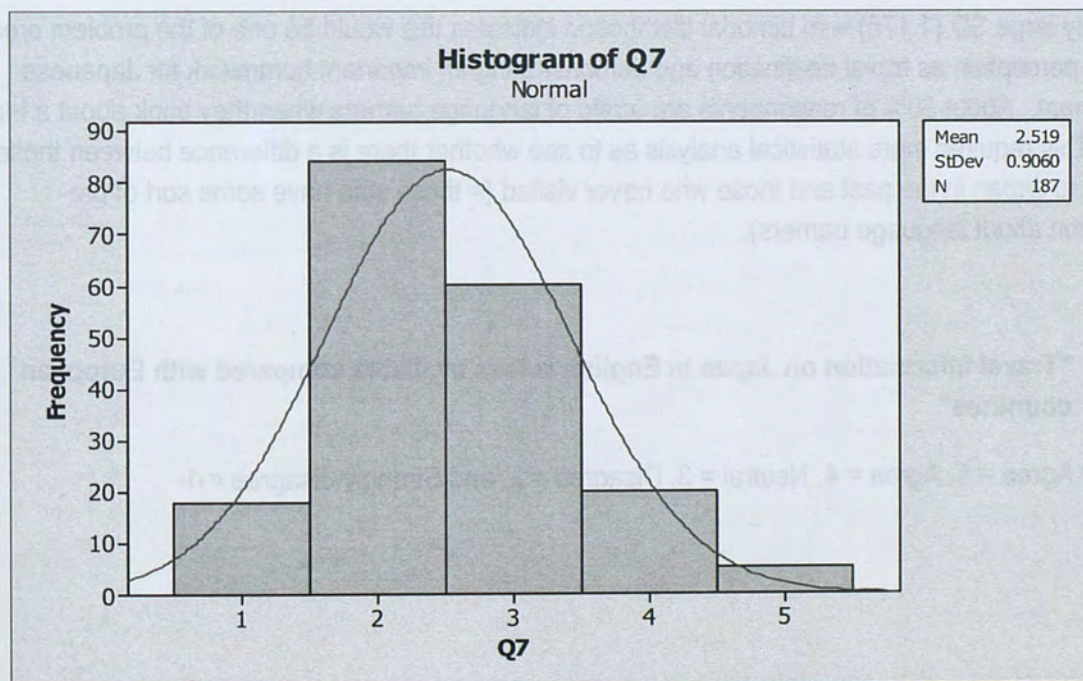
Strongly Agree = 5, Agree = 4, Neutral = 3, Disagree = 2, and Strongly disagree = 1



This is the question to check how the respondents perceive the level of modern amenities in Japan. The answer shows majority either strongly agree or agree to the statement with some SD. People's opinions on this are distributed all across the choices. This question and the result would be a contrast to the following questions in Q7. Further statistical analysis will show the benefit of decomposing the group with demographic segmentation.

7 "Japan as a tourist destination is similar to Korea and China in terms of modern amenities"

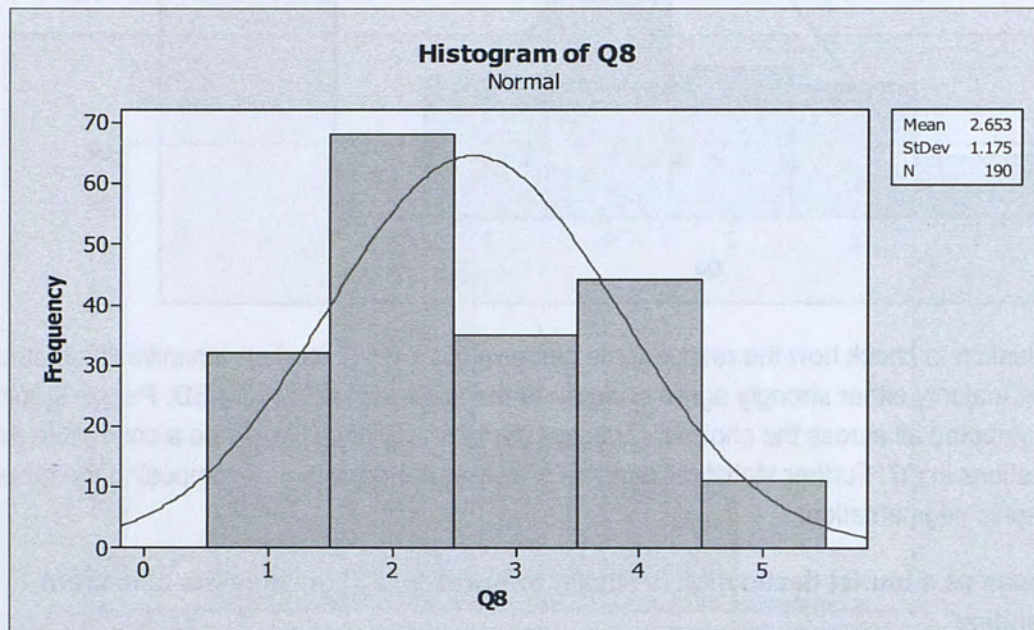
Strongly Agree = 5, Agree = 4, Neutral = 3, Disagree = 2, and Strongly disagree = 1



This is the question to check how the respondents perceive the level of modern amenities in Japan in contrast with those in Korea and China. The answer shows relatively wide distribution and with smaller SD. This question and the result would be a contrast to the following questions in Q6. Further statistical analysis will show the benefit of decomposing the group with demographic segmentation.

8 “I will be afraid of language barriers when I travel to Japan”

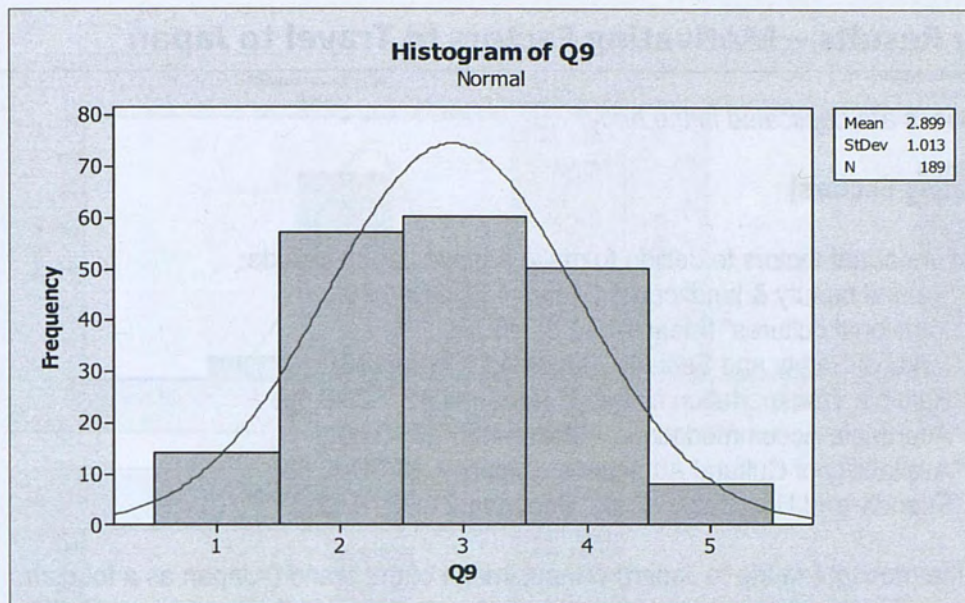
Strongly Agree = 5, Agree = 4, Neutral = 3, Disagree = 2, and Strongly disagree = 1



Relatively large SD (1.175) with bimodal distribution indicates this would be one of the problem areas of Japan's perception as travel destination and demonstrating an important homework for Japanese government. About 30% of respondents are afraid of language barriers when they think about a trip to Japan. This requires more statistical analysis as to see whether there is a difference between those who traveled to Japan in the past and those who never visited (= those who have some sort of pre-conception about language barriers).

9 “Travel information on Japan in English is less available compared with European countries”

Strongly Agree = 5, Agree = 4, Neutral = 3, Disagree = 2, and Strongly disagree = 1



Availability of information in English is not perceived worse than those in European nations. It looks like a perfect normal distribution around the middle point of 3. Note that availability of information in English can be verified by most of respondents with the internet browsing. In relative terms with the result of Q8, it appears that perception of language barriers after arrival at Japan would be a larger source of concern.

3 Survey Results – Motivating Factors to Travel to Japan

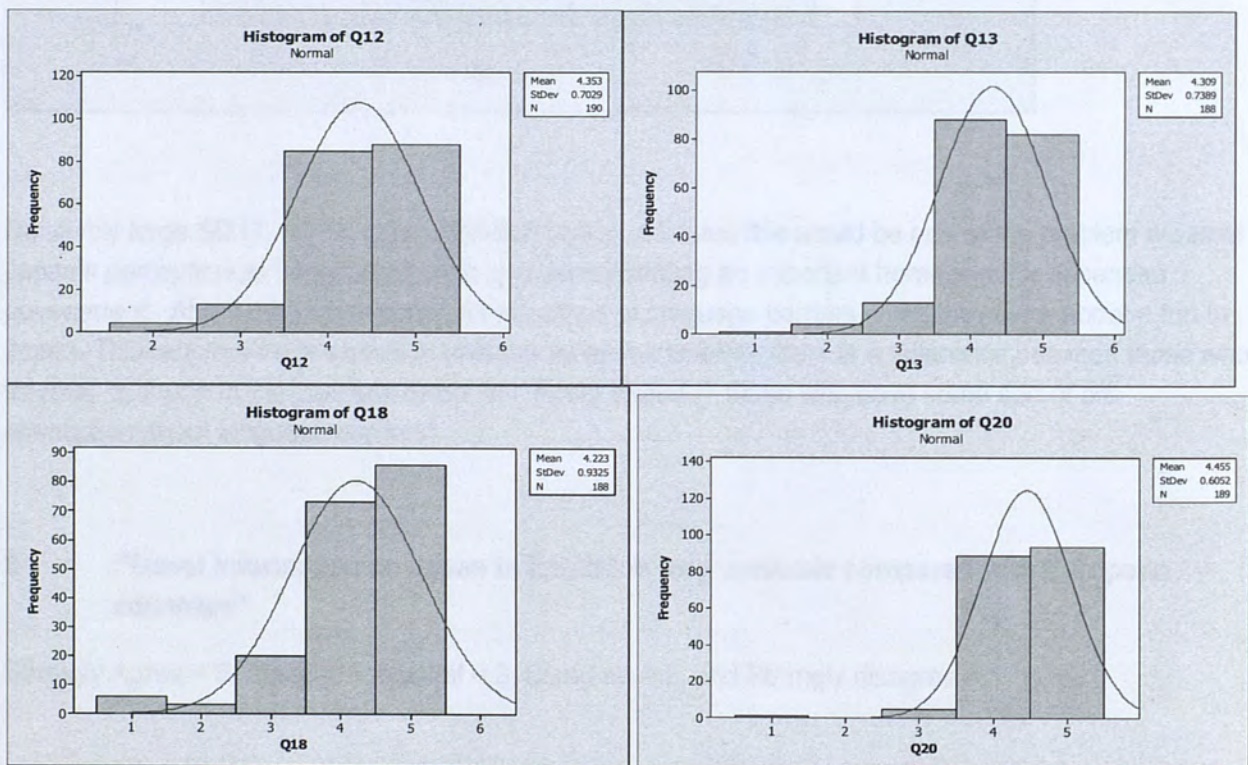
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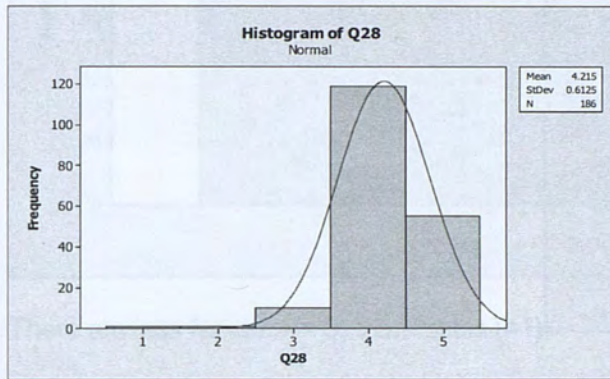
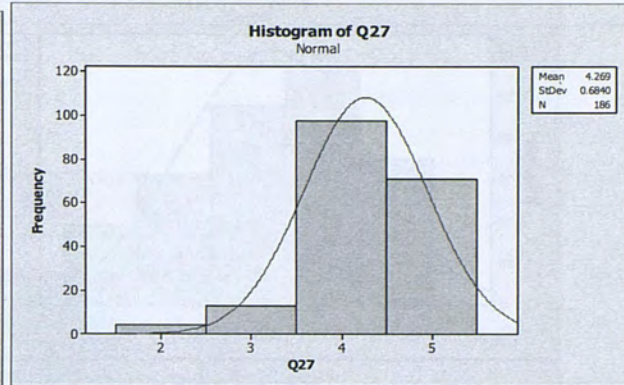
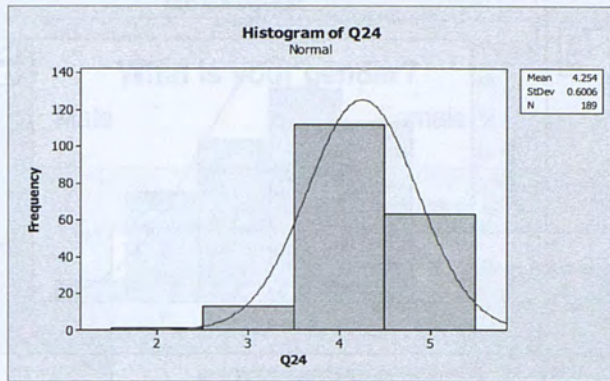
[Important Motivating Factors]

Result showed that important factors to decide to make a trip to Japan include;

- Q12 “Natural beauty & landscape” (Mean=4.35 SD=0.70),
- Q13 “traditional cultures” (Mean=4.30 SD=0.73),
- Q18 “Level of Safety and Security” (Mean 4.22, SD=0.93)
- Q20 “Reliable Transportation Network” (Mean=4.45, SD=0.60)
- Q24 “Affordable Accommodations” (Mean=4.25 SD=0.60),
- Q27 “Availability of Cultural Attractions” (Mean=4.26 SD=0.68),
- Q28 “Friendly and Hospitable Hosts” (Mean=4.21 SD=0.61),

Japan cannot sell the product (=a trip to Japan) without image of the brand (=Japan as a tourism destination). In the past, Japan alleged many possible factors to enhance its brand image, but it appears that they have seldom conducted scientific research to verify their validities on each items. This research shows that some items that Japan already has as inventory items can be a powerful tool to attract more numbers of visitors to Japan. Japanese appears to have claimed some key items as important to enhance their brand image, but those identified above are not always included among the imagination by Japanese. They have to ask the potential customers (visitors) directly, instead of imagining what customers want.





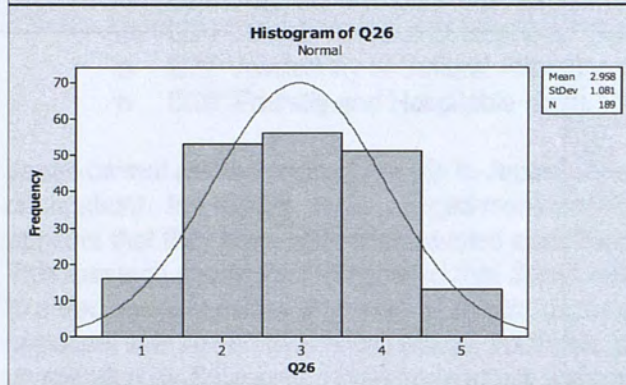
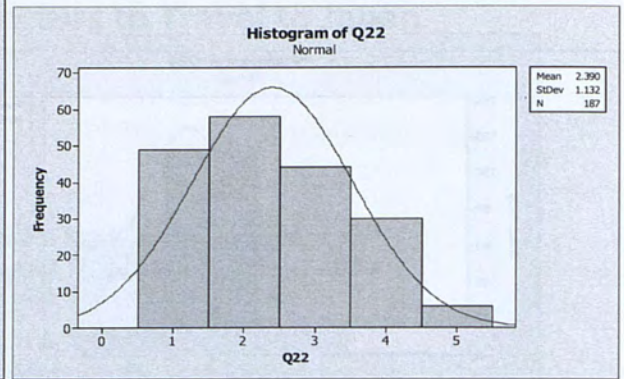
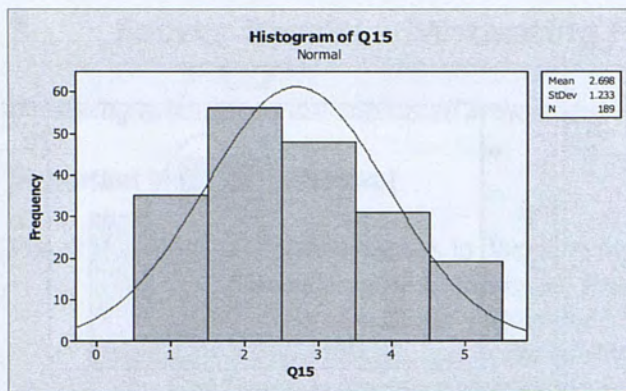
[The Less Important Factors – still useful towards small segments]

Three least important factors while considering a trip to Japan include;

- Q15 “Contemporary fashion trends” (Mean =2.69 SD= 1.23).
- Q22 “Restaurant with Western Foods”, (Mean = 2.39, SD=1.13)
- Q26 “Availability of night life (Mean=2.95, SD =1.08)

This indicates “restaurant with Western Foods”, “contemporary fashion trends”, and “availability of nightlife” are only important to small numbers of potential visitors at best, but not for many others. In other words, Japanese should not expect these items as effective in selling brand image of Japan as it may attract smaller numbers of fans.

Among those items, “contemporary fashion trends” might need special attention due to larger standard deviation caused by wide distribution of answers. Existence of the substantial numbers of those who answered as 5 (highly important) indicates that this theme could be utilized to identify and extract core small segments (hidden among the general crowds), to which concentrated marketing efforts of selling brand image of Japan could be conducted.



The most consistently important factor across samples is “Q20 Reliable Transportation Network” with mean of 4.45 and SD of 0.60, two of the smallest SD among Q10-Q30. While the Japanese may not consider its “reliable transportation network” as a tourism attraction, the survey indicates the great marketing opportunity to attract potential visitors to Japan by communicating the existence of reliable transportation network, which is arguably claimed as the most efficient and punctual in the world.

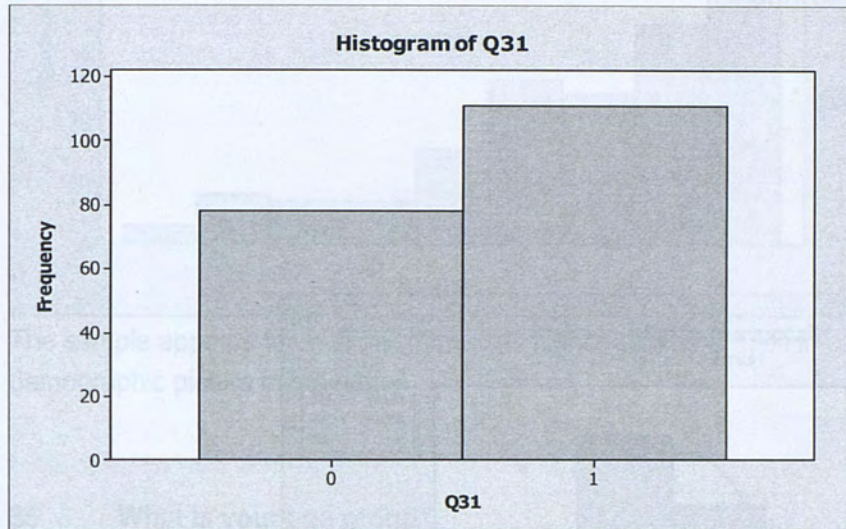
Even so, we do not believe this trait is considered as one of the Japanese tourism assets in their tourism inventory list made by Japanese. This characteristic is something that other nations cannot easily copy and challenge Japan. Because this trait derives from long years of operational history and mentality of precision, Japan has great opportunity to capitalize on this asset to sell it to enhance the brand image of Japan. The quantitative data analysis supports such strategy of Japan, even though it may not be perceived as important by native Japanese.

4 Survey Results – Respondents' Profile

31 What is your gender?

Male

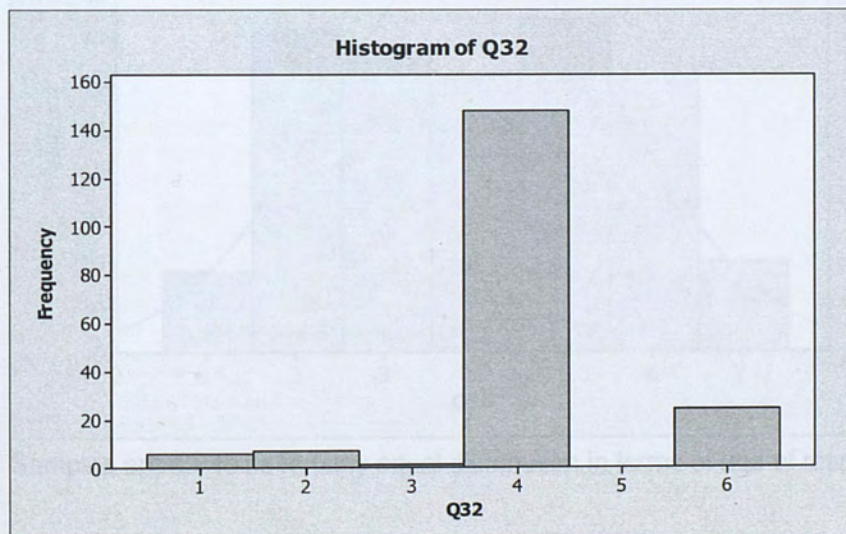
Female



There are less females (= 0) than males (=1).

32 What is your race?

- African American (1)
- Hispanic (2)
- Native American (3)
- White (4)
- Pacific Islander (5)
- Asian (6)
- Other, please specify

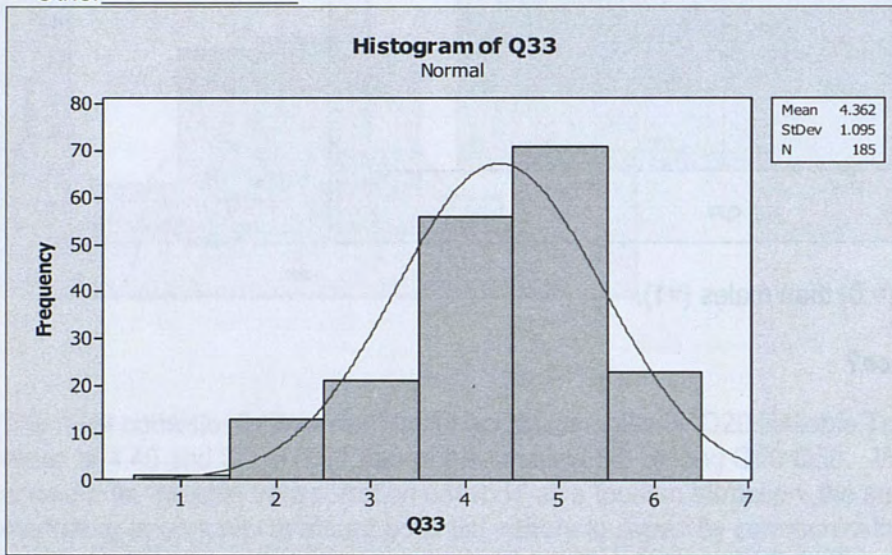


Those who identify themselves as "whites" compose approximately 3/4 of the respondents.

33 What is your highest level of education? If you are student, please choose a degree for which you are working for

Choose only one of the following

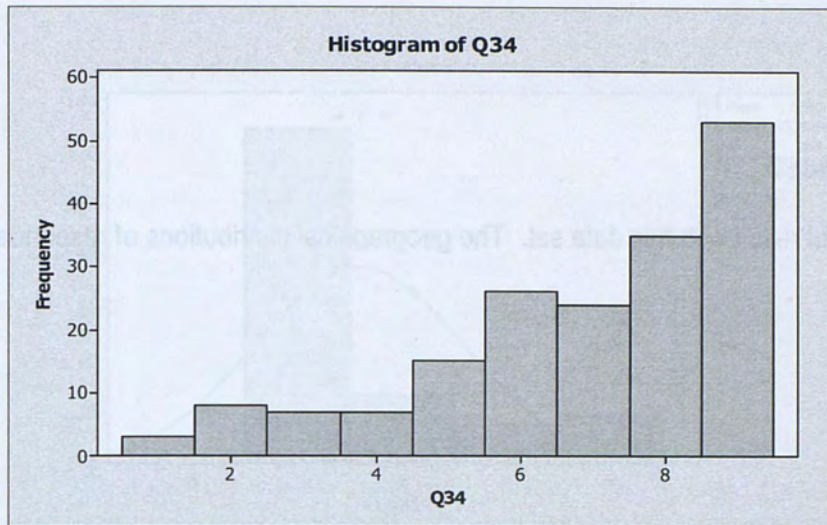
- Primary (=1)
- Secondary/high school (=2)
- Associate (=3)
- Bachelor (=4)
- Master (=5)
- Doctorate (=6)
- Other _____



Majority of respondents are with Bachelor's degrees and higher.

34 What is your annual household income?

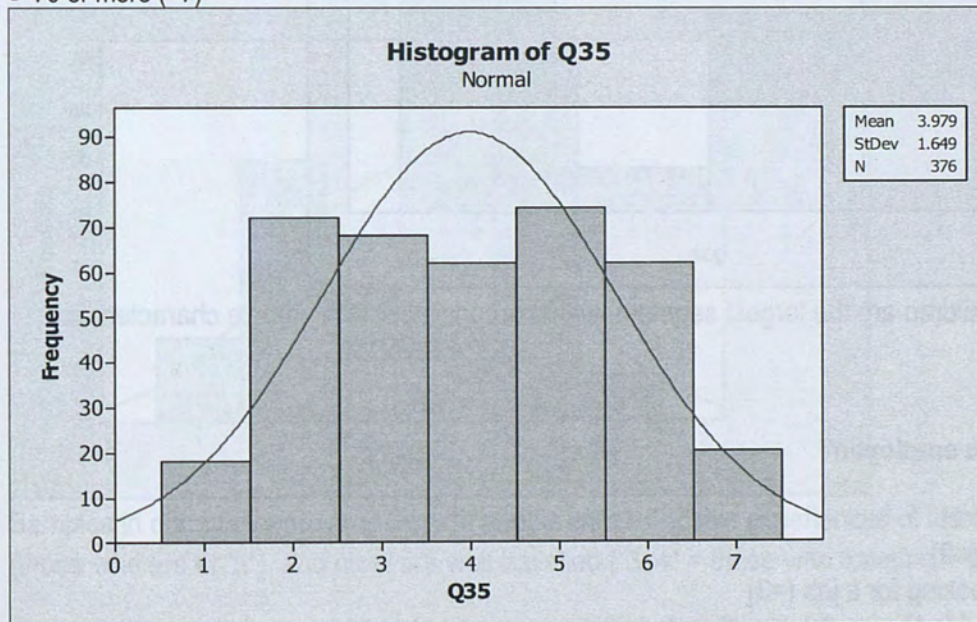
- Under \$10,000 (=1)
- \$10,000-\$14,999 (=2)
- \$15,000-24,999 (=3)
- \$25,000-34,999 (=4)
- \$35,000-49,999 (=5)
- \$50,000-74,999 (=6)
- \$75,000-99,999 (=7)
- \$100,000-149,999 (=8)
- Over \$150,000 (=9)



The sample appears to be skewed towards higher income groups in comparison with a typical demographic picture in the nation.

35 What is your age group?

- 18-20 (=1)
- 21-29 (=2)
- 30-39 (=3)
- 40-49 (=4)
- 50-59 (=5)
- 60-69 (=6)
- 70 or more (=7)



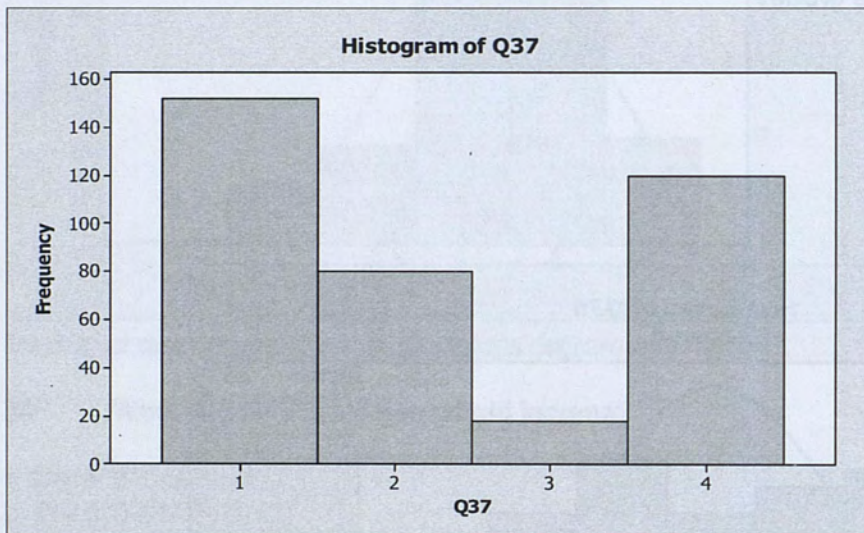
Samples appear to have fairly equal distribution in terms of age of respondents.

36 **What is your zip code?**

We do not find any meaningful result with this data set. The geographical distributions of respondents remain under review.

37 **Are you:**

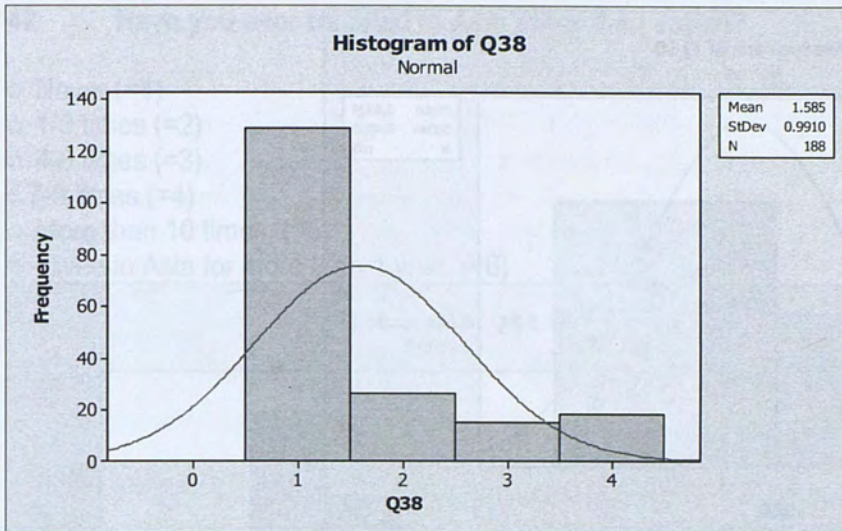
- Single without children (=1)
- Married without children (=2)
- Single with children (=3)
- Married with children (=4)



Single without children are the largest segment, which is consistent with sample characteristics.

38 **Are you employed?**

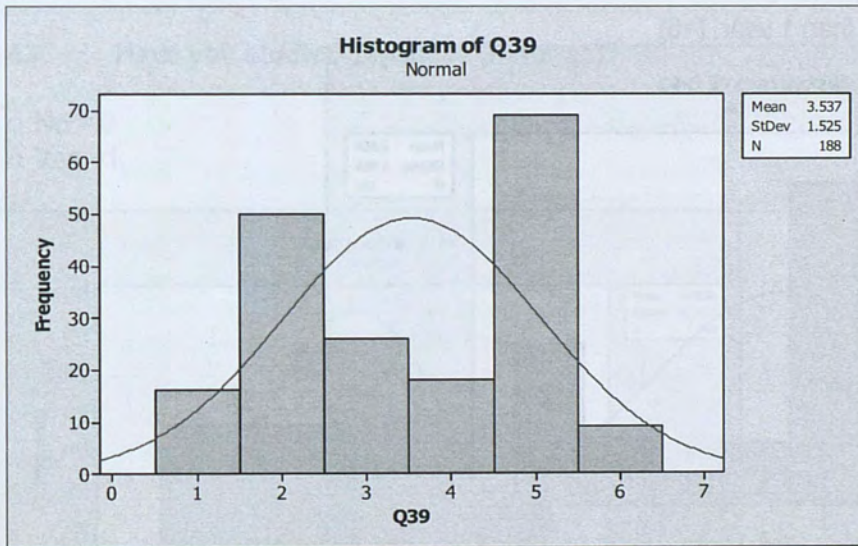
- Yes full-time (=1)
- Yes part-time (=2)
- No, but I am looking for a job (=3)
- No, I am retired (=4)



Majorities are working full-time (=1) or working part-time (=2).

39 How many times in the last 10 years have you traveled outside the USA for business or pleasure?

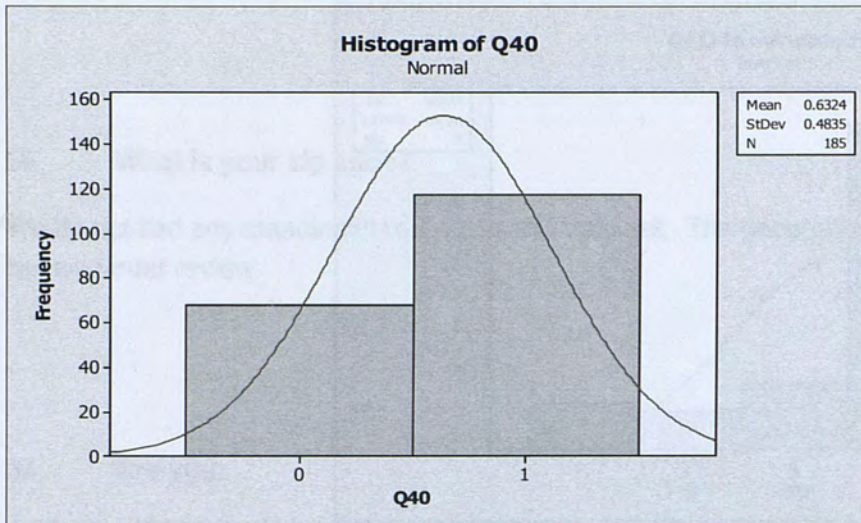
- did not travel (=1)
- 1-3 times (=2)
- 4-6 times (=3)
- 7-9 times (=4)
- More than 10 times, (=5)
- I am a foreign citizen and travel frequently to my country. (=6)



Samples in our study appear to include people with extensive experiences of foreign travel in the past (those who are at "5"), and most are well travelled ("3, 4" = those who traveled 4-6.7-9 times).

40 Do you speak any foreign language other than English?

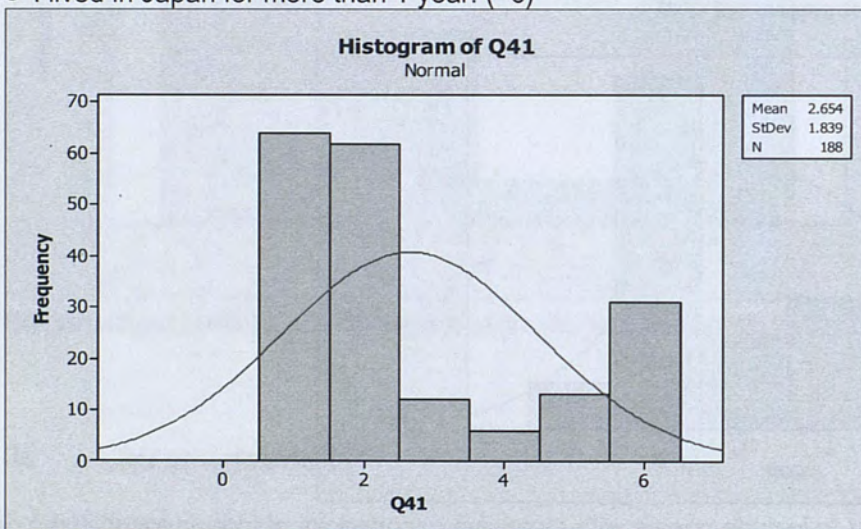
- Yes = 1
- No = 0



Respondents appear to have more international exposures than typical profiles of U.S. citizens as there are more respondents who claim to speak foreign languages other than English.

41 Have you ever traveled to Japan?

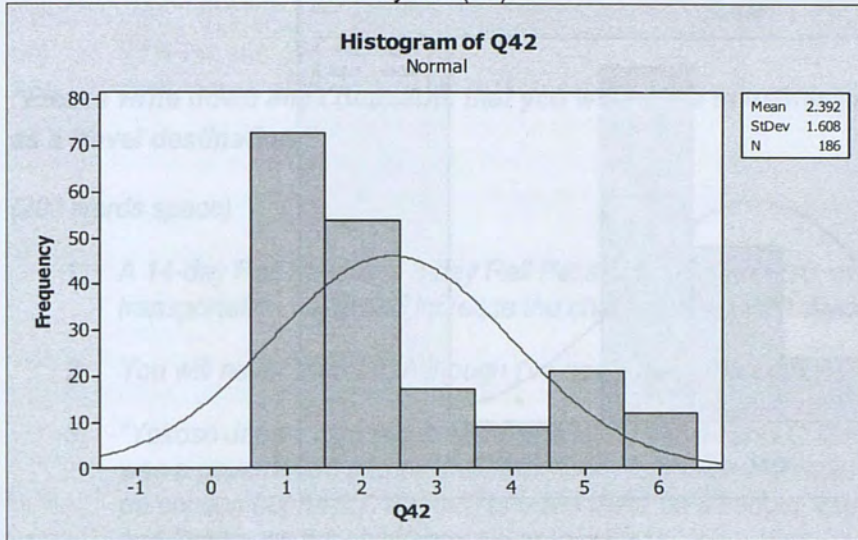
- Never (=1)
- 1-3 times (=2)
- 4-6 times (=3)
- 7-9 times (=4)
- More than 10 times, (=5)
- I lived in Japan for more than 1 year. (=6)



One-third of respondents have never traveled to Japan (see the size of "1"). In order for Japan to increase the inbound visitors to the goal of 20 million in 2020, Japan has to consider seriously tapping the large segment of those who have never visited Japan, while retaining smaller number of those who came to Japan as repeaters. We assume many of those who claimed to have lived in Japan more than one year ("6") were affiliated with ex or current military service personnel, or businesspersons who were assigned to work in Japan.

42 Have you ever traveled to Asia other than Japan?

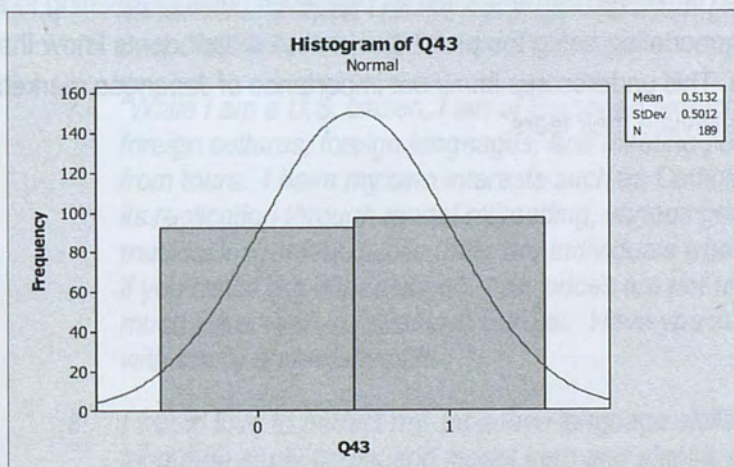
- Never (=1)
- 1-3 times (=2)
- 4-6 times (=3)
- 7-9 times (=4)
- More than 10 times, (=5)
- I lived in Asia for more than 1 year. (=6)



Majority have never traveled to Asia either (=1). This may indicate an opportunity for Japan to have joint-market collaboration with East Asian neighbors of Korea and China to attract inbound visitors to the Greater East Asian region.

43 Have you studied Japanese (Nihongo)?

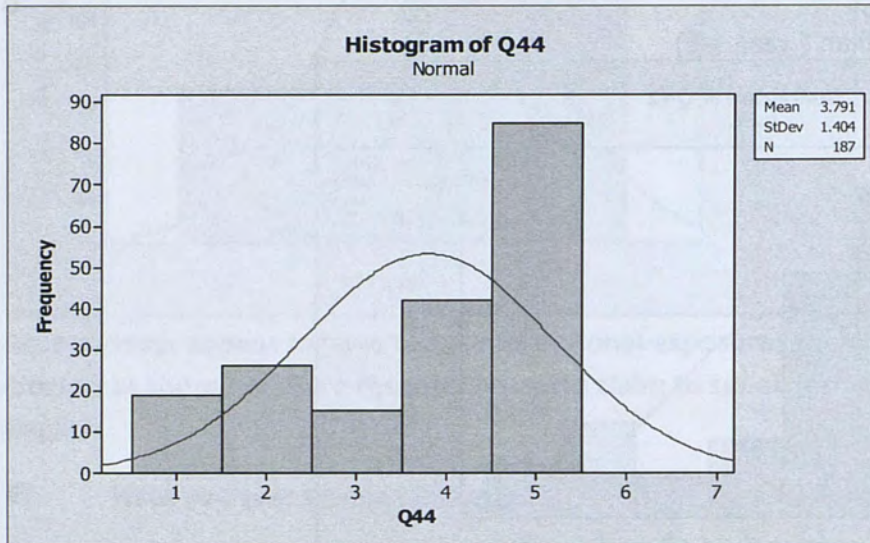
- No = 0
- Yes = 1



Slightly more than half have studied Japanese language (=1), which indicates that the samples are not typical US residents.

44. Given you have sufficient funds and time to travel overseas, what is the likelihood that you will travel to Japan in the next 12 months?

- Highly Unlikely (=1)
- Unlikely (=2)
- Neutral (=3)
- Likely (=4)
- Highly likely (=5)



Relieved from perceived constraints on financing and time, approximately 60% of the respondents have replied “Highly likely (5)” and “Likely (4)”, which is in line with the previous research results with the student body at University of Central Florida. Japan became the No.1 place of destination to go “study abroad” program, twice in unsolicited surveys at one of the state universities in Florida. Japan has substantial potential to capitalize on the people’s desire to visit by carefully removing each anxiety in the mind of potential visitors. Only through scientific, data-driven quantitative analyses, you have enough evidences to back up certain strategies with higher likelihood of success.

While we have identified some of those perceived barriers, such as perceived costs of traveling to and in Japan being too high, or cost of accommodation being too prohibitive, not all respondents know that are not in line with reality in current Japan. This underscores imminent importance of Japanese marketing to address potential visitors’ concern to alleviate their fears.

5 Survey Results – Open Ended Replies

Almost half of the respondents took time to type up their comments and suggestions, which is very unusual in this type of surveys. All the comments are shown below, and these are not extracted samples but all of them as they were typed. Extremely useful comments and insights can be found here.

“Please write down any comments that you would like to express regarding Japan and/or Japan as a travel destination.”

(200 words space)

- 1. A 14-day Rail Pass or a 3-day Rail Pass for foreign tourists would help to allay fears of transportation costs and increase the chances of visits in Japan beyond Tokyo.*
- 2. You will never regret it. Although I've never been there before.*
- 3. "Yokoso Japan' logo is a familiar sight, but I didn't know until recently what it meant or that it was a government tourism initiative. I have found the high cost of visiting Japan as not just perception but reality. It's hard to travel there on a budget, especially if you want to visit Tokyo and Osaka, as the shinkansen is expensive."*
- 4. Yokoso campaign has helped identify Japan which had for a long time not advertised itself much at all. Japan is hip and modern and cultural and traditional, very different from neighboring Asian countries in that sense. Continue to have campaigns and express an image. Look at the baby boomer market, student travel market, multi-generational market.*
- 5. Wonderful country. Most interested in easy day trips outside Tokyo.*
- 6. While there is a lot of tour information for many of the more major sites, there isn't a lot for other areas. When I travel I intend not to go with a tour group so I can see more of the country on my own. Hokkaido is of major interest to me, as are anything 'off the beaten path.'*
- 7. "While I am a U.S. citizen, I am of European extraction. The point is, I am a globalist. I love foreign cultures, foreign languages, and meeting people. When I travel, I go independently from tours. I have my own interests such as Catholic faith, high-speed rail transportation and its replication through model railroading, various genre of music interpreted by my playing of a musical instrument. While there are individuals who complain about prices in Japan, the truth is, if you travel like Japanese citizens, prices are not unreasonable. In fact, prices in Japan are much lower than in (Western) Europe. Have you seen Italian prices?????? Even if you stay with family and relatives!!!!*
- 8. I would love to perfect my Japanese language skills (speak, read, write). I do have Japanese language study books and model train and electric guitar magazines.*
- 9. I love Japanese culture. I wish I could absorb their tranquility. "*
- 10. "When I travel, I like to have a good map so I can walk around a city and not get lost. I would want to acquire maps before I left on my trip. I would also hope that there would be a good*

level of pedestrian and traffic safety where I went walking.

I prefer not to rent cars, so I would also want good information on transit and trains.

11. *I have not done any research on travel to Japan yet, so I do not know what I would find on the Internet in English. (Most European travel websites I have visited are multilingual, including English.)*
12. *I Went once and thoroughly enjoyed my time. Taking my son next month as his high school graduation gift. People were very friendly and helpful when I was there in 2006. Transportation system logical, however only difficulty expected is finding the right train platforms and series of trains to our destinations. I've been learning some Japanese, but expect people will work with me to understand my needs, whether we speak the same language or not. That was my experience on my last trip. Expense of travel is high for us, but that's fine. We really want to go. I also plan to take my husband in a few years.*
13. *We would eventually like to go to Japan, but there are many destinations on our travel list that rank more highly for us.*
14. *We travel there almost every 2 years to study Bonsai, last time we took a Latin group to 3 different cities and where an amazing experience.. Everybody loved Japan and wants to return soon...*
15. *We recently traveled around the greater Tokyo area and had a wonderful time. People are very friendly and everything is clean. We felt comfortable taking the trains around ourselves. We didn't worry about crime or food/water quality. Prices seemed to be about the same as US depending on where you were. We stayed at the Yokota Airbase which was nice and close to the Fussa train station. We were lucky to have a Japanese person with us much of the time to assist with translation. I would love to go back and visit other areas of Japan further south.*
16. *"We have made friends with a lovely Japanese family via the internet. We have been friends for over 2 years and communicate via email and Skype web cam. They live in Matsuyama, Ehime. Our fondest wish is to be able to meet them in person. However, for a family of 4, airfare is not feasible at this time. This family is very generous with their gifts to us and we have learned much about the Japanese culture. We are anxious to experience it in person. The hot spas and temples look so inviting. If the rest of Japan is anything like this family, we are going to love it!"*
17. *We have been to Japan twice and enjoyed both visits to my son and his wife. Japan is very safe, the people are friendly. We visited mainly temples, did some shopping, not so much 'night life'. We visited Tokyo, Kyoto and Nara. The only problem we occurred was in finding Over-the-counter type medicines. The subway /rail system is fantastic, the bullet train is a bit overpriced, however. Would like to see more dressers in the mid-range hotels. We would go back every year if it was a bit more affordable in airfare and hotels.*
18. *Travel industry is asleep. It's too expensive.*
19. *Tokyo is very nice to visit and Japan is very easy to like.*
20. *Tokyo is very easy even with little English. I had a cold and the Japanese people were very friendly in helping me out with finding proper medicine and good food. Getting around by the Yamanote train made it very accessible and fun. I plan on taking friends next time I go and share my great experience.*

21. *The first time I went to Japan, most people asked me why... as if it would be the last place they would choose to visit. Unfortunately, I think most people have either negative, or condescending attitudes towards Japan; whether it be their lack of understanding when it comes to the language and customs, or that they simply think Japanese are 'weird'. A reoccurring stereotypical image of Japan and Japanese culture usually includes anime, animated pornography, ridiculous television shows and music, samurai, geisha and widespread mis-pronunciation of the English language. Despite the Japanese products that Americans have been using and depending on for decades (automobiles for instance), and our love of sushi, Japan seems too far away and not worth the trouble. I also think that most Americans' idea of traveling internationally means going to Europe or somewhere tropical; Japan and Asia are not even in the same paragraph.*
22. *Subway systems completely defeats me even after several trips; need some kind of system to punch in starting point and the end destination and get a print out directions - in English.*
23. *"Section 2, question #5: 'Japan as a tourist destination is similar to Korea and China in terms of culture.' I answered disagree because I think Japan as superior to Korea and China in terms of culture.*
24. *I am visiting Japan in August with my wife (who is studying Japanese now so we have basic language skills when we visit - something we do for every foreign country we visit). Also joining us are two 20-year olds who are very interested in Japanese culture, manga, etc. We are visiting Japan because our friends from Hawaii are in the Navy and are now stationed in Yokusuka. If we did not stay with them we probably would not visit Japan due to perceived relatively high cost of travel and lodging. Domo arigato goziamas."*
25. *Regarding leisure travel, for many Americans it is a destination that is too expensive. To a certain extent it competes with other Asian destinations that are far more affordable.*
26. *"Overall, I love Japan. I hate Tokyo. The worst part (and really disgusting) of being in Tokyo is riding the trains at night. I cannot stand being around people who are stinking drunk. More disturbing is the drunks vomiting everywhere in the station. I cannot understand how a civilized society can allow it! It's wrong. I love the Japanese people but this is one thing I cannot accept and cannot condone.
Also, the rush hour trains are horrible! I don't know how people do it every day!! It was the worst experience in my life!"*
27. *"One of the biggest bottlenecks is the access from the airport to the final destination.*
28. *Easiness and convenience of access, for example from Narita to downtown Tokyo, and availability of transfer flight and of fast train to destination should be pursued as well.
Need to consider in foreign visers' shoes. They are weary after long flight. If they knew that the access is simple and quick, their original curiosity would not be diminished by long flight schedule, but if they hear or experienced once about the long hour access, they might become discouraged to make a trip or repeat it. "*
29. *"Of all Asian countries, I consider Japan the most intriguing by history, culture, art, design and the concept of beauty in daily life.*
30. *In the field of science and technology it is very exciting and inspiring.
However, the language problem is a barrier because the visitor cannot 'guess' meanings of signs, etc. So it would be very important in my view that the visitor learns rudimentary*

expressions for easy navigation.

"

31. *Need more affordable packages and highlights of 'sustainable living in homes, geographic areas, commercial sectors, protection of natural resources, fishing*
32. *My only trip to Japan was about 15 years ago. At that time, it was not possible to buy a Shinkansen ticket by credit card. That caused me a great deal of trouble. Otherwise, I had no difficulty traveling around Tokyo and Osaka. I found owners of small restaurants to be very helpful in helping me order food.*
33. *My mom was born on the Japanese territory, so I would love to be able to visit at least once in my life.*
34. *My main reason for traveling to Japan in the near future is to experience the live concerts of my favorite Japanese music artists. These artists are 'Perfume' (my top favorite), 'capsule', 'MEG', and 'Aira Mitsuki' (as well as others if possible). Additionally, I love Japanese culture as a whole. My best friend and I love eating sushi in America (Unagi is our favorite) and we think it will be even more delicious and fresh in its own country. I am so excited to visit sometime in 2011!*
35. *"Marketing/advertising campaigns related to Japan have not been as effective as efforts seen by other, more popular, destinations internationally and in Asia. Many travellers, even those with transfers in Narita, choose to bypass Japan when travelling throughout Asia. Business travellers tend to stick to major Japanese cities and opportunities to expose travellers to Japan's countryside and natural beauties are limited compared to other travel destinations. 'Yokoso Japan' is unknown outside a very limited community and does not grab the attention of individuals who do not speak Japanese.*
36. *Japan seems easier to get around than Korea or China. Taiwan is a lot more difficult for a English speaker to get around than Japan.*
37. *Japan rocks; it's a world unto itself.*
38. *"Japan is the best country I've ever seen in my whole life and I'm thinking about moving to japan*
39. *Japan is in the vanguard of creativity in art, fashion, electronics, design and in the culinary arts. Yet, it has simultaneously preserved its old customs through a mix of modest privacy, a fantastic and beautiful display of all they have achieved through the centuries, and, in the extreme, an insularity that is achieved by a declared aversion to anything foreign. However, my experiences in Japan have been wonderful, from the attentiveness, conscientiousness, and politeness with which I have been treated, to the many wonderful sites that I was priveleged to visit, and to everyone I met during my travels in Japan. I would gladly visit there again and again.*
40. *"Japan is an amazing country. Of particular personal appeal is the perfect blend of traditional cultural heritage blended with a unique modern culture and high technology.*
41. *Although expensive, with proper planning Japan can be quite affordable. For example, the strong benefits of the JR Rail Pass... or eating in a local restaurant as opposed to a 5-star restaurant in a western style hotel... or perhaps, staying at a Japanese business hotel vs. a Western Hotel."*

42. *Japan is a wonderful travel destination. I've only been one time, but will go again this fall. I was treated exceptionally well where ever I went in Japan (Tokyo, Kamakura, Nikko). Transportation is excellent, and everyone I met was very helpful. Food is excellent. Cultural attractions (temples, shrines, etc.) were great. Local people were very gracious, and business people and store clerks were very nice & helpful. I've been to many different countries in the world, and Japan surpasses them all, and is head and shoulders above all others.*
43. *Japan is a great place to go as a travel destination as long as you keep in mind the cost to travel there and make the most of unique and local goods and services and get off the beaten path of tourists and see some of the real country.*
44. *"Japan is a great destination: only the 14 hour plane ride is a hassle. I would like to comment on the quality of JITI forums. Care needs to be taken to make events brief and saturated with information. I have never heard anyone remark positively on the events, usually because it was long, boring, and provided little new information. With only a little bit of strategic planning, JITI events, such as the ones on tourism or high speed rail, could go a lot further to promote Japan as a destination and Japanese businesses as potential partners. "*
45. *"Japan has been my beloved country since i was a little girl.and it's been my dream going someday. I love it for its people,its culture,its music,its technology and many many things. I LOVE JAPAN!!!!!!!!!!*
"
46. *Japan has a rather efficient reputation as well as one alooffness*
47. *Japan conveys an expensive travel destination.*
48. *Japan and things Japanese remain exotic for many Americans. That Japan can be exotic and, at the same time, not threatening to Americans is the key to any advertising campaign. I travel to France quite often and I am surprised how inexpensive Japan can be compared to France. Japan still appeals to Amercian travelers as a place you should visit for 1-2 weeks - this is too long ad might be expensive. Asia is an diverse region whose internal airfare costs make visits beyonf one country difficult for the average American traveler (unlike Europe for example). An ad effort with Japan and South Korea as a package might be productive.*
49. *I've personally enjoyed my time in Japan when I traveled there. However, if there was more access to English, I think more Americans would go.*
50. *"I've never had the resources to travel over seas. However, I'm interested in history and cultures different from my own. Japan seems interesting because it appears (to my untrained Western eyes) to exist in two worlds: One of the oldest surviving cultures with a strong sense of self and yet a place of advanced ideas regarding technology and its practical application to improve the quality of life. If I had the resources, I would certainly like to one day travel to Japan. My skill with languages is lacking, however. So folks would have to be patient with the poor, hapless American. :)"*
51. *It's an amazing destination with a broad range of things to experience. Everywhere the food is unique, the people friendly and the culture omnipresent. It is my favorite destination.*
52. *In the early 1960s I corresponded with several Japanese pen pals*

53. *I'm thrilled to be traveling to Japan this summer with my three teenage boys and their friend, who has never been out of the USA but loves Japanese culture. My husband is coming too. We plan to visit Tokyo - Hiroshima - Miyojima Island - Kyoto. My kids LOVE Manga, anime, Japanese architecture, swords, and all things high tech. I'm looking forward to the temples, onsen, and museums. we're leaving on JAL June 17th from SFO. If you have any suggestions for us, please contact me: [REDACTED]. Thank you! (covered by the researcher not to disclose personal information – even though it was put voluntarily by the respondent)*
54. *I'll be going to Japan because my daughter will be there to show me around, but the expense of travel to Japan would normally decide me against it.*
55. *If I ever go to Japan, I would probably want to visit Tokyo and Kyoto, go hiking in parks, try Japanese restaurants and visit somekind of seafood market.*
56. *If and when I'd ever have enough money to go to Japan, I would go in a heartbeat. It has been my number one destination that I've dreamed of. I love Japans culture and history. I also have a Japanese pen pal that I would like to meet one day. Hopefully in the future I will be able to do so.*
57. *I'd like to encourage people who travel to Japan to NOT take their country's problems and mindsets with them. Many a time I have had Black people ask me if Japanese had an issue with Blacks. The Black and White hostility that affected/still affects this country (USA) DOES NOT EXIST IN JAPAN. If you aren't Asian you are seen as a foreigner, simple as that. Yes we know that there are issues of Koreans being discriminated against in Japan and I wish such a thing did not happen however the whole Black-White issue in the states does not carry over to Japan for tourists or ex-pats to live in high concern over. Time and time again I am asked about this having lived in Japan for some time and it saddens me that people want to carry that concern over to East Asia and be wary of people because of their skill color and own country's struggle. When one goes to Asia they need to go with a clean slate of the mind and open eyes.*
58. *I would love to visit Japan. I worked with Japanese citizens for several years and I know people who live there. My son is very interested in Japan, studied Japanese for 5 years and visited Japan when he was in high school. Unfortunately, due to the cost, I do not think it will be possible for me to travel to Japan this year or in the next 5 years.*
59. *I would love to travel to Japan at some point in my life. I have a martial arts background and that is where a lot of great martial arts have started. I would love to visit the temples and experience some of the culture. I enjoy Japanese Animation and other things from Japan.*
60. *I would like to see Japan plant more greenery in urban areas (not just parks) and remove/disguise some of the blight in both urban and rural areas (especially the concrete river linings and large arrays of electric and telephone poles and wires). If it can do that and also find ways to help its growing numbers of homeless people to find work and homes, it will become an even more attractive tourist destination than it is now.*
61. *i would like a trip to visit living cultural treasures*
62. *I work closely with Japanese business executives (Honda, Toyota) in America, would get great pleasure from a first-hand, personal understanding of the culture that produces such thoughtful people.*

63. *"I wish the Japanese government would encourage, fund, and help increase awareness of means for non-Asian gaijin to learn Japanese. There are many schools targeted to Chinese and Koreans learning Japanese, but I have found it rather difficult to find schools, short term or long term, traditional or online, that teach non-Asia gaijin Japanese. I do not feel that the Japanese government realizes how many Americans, especially young (teens and college age), are interested in Japan - even in learning the language. We even had students at my university petition to have Japanese taught (lack of funds prevent any expansions, however). When my students discover my wife is Japanese, I am surprised at how many will try to use what Japanese they learned from anime, manga, discussion boards, blogs, and free Internet Web sites in their communication with me. Some even have Japanese writing pads. At the International Days sponsored by the university's International Student Organization, I help my wife and niece staff the Japan booth and it is mobbed by kids (secondary school and college!) wanting paper samurai hats. Almost every child wears one - a sea of paper samurai hats (one year we gave out around 300). And there is always a line of people willing to pay to have their name written in Japanese. And many ask to have their picture taken with my niece who is wearing a traditional kimono. There is a hunger and thirst for Japan in the U.S. that is somewhat dormant, overlooked, and insufficiently tapped."*
64. *I was so lucky that I know someone that lives in Japan. I would have got lost in the subways if it wasn't for her, and I still would have been lost there. I am going back in August and would recommend anyone going.*
65. *"I was in Japan in 2009, and it was a very enjoyable trip. The cities were very clean and safe, much more than other cities I've been in. I did see a lot of squat toilets in most places I went, but there was almost always at least one flush toilet.*
66. *The quality and variety of Japanese food is really quite amazing, although some Americans may find it hard to get used to. It may seem expensive, but if you shop at a supermarket and cook your own food instead of always eating out, the price goes way down.*
67. *Kyoto was by far my favorite city because of all of the cultural properties that it is endowed with, and also because the atmosphere of the city is very calming and laid back compared to say Osaka or Tokyo. The chance of seeing a geisha whenever I walked around the city was also rather thrilling.*
68. *I really liked Japan's rail system because it was so convenient. One thing I didn't like was that the lines that ran through the countryside were rather expensive compared to the lines in cities, although I understand the reasons for that.*
69. *I was amazed at the availability of English language materials, especially in Kyoto and Tokyo. I speak Japanese fairly well, so I wouldn't have needed them, but someone who knew no Japanese would have an easy time getting around in those two cities in particular."*
70. *I traveled to Japan, from Guam, many times in the 1956-1958 time-frame while in a US Navy aircraft squadron, visiting with a family that my father had known from before WW-I, and, with family members, visited historic and cultural places during leave times. My next visits came during the 1980's, on business and personal matters, and again, visiting the Japanese family. It was somewhat of a shock to see the transformation of numerous cities and cultural places adversely affected by the results of modernization and 'progress.' Much was necessary building and congestion but it seemed to take away some of the charm of the Japan I knew from the 1950's. The cost of food and hotel rooms was itself a shock.*

71. *I traveled to Japan in 2009 and had such a great time that I'm going back this year (2010). There were few instances of language problems but they were not insurmountable and I found the prices to be no more outrageous than New York, LA, or London.*
72. *I think traveling to Japan sounds interesting, I am just most afraid of the language barrier.*
73. *"I think that Japan really needs to combat the perception that it is too expensive and nondescript for travelers. For example, I have no idea how expensive travel is in Japan, but having lived and traveled in SE Asia quite extensively I have often heard that Japan is place of luxury and amenities where you can't find a mix of unique culture, hospitality and value. Why travel to Japan when you could go to Thailand and Vietnam? If you want to travel north, why not China?"*
74. *It also seems like there is a perceptions that Japan is just a modern and urbanized locale which is true of some places but probably couldn't be further from the truth for many parts - for my wife and I, we would likely be drawn to those other parts."*
75. *"I think people need to be educated that Tokyo is no more expensive in terms of food, entertainment, and attractions than San Francisco or London. It's really about the same. The big problem, though, is when you have two people traveling together. It's a huge shock to Americans that a hotel room for two costs twice as much as a hotel room for one. We expect only a small increase in price, or no increase. (At a kaiseki ryokan, we might understand a 25-40% increase due to the food, but still not a 100% increase.) To most Americans' way of thinking, this is crazy--we might as well get two hotel rooms! We think of traveling together as a way to save money, not make it more expensive. I actually have a free plane ticket to Japan right now, but we're not going because of the cost of lodging..."*
76. *One other concern that isn't on the list is that Japan has a reputation as being very unhelpful or difficult for vegetarians. I want to bring my vegetarian friend with me when I go back, but I've heard that many Japanese people don't really understand the concept of being vegetarian. Foreign vegetarians who live there say that restaurants try to serve them fish broth, food with small amounts of meat in it, etc. I don't know if that's true or not, because several things I'd heard before I went to Japan myself weren't true. (For example, people said that Japanese people might not sit next to us on trains and subways, but they did. We also had been told that Japanese people were scared to speak English, so we wouldn't get any help if we were lost. That wasn't true, either--every time we took out a map, a Japanese person would come over to us and say 'Excuse me--are you lost? can I help you?' I think there are a lot of misconceptions about Japan...)*
77. *I do wish more people would visit Japan! We went there for our honeymoon when we found out that the cost wouldn't be much more than going to Hawaii. I especially enjoyed seeing some of the places that are famous within Japan but not really outside of Japan, such as Koyasan and Kurashiki."*
78. *I think people are afraid of high cost of trip to Japan in general.*
79. *I think of Japan as an expensive and difficult to access destination (I live on the East coast of the US)and, while interesting, is a low priority travel destination for me. I am a hiker and love the drama of nature and I often think of Japan as over-crowded and formulaic. I went to*

Scotland with a group of friends to hike last Summer, and we could have picked Japan but it was never suggested -- I think because it is far away and difficult to navigate and seen as very urban.

80. *I think Japan is great for first-timers looking to travel abroad as it provides a different perspective on cultures and manners. Living there, however, requires a level of tolerance that maybe one day will change.*
81. *I studied Japanese for two semesters in college. I wanted to do a study abroad program, but my undergraduate program (Audio Engineering) did not allow for me to study abroad and still complete my degree program within 4 years. I am in love with Japanese tradition and culture and see it as an absolute necessity to visit very soon. However I am skeptical of going by myself because it is such a bold endeavor, being literally on the opposite side of the planet and all. It was always one of my dreams to be able to just leave for Japan and teach English at some school for a while, immersing myself in the culture. I have much debt to pay off from being in school, and I have a good full time job here in the U.S. that I do not want to leave so it is just about impossible. I do get vacation time and would like to spend some of it on a trip to Japan, but it is a highly expensive endeavor and my bills don't stop coming. Basically, if it were possible for me to begin working in Japan and still pay off my student loans here in the U.S., I would come over and work in whatever field I could get a job in that would satisfy those requirements.*
82. *I really enjoyed my visit to Japan, but I would prefer to take my next trip outside of big-city Tokyo and visit the more traditional villages and towns. I'm very curious to visit Okinawa, since many big pop stars come from that region. I am also looking forward to finally attending a kabuki play and soak in the hot spring water in a sento.*
83. *I loved my two visits to Japan combining business and pleasure. my second visit was to Osaka with a side trip to Kyoto where I wish I had had more time. It was very difficult to get around Osaka because of the limited English and lack of English signs, except in the train stations where the signs were excellent. Outside the stations, i could not find any help. I would approach students and business people, usually the best bet for English speakers, but rarely could I find anyone and when I did, their directions were not specific enough or easy to follow. I would have liked to have known Osaka better since it has the magnificent Kansai Airport. Fortunately, I did not have these problems so much in Tokyo, Nurita or Kyoto.*
84. *I loved my two visits to Japan combining business and pleasure. my second visit was to Osaka with a side trip to Kyoto where I wish I had had more time. It was very difficult to get around Osaka because of the limited English and lack of English signs, except in the train stations where the signs were excellent. Outside the stations, i could not find any help. I would approach students and business people, usually the best bet for English speakers, but rarely could I find anyone and when I did, their directions were not specific enough or easy to follow. I would have liked to have known Osaka better since it has the magnificent Kansai Airport. Fortunately, I did not have these problems so much in Tokyo, Nurita or Kyoto.*
85. *I love Japan and speak some conversational Japanese. I wish it were closer so I could visit more often.*
86. *I like that the Japanese always have an interst in speaking English. I enjoy learning about their history and customs. Their discipline for learning and intense academic competition is admirable.*
87. *"I have visited Japan several times & stayed for a number of weeks each time*

88. *I find it to be one of the most interesting destinations I've ever visited*
89. *It is hard to navigate at first & seems alien to most westerners but once you get used to it (although that takes some time) it is logical & quite easy*
90. *i would come back to Japan anytime but the costs involved & the culture of travel in Japan is costly"*
91. *I have visited Japan once, for one week. It was an amazing experience that was done through one of my teachers and EF tours. We visited Tokyo, Kyoto, Hakone, and Osaka. I don't really know Japanese, but I have tried studying it. Next year is my first year of College and I will be 19, I plan to study more of Japanese. I also plan to go back to Japan some day, maybe 3 to 5 years from now, but that wasn't a choice on this questionnaire. I took 1000 pictures in 7 days.*
92. *I have never considered traveling to Japan as a tourist destination. However, if someone asked me which Asian country I would like to visit, I believe Japan would be my top pick. My lack of language skills and lack of knowledge about the customs probably intimidate me from considering Japan as a destination. Plus, I just assume that the air travel and hotel would be beyond my budget.*
93. *I have been to Japan twice and studied the language and culture. It is one of my favorite destinations because of the food, culture, and beauty. I love the fact that it is safe and friendly. I always feel it is way more expensive than other Asian destinations. The airfare is about the same but the prices for hotels and food is much different than China, Vietnam, Thailand, etc. But it is more modern so there is a give and take.*
94. *I have been to Japan on three separate occasions. Once as a child/teen, the other as an adult working and living there and most recently as a tourist. When I lived in Japan as a child it was right before globalization, so Japan was extremely different back then than as it is now. One of the joys of going shopping or eating out in Japan is the exceptional customer service you receive. You do not tip them, yet they deserve it more than the uppity and slacker servers you get in the U.S. whom you are supposed to tip (makes me sick thinking about it). The mountains, temples and shrines are absolutely breathtaking. I absolutely love Japan.*
95. *I have always been interested in Japanese art and culture. I have studied print making and Martial arts for many years. I own Japanese pottery, Japanese dolls and have several Japanese prints. I am fascinated at how today's American children love Japanese dolls, cartoons, toys and anime. Thousands of American children study Japanese Karate and learn to speak Japanese in their Martial Arts classes. Japanese culture is taught in American schools and many Americans admire Japan.*
96. *I feel like I can't walk down the street without tripping over some nerdy white guy and a tiny little Japanese girl, and I feel that this stems in part from the school girl image. I tend to have a negative perception of Japanese women from this. I don't feel that I would enjoy going to Japan if the school girl fantasy is a reality. It has been overly sexualized in our culture and has become a turn-off from that aspect of the culture, whether false or real.*
97. *I fear that if Japan gains any more Western tourists (USA, UK, Australia etc), it will suffer a large culture loss like it already has, in my opinion (too many signs only in English etc). It may turn into a country filled with tourists and become on the same levels as Thailand, which would not be good at all for Japan's culture. Right now I feel Japan has the right balance of inbound Western tourists, but am hoping that it doesn't become any more exposed than it already is, and that tourism from Western countries stays about the same as it is now.*

98. *I believe that Japan is a wonderful place for tourism and I would like to be able to visit and someday live there.*
99. *I believe that Japan is a place that everyone should at least experience once in their life. It is such a wonderful country that has the most excellent hospitality. I plan on living there in the future.*
100. *I believe that Japan is a place that everyone should at least experience once in their life. It is such a wonderful country that has the most excellent hospitality. I plan on living there in the future.*
101. *I am interested, but haven't checked it out yet. We will begin to see what, if any, RCI timesharing facilities exist, but we may also travel beyond using RCI.*
102. *I am interested in high speed rail oriented engineering excursions*
103. *I am eager to travel to Japan to learn and see first hand the shinkansen and other uniquely Japanese sites.*
104. *I am a Japanese and see there from USA side. It is still obstacle for foreigners to travel in Japan in terms of lack of sign in English as well as people's communication skill, etc. I also recognized that Japan doesn't promote Japanese cultural aspects to the other countries. We should promote more both cutting edge technologies, products and culture in the foreign countries. May I suggest to have more local Japanese volunteers to support Japanese ambassador to promote 'Japan'?*
105. *Having been to Japan twice, the negative of visiting is the homogeneity. The positives are clean, safe and plenty of interesting things to see and do. Also, a fascinating thing to me is that although Japan is a highly modern country, it is not a Western country. Americans probably equate western with modern. Japan and to a lesser degree Hong Kong, are modern, but not Western. So Americans can experience a different way of looking at and doing things.*
106. *Excellent survey. Thanks for asking the questions.*
107. *Don't know what Yokoso means.*
108. *"Comparing with China, Japan seems to be over-priced in all aspect. Affordability would be the key word to Japanese attractiveness. Japan is too commercially exploited for tourists. More home stay, good-will language guide system, or more signages avoiding language interpretation could dramatically reduce the costs thus foreign tourists' hesitance or even fear to go to Japan.*
109. *"Because I lived in Japan and speak some Japanese, 'Yokoso Japan' campaign is fine for me. The translation to English is not, however, relevant or appealing to most non-Japanese speakers. It is clearly intended for 'domestic consumption' and underscores Japan's inward-thinking when it comes to addressing the travel/tourism requirements of non-Japanese, especially Europeans and North Americans. In addition, web-based information about Japan and Japanese communities/travel destinations, etc. is inadequate and generally presented poorly in 'Japanese-English.'*
110. *Attractive, interesting, but expensive*

111. *As someone familiar with Japan and who has traveled there as a tourist twice in the last two years, I would say that Japan's biggest challenge in becoming a tourist destination is it's perceived as an expensive tourist destination. I did not find this the case when I went to Japan, but I that was my impression before I went there. I believe Japan should also promote more the fact that many Japanese people speak English and are extremely helpful, to the point where you can get around in the major cities without knowing the language if you are patient.*
112. *Affordability will become a significant issue for American travelers, as our national debt and social welfare state consumes a growing portion of our incomes and savings. Don't count on the same level of travel flexibility in the future that you have seen among Americans in the past. Japan would have to be a very good bargain in order to attract Americans with increasingly constrained resources and dwindling dollar purchasing power.*
113. **My wife & I are excited about visiting Japan in June! I worked with the Japanese Security Police in the 60's & looking forward to returning!*
114. **Very interesting to investigate for many reasons.*
115. **I have been to Japan many times and found the people and the country very harmonious. Being a vegetarian, I found it difficult to find food that I could eat. This also prevented me from travelling to rural Japan and spends time with locals. And there was little help for non-Japanese speaking people. Signs in English were not common. However, I am likely to visit Japan again. This time with my family. I love the people, the culture, Japanese engineering and work ethics. Being a vegetarian, I cannot comment on Japanese food which is predominantly consists of fish and meat. It is the people that make Japan great. They are courteous and helpful, always.*
116. ** I suggest promoting Japan as a tourism destination among the midwestern states in the U.S. The perception that Japan is a clean, safe destination would be important to the people of the midwestern states.*
117. **Probably the best high-speed rail system in the world!*
118. ** It would be a terrific experience...I have favorable impressions of Japan and believe my family would enjoy it very much.*
119. **Japan is a very safe and comfortable country to visit. Have encountered some surly immigration agents at Kansai airport. But overall, I would visit again and again.*

**Note: Comments from 113 to 119 came after the statistical analyses were done. Thus their quantitative data are not reflected in the analytical results, but their comments were just as useful.*

6 Survey Analysis - Inferential Statistics

1 Perception of Airfare to Japan being too expensive

Japan has to deal with several perception issues, including but not limited to, airfare being too expensive. We would verify whether it is a serious problem or more of perceptual issues by grouping the respondents into those who went to Japan and those who have never been to Japan. Using the quantitative statistical analytical capability, we put multiple variables to check if any variables would be considered significant to maintain association with those who have perception of airfare to Japan being too expensive.

Stepwise Regression: Q2 versus Q1_1, Q1_2, ...

Alpha-to-Enter: 0.15 Alpha-to-Remove: 0.15

Response is Q2 on 28 predictors, with N = 139
 N(cases with missing observations) = 52 N(all cases) = 191

Step	1	2	3	4	5	6	7	8
Constant	1.947	2.199	1.967	2.738	2.559	2.657	2.433	2.018
Q3	0.485	0.494	0.37	0.365	0.368	0.383	0.376	0.366
T-Value	6.15	6.4	4.03	4.03	4.09	4.26	4.22	4.12
P-Value	0	0	0	0	0	0	0	0
Q42	0.123	0.122	0.119	0.111	0.106		0.093	0.127
T-Value	-2.69	-2.71	-2.68	-2.5	-2.4		-2.1	-2.61
P-Value	0.008	0.008	0.008	0.014	0.018		0.038	0.01
Q4	0.189	0.205	0.202	0.182			0.192	0.196
T-Value	2.41	2.63	2.61	2.33			2.48	2.55
P-Value	0.017	0.01	0.01	0.021			0.014	0.012
Q1_2	0.185	0.258	0.259				0.247	0.212
T-Value	-2.11	-2.6	-2.63				-2.52	-2.13
P-Value	0.037	0.01	0.01				0.013	0.035
Q1_14	0.121	0.172					0.139	0.138
T-Value	1.55	2.06					1.64	1.64
P-Value	0.124	0.041					0.103	0.104
Q1_8	0.109						0.177	0.177
T-Value	-1.69						-2.4	-2.41
P-Value	0.094						0.018	0.017

Q1_9						0.135	0.152	
T-Value						1.85	2.08	
P-Value						0.067	0.04	
Q39							0.086	
T-Value							1.65	
P-Value							0.102	
S	0.849	0.83	0.816	0.806	0.801	0.796	0.789	0.784
R-Sq	21.63	25.59	28.66	30.96	32.18	33.61	35.29	36.62
R-Sq (adj)	21.06	24.5	27.08	28.9	29.63	30.59	31.84	32.72

Among the variables, Q3 (perception of domestic transportation costs being too high), Q42 (previous trip to Asia), Q4 (perception of accommodation costs being too high) and Q39 (frequency of travel abroad) remained as significant, together with image-related variables of Q1-2 (old culture), Q1-14(mountain), Q1-8 (modern literature), and Q1-9 (movies).

The result depicts more detailed profiles of those who perceive the airfare to Japan being too expensive, and we hope the knowledge would help Japan make better planning on its destination marketing efforts.

Those who perceive airfare to Japan being too expensive

- also have a perception that domestic transportation costs within Japan being too high (strong + sign on Q3)
- have less experiences of traveling to Asia (- sign on Q42)
- have a perception that accommodation costs within Japan being too high (+ sign on Q4)
- have more experiences of travel abroad on business and pleasure (+ sign on Q39)

Associations with those variables demonstrate that perception of price being too high would remain to be the imminent marketing challenges for Japan which has to communicate the updated reality with potential visitors to Japan, particularly those who travel often to Europe but not traveled to Asia.

[Image-related Variables]

Some of the image-related variables remained in the selection processes as significantly associated with Q2 "Airfare to Japan being too expensive".

Those who perceive airfare to Japan being too expensive

- are less likely to have image of Japan associated with old culture (- sign on Q1-2)
 - *In other words, those who associate Japan with old culture are less likely to share the perception that airfare to Japan being too expensive*
- are more likely to have image of Japan associated with mountain (+ sign on Q1-14)
 - *In other words, those who associate Japan with mountain are more likely to share the perception that airfare to Japan being too expensive*
- are less likely to have image of Japan associated with modern literature (- sign on Q1-8)
 - *In other words, those who associate Japan with modern literature are less likely to share the perception that airfare to Japan being too expensive*

- are more likely to have image of Japan associated with movies (+ sign on Q1-9)
 - *In other words, those who associate Japan with movies are more likely to share the perception that airfare to Japan being too expensive*

Now, those finding would require some interpretation as to how Japan can make better use of them. Those who are fascinated to Japan because of old culture and modern literature can be considered as already being familiar with reality that it is not expensive, or they may be just indifferent in perceived price being higher due to their affection to Japan. In that case, Japan has to continue to take good care of those existing customers to retain them.

Japan has to do homework of how to market Japan to those who are fascinated with mountain trekking or movies. If we make an assumption that those hobbies are more likely to be enjoyed by younger respondents, they are also less likely to have traveled to Japan/Asia, thus remain prone to a perception shared by mass public that airfare to Japan being too expensive. If the reality is in line with the perception, there would be fewer rooms for Japan to maneuver. If reality is that airfare to Japan is not expensive but the most competitive compared to major tourism destinations in the world, it would be a great pity that Japan does not capitalize on such opportunity to communicate to potential visitors about the gap between perception and the reality.

[Reference: Sample Airfares to Selected Destinations from Washington DC]

Due to prevalence of perception that airfare to Japan being too expensive, we feel compelled to check the actual two-way discount airfares from Washington D.C. to major cities in the world, both in Europe and in East Asian to put the price of airfares to Japan in perspective. We simply chose one day of observation and put the results in one table. The price quoted was with the cheapest discounted economy class two-way fare with the same day of departure and return.

6/2/2010 – 6/17/2010 from Washington DC (according to the cheapest fare in discounted economy class in Orbitz.com as of 5/30/2010 – Total costs are inclusive of all taxes and fees)

Destination (two way tickets)	Total Cost (from Washington DC)
Narita, Tokyo, Japan	\$1,210
Beijing, China	\$2,173
Seoul, Korea	\$1,739
London, UK	\$1,391
Paris, France	\$1,565
Berlin, Germany	\$1,334

To our surprise, the airfare to Narita (New Tokyo International Airport), Japan was not only cheaper than other capital cities in East Asia, but also the cheapest even among two-way airfares to capitals of United Kingdom, France and Germany. It appears that airfare being too expensive is a myth created among the perception of respondents with outdated information.

Planned increase in flight services to Haneda airport would present a golden opportunity for Japan to communicate the reality to potential visitors to Japan, particularly those who travel often to Europe but never traveled to Asia, as the increased capacity would most likely to offer competitive air fares to potential visitors in the USA. However, the most important lesson to be learned from here, would be that there had not been effective communication from Japanese government or travel companies about the facts on airfares. The message has to be communicated effectively to those who are price-sensitive,

and particularly to those who are logically assumed to be more price-sensitive – younger generation who are fascinated with modern culture or natural trekking opportunities.

2 Who are afraid of language barriers?

Japan has to deal with several perception issues, including but not limited to, language barriers. We would verify whether it is a serious problem or more of perceptual issues by grouping the respondents into those who went to Japan and those who have never been to Japan. Using the powerful statistical analytical capability, we put multiple variables to check if any variables would be considered significant to maintain association with those who have perception of language barriers.

Among the variables, Q45 (knowledge on “Yokoso Japan” campaign), Q46 (previous trip to Japan or not), Q39 (frequency of travel abroad), Q42 (previous trip to Asia) remained as significant, while variables which were considered as insignificant were dropped in the processes.

The result would show more detailed profiles of those who are afraid of language barriers, so that Japan can plan better to mitigate their concerns.

Those who are more afraid of language barriers in Japan

- also found “Yokoso Japan” campaign more unclear and unfriendly (+ sign on Q45)
- have never traveled to Japan in the past (- sign on binary responses of Q46 which are created by researchers based on answers on Q41)
- have more experiences of travel abroad on business and pleasure (+ sign on Q39)
- have less experiences of traveling to Asia (- sign on Q42)

Stepwise Regression: Q8 versus Q1_1, Q1_2, ...

Alpha-to-Enter: 0.15 Alpha-to-Remove: 0.15

Response is Q8 on 29 predictors, with N = 138
N(cases with missing observations) = 53 N(all cases) = 191

Step	1	2	3	4
Constant	1.982	2.496	2.209	2.245
Q45	0.327	0.275	0.235	0.236
T-Value	3.86	3.30	2.75	2.80
P-Value	0.000	0.001	0.007	0.006
Cal 46		-0.62	-0.67	-0.56
T-Value		-3.29	-3.56	-2.91
P-Value		0.001	0.001	0.004
Q39			0.114	0.169
T-Value			1.88	2.57
P-Value			0.062	0.011
Q42				-0.132
T-Value				-2.07
P-Value				0.040

Note: Cal 46 was calculated by researchers by converting the answers for Q41 into binary data of 0 and 1, in a way that those who never traveled to Japan are assigned 0 and those who traveled more than once are given 1.

[Double-edged Sword of the past “Yokoso Japan” Campaign]

These findings show that those who have never traveled to Japan are more prone to a perceived fear of language barriers, and also the unique campaign of visit Japan called “Yokoso Japan” might have fueled such fear in the mind of those who have never visited Japan, an unintended sad consequences of the innocent efforts by Japanese government. At the same time, “Yokoso Japan” might have given intended positive effects on those who studies Japanese, the segment which are more likely to visit Japan anyway. This underscores the nature of double-edged sword of using non-English (Japanese) language in the global destination marketing campaign.

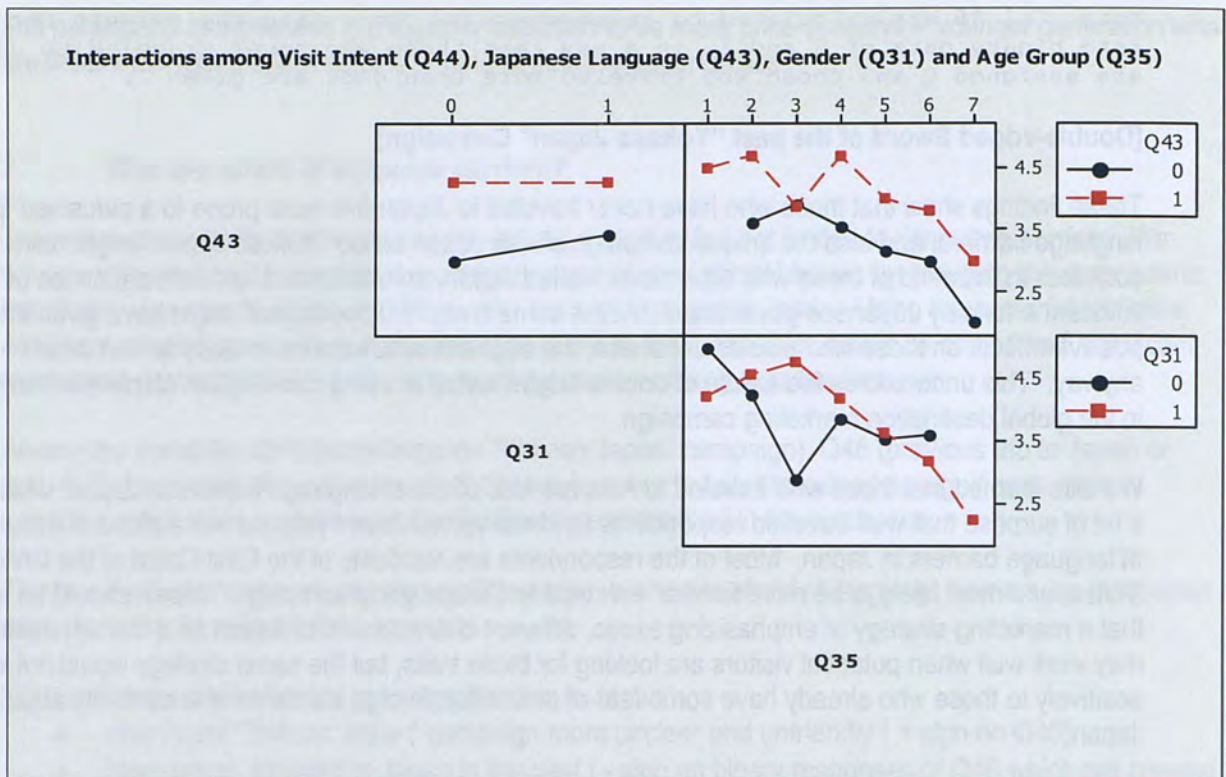
We also learned that those who traveled to Asia are less afraid of language barriers in Japan, while it is a bit of surprise that well-travelled respondents (and not visited Japan yet) are more afraid of assumption of language barriers in Japan. Most of the respondents are residents of the East Coast of the United States, and most likely to be more familiar with trips to Europe geographically. Japan should be aware that a marketing strategy of emphasizing exotic, different characteristic of Japan as a tourism destination may work well when potential visitors are looking for those traits, but the same strategy would not work positively to those who already have some fear of unfamiliar, foreign elements of uncertainty about Japan.

This underscores the importance of “destination marketing” - communicating to different segments with different solutions to their needs respectively based on analysis of quantitative data, instead of conveying one single message for all the people in the world as a part of unilateral sales efforts.

This recommendation assumes that Japan understands the difference between sales and marketing – sales being the unilateral disposition of the inventory of tourism commodities and marketing being offering solutions to the needs of different visitors preceded by the quantitative research on their needs.

3 Segmenting Groups with Imminent Intent to Visit Japan

Thanks to cooperation from respondents, we have multiple variables, which are generally assumed to be independent to each other, namely, they are not interfering with each other. However, it is more prudent to investigate whether there are certain patterns of associations among variables, such as effects of age, gender to their intent to visit Japan. In other words, we will check whether variances among variables and within smaller segments are equal across data or not. This is another quantitative analysis to utilize demographic data, collected anonymously, to deepen our understanding over thoughts and behaviors of different segments of potential American tourists to Japan.



We will pick up the Japan visit intent (Q44) as the variable of our highest interest (as we aim to promote inbound tourists from USA to Japan), and see whether some other variables, such as gender (Q31), age (Q35) and previous learning experience of Japanese language (Q43) would play a role in affecting the visit intent. In other words, we analyze if the variances exist with the decomposed segments along the line of gender and age.

Since the visit intent (Q44) is placed on the Y-axis, vertical positions of each line show the level of their intent to visit Japan, where higher the line, the higher the intent to visit Japan. Among the three graphs, the top left one shows the effects of previous learning experience of Japanese (Nihongo) and the gender. Red (dotted line, with squared terminals) represents those who studied Japanese (Yes = 1) and the Black (solid line with rounded terminals) represents those who did not study Japanese (No = 0). In the same graph, left dots on each line are placed along the horizontal x-axis under zero (0), which represents the answer of "female" and right dots on each line under one (1) represents those who answered "male". This graph (upper left) shows that those who study or studied Japanese appear to be more likely to have higher intent to visit Japan.

We look at the second graph (upper right) where Q43 (Japanese language learning experience) and Q35 (age group) interact with Q44 (Visit Intent). Y-axis remains the same to represent the level of their intent to visit Japan, and the X-axis (from left to right) shows the age group from low to high, "2" being the 20~29, "3" being 30~39 etc. Again with the exception of the 30~39 years group, experience of learning Japanese language clearly increases their intent to visit Japan all across the ages – red line is higher than black line. One thing to note is the general downward trends for both slopes as the age goes up. Travel distance may become more troublesome as people age and that may explain the negative slope.

We look at the third graph (lower right) where Q31 (gender) and Q35 (age group) interact with Q44 (Visit Intent). Red (dotted line, with squared terminals) represents male (= 1) and the Black (solid line with rounded terminals) represents female (= 0). A male in his 30s have highest visit intention, but such

intent declines as he ages, while a female in her 30s has the lowest visit intention, which becomes steady as she ages. It is noteworthy that those in their teens (18~19) have high visit intention, while their income levels are not very high in their lives. It would be strategically important for Japan to communicate with each age group with different focus and present solutions to their concerns.

Those concerns surely include ones based on perception only and different from reality – as we pointed out the airfare issue. Japan surely has great opportunity to speak up effectively to communicate the message to targeted audiences, who can be turned into visitors to Japan. We reiterate the importance of quantitative, data-driven destination marketing on a larger scale, if the Japanese government seriously wishes to achieve their goal of “tourism nation”. While the idea of strategic communications to different segments is the core of destination marketing technique, we find few evidences Japanese government, its affiliated tourism organization (such as Japan National Tourist Organization), or any of the DMO (Destination Marketing Organization: or CVB = Convention and Visitors’ Bureau)’s engagement with such scientific marketing efforts towards potential American visitors to Japan.

We demonstrate that even within the United States, there are enough variances of preferences, concerns, tastes and needs. Similar research should be conducted with each and every different feeder markets, including all the target nations in the world to ensure effectiveness of Japanese global campaign.

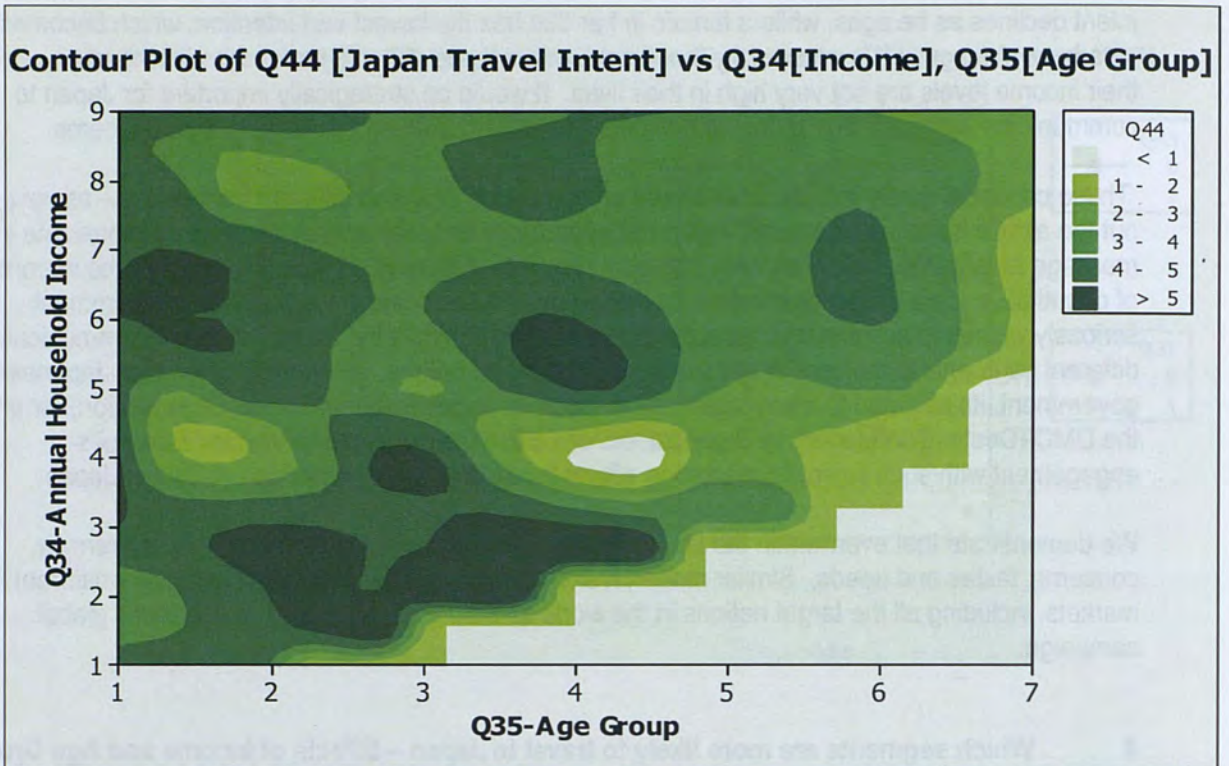
4 Which segments are more likely to travel to Japan – Effects of Income and Age Group?

While this is not purely inferential statistics, we can plot relevant data to make visual presentation of the importance of segmentation. The figure we present is called a contour plot, which is basically the same presentation method as a traditional map with contour. The two-dimensioned map can express three variables, and we put Q35 [age grouping] as X-axis (horizontal), Q34 [annual household income grouping] as Y-axis, and likelihood of visiting Japan as Z (contour – the higher the intent, the higher the contour would be).

If the segmentation either by age or by income has no effect over their intent to visit Japan, the map should look very flat, without any mountains or valleys. If everybody has the similar high interest in visiting Japan, the map would look like a high plateau. If nobody has any interest in visiting Japan, the map would show flat low-land.

The contour plot below shows that there are obviously some high mountains, which represents segments with high interest in visiting Japan. They are (1) younger age group with lowest annual income group (age: 20's to 40's, income: up to \$30,000 annual income), (2) young group with relatively high income (age: 18 to 20's, income \$60,000), (3) young professionals (age 20's to 30's, income \$40,000), and (4) matured professionals (age: 30's and 40's, income around \$60,000). Interestingly enough, group (1) would be logically assumed to be sensitive to price (costs) of traveling to Japan, but they are highly interested in traveling to Japan. If the Japanese government would like to launch affordability campaign, they should particularly aim at this segment, as the price is likely to be the only barrier for them to make a trip.

On the contrary to some people's assertion, the higher income will not increase their interests to travel to Japan. As we demonstrate, there are lots of intricate correlations among different variables, but some



variables, such as “prior learning experience of Japanese language” would be more powerful to persuade them to travel to Japan, than such factors as “annual income”. It is noteworthy that relatively large numbers of people all across the age and income group show level of 3 and higher as their intent to travel to Japan.

Having identified segments with high intent to visit Japan, we should ask a simple question to ourselves – whether all those segments’ needs are identical, or different. It is plausible that segment (1) young, lower income, but high curiosity group may have different interests in Japan from (4) matured professionals, even though they both have strongest interest in visiting Japan.

Therefore, this is another example to underscore the importance of scientific destination marketing, in which Japan has to ask potential visitors’ needs to provide them with type of tourism commodities to fulfill their needs.

5 More Likely People to Travel to Japan – what are they associated with?

What kind of traits and opinions do the people who are more likely to travel to Japan share? We use the stepwise regression model to identify some variables which are strongly associated with those who are more likely to make a trip to Japan. Please note that this model is not proving any causality, rather it shows significant associations between the travel intent to Japan and other variables.

The first variable that was identified as significantly associated with higher intent to travel was Q45 “Awareness of “Yokoso Japan Campaign”. As mentioned, Yokoso Japan campaign has an interesting effect as a double-edged sword – it encouraged people who are already familiar with Japan, Japanese language to visit Japan effectively. But the Yokoso Japan campaign appeared to have fueled a feeling

of fear and uncertainty among those who are not familiar with Japan, its language etc. Either way, it has strong association with "Japan Travel Intent" in that the more people are familiar with Yokoso Japan campaign, the higher they have intent to travel to Japan.

Stepwise Regression with "Japan Travel Intent" as a Dependent Variable

Step	1	2	3	4	5
Constant	5.147	3.729	3.21	3.911	3.712
<i>Q45 "Yokoso Japan Campaign" (1=highly familiar, 5 highly unclear and unfriendly)</i>					
Q45	-0.587	-0.507	-0.375	-0.367	-0.363
T-Value	-5.95	-4.96	-3.18	-3.14	-3.14
P-Value	0	0	0.002	0.002	0.002
<i>Q1-5 "Image as tourism destination" (highly likely = 5, highly unlikely = 1)</i>					
Q1_5		0.29	0.28	0.36	0.29
T-Value		2.48	2.41	2.93	2.29
P-Value		0.014	0.017	0.004	0.024
<i>Q43 "Prior learning experience of Japanese Language" Yes = 1, No = 0)</i>					
Q43			0.53	0.59	0.58
T-Value			2.16	2.4	2.39
P-Value			0.032	0.018	0.018
<i>Q1-11 "Image of Manner of people" (highly likely = 5, highly unlikely = 1)</i>					
Q1_11				-0.25	-0.32
T-Value				-1.9	-2.39
P-Value				0.06	0.018
<i>Q1-15 "Image of Ocean/Sea" (highly likely = 5, highly unlikely = 1)</i>					
Q1_15					0.22
T-Value					2.08
P-Value					0.04
S	1.25	1.23	1.21	1.2	1.18
R-Sq	20.31	23.72	26.23	28.14	30.36
R-Sq(adj)	19.74	22.62	24.62	26.02	27.78

Also when people think about Japan as a tourism destination, they are more likely to travel to Japan as the strong association is verified with Q1-5 "Image as tourism destination". Again we cannot assume the causality between the two variables. Q43 "Prior learning experience of Japanese language" has strong association with travel intent to Japan. Having said so, we encourage Japanese government to acknowledge that "spreading Japanese language courses" would have a positive impact on the increase of Japanese export (= American tourists' visit to Japan has the same effect as Japanese exports in terms of cash flow between nations). Technically, we cannot assume any causality but it may be plausible for us to assume that learning Japanese language would make students feel like traveling to Japan. Q1-11 "Image of Manner of People" would be a tricky one to interpret, as its negative sign on the T-value means "the less you associate Japan with "manner of people", the more you are likely to travel to Japan." If American people think less about "manner of people" in Japan, they are more likely to travel. The researcher did not specify the adjective such as "good" or "bad" manner of people, so the

interpretation on this became rather puzzling. Q1-15 "Image of Ocean/Sea" had a mixed image among all the respondents, but it appears that the more you have an image of Japan associated with Ocean/Sea, the more likely the person has higher intent to travel to Japan. This is an interesting implication to a region such as Okinawa, which is overwhelmingly dependent on Japanese domestic tourists and is not well marketed to overseas visitors to Japan.

End of report

