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ANALYSIS OF INFORMATION AND AFTER SALES SERVICIES FOR INTERNATIONAL TOURISTS TO JAPAN

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This study examines the Japanese Tourist Industry from the perspective of the International Visitors coming to Japan. It focuses in particular on the systems for informing travellers about travel opportunities, and the systems which facilitate them. This is achieved through a survey of visitors returning home from Japan via Osaka International Airport. The emphasis of this survey was on the visitor's perception of

a) the information servicers provided (both in and outside Japan), and

b) after sales services provision in Japan.

Conclusions are then drawn with regards to the provision, promotion and distribution of information and after sales services, and possible improvements are discussed.

1. INTRODUCTION

Provision of information and other after sales services should be tailored to the demands of the consumer. Mackay (1989) points out that the concept of service quality may differ between providers and consumers. It is therefore important for tourism producers (e.g. JNTO) to be aware of both

(1) the expectation of consumers regarding how a service should operate and

(2) the perception consumers have of the service provided.

The problem is exacerbated by a lack of uniformity in the kind of service given and in the expectations of the individual consumers. This makes the measurement of "service quality" highly subjective and experience related.

Nevertheless, no matter how difficult the conceptualisation of high quality service is in academic terms, in the real world some feedback regarding

(1) existing service provision and

(2) lack of service provision

is necessary for the tourism providers to remain in touch with their consumers and meet their needs efficiently and effectively.

2. JNTO RESEARCH

The JNTO carries out a wide range of research related to the promotion of Japan overseas and the facilitation of travel in Japan after tourists arrive. The JNTO's market studies of the main tourist generating areas examine the leisure characteristics of the country, the national tourist industry and the kind of overseas travel enjoyed by its citizens. As well as these, the JNTO compiles data on overseas visitors to Japan. This research can be divided into two types - regular research and "one-off studies".

(1) Regular Research

Statistics concerning International Visitors to Japan are collected regularly by the Ministry for Transport, the Ministry of Justice, the Bank of Japan and other tourism related organisations. These are then compiled by the JNTO and are published approximately annually in both Japanese and English.

(2) "One-off Studies"

The JNTO also conduct specific surveys aimed at certain aspects of the industry such as tourist expenditure, itineraries and travel planning methods. In these surveys some self-evaluation is attempted, but not carried out to any great extent. So while these surveys appear useful in terms of finding new activities and places to promote, they do not cover the use and perception by foreign visitors of existing services.

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3. SURVEY OBJECTIVES AND METHODS

Since specific data was not available, it was decided to undertake a survey of foreign visitors to Japan which focused on travel information and after sales services as well as considering the kinds of people (in terms of socio-economic, demographic and travel behaviour characteristics) for whom these services are provided.

The main objectives of the survey are summarised below:

(1) To examine the level of awareness amongst visitors to Japan of the JNTO information provision services and other after sales services.

(2) To examine the use of the information and after sales services.

(3) To analyse the perception of the information and after sales services (good/bad, useful/non-useful etc.).

(4) To examine in general how visitors coped with their experience in Japan.

The survey was carried out during the months of August and September of 1989 at Osaka International Airport. That airport accounts for 13.3% of all foreign arrivals into Japan (second only to the New Tokyo Airport at Narita), so it is hoped that this sample is fairly representative of all foreign visitors to Japan. Four hundred and sixteen non-Japanese travellers were interviewed at the entrance to the International Departures Gate. The respondents mainly comprised of departing foreign visitors, but sometimes included other foreigners intending to remain in Japan longer who were visiting the airport for some other reason. Since the number of foreigners in the designated survey area at any one time was small, an attempt was made to survey the entire population of the sampling frame, therefore no specific sampling technique was employed. Nevertheless at times this was not possible so not everyone who passed through the interview area was interviewed.

4. QUESTIONAAIRE DESIGN

The questionnaire sheet (see Appendix 4) consisted of four main sections. Section A covered general socio-economic and demographic details. Section B examined the respondents general travel behaviour and general facts about this trip to Japan. Section C, the core of the questionnaire, examined the awareness, use and perception of information sources and other after sales services. Section D examined specific details of the trip (itinerary, accommodation, transportation) and how the respondent dealt with these arrangements. In many cases Part D served as a check on Part C as it made the respondents think more clearly about how they used different information sources and services to cope with travelling in Japan.

Sections A and B consisted of simple direct questions and where possible the answers were pre-categorised to facilitate final processing. In Section C, to ascertain which information sources were used, a list of common sources was compiled and the respondent asked to check the sources which (s)he used, ranking the three most important. To discover awareness levels of information sources, respondents were asked to note which of the suggested sources they did not know were available.

5. INTRODUCTION TO THE RESULTS

After examining the graphs describing the general characteristics of the sample covered by this survey, it was decided to analyse the results by investigating the differences between the main market groups. Market groups can be defined by a variety of characteristics, and in this study the following two market definitions were considered:

(1) SPATIAL - where the markets are defined using spatial constraints. Here respondents are grouped according to their country of origin.

(2) MOTIVATIONAL - where the markets are defined by looking at the reason people travel. Here respondents are classed as business travellers, sightseers etc.

Figure-1 shows the division of the Spatial markets in the current survey. At this point it should be remembered that this survey was aimed at examining Non-Asian visitors to Japan and hence excludes 53% of foreign visitors to Japan.
With that in mind we can see that there are two main Non-Asian Markets - North America and Western Europe. The top seven countries individually being the USA., the United Kingdom, West Germany, Canada, France and Italy.

Figure-2 shows that there are four main Motivation groups: Business travellers, temporary workers in Japan, people visiting friends or relatives and those on sightseeing trips. These different market groups will have some information and after sales service demands in common, but will also have demands specific to their market group.

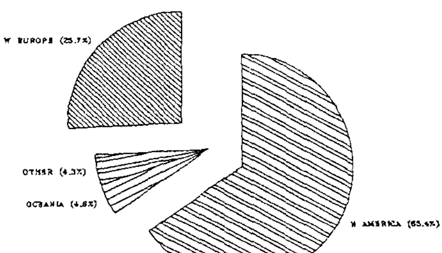


Figure-1 The division of spatial markets.

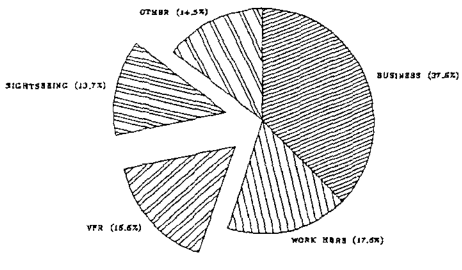


Figure-2 The division of motivation markets.

6. ANALYSIS OF BASIC CHARACTERISTICS

These results show that the most common kind of visitor to Japan is a fairly young, American, male business traveller who does not speak Japanese. However it is clear from examining the results more closely that there are many different types of people visiting Japan.

(1) SEX: More men (65.6%) than women (34.4%) visit Japan.

This correlates with JNTO statistics and reflects the world-wide higher propensity for men to travel than women. As well as this Osaka International Airport has a high proportion of business travellers which are also more likely to be men (see Figure-3). Examining the other Motivational Market Groups, we can see that the leisure motivated groups have a fairly equal sex distribution while for those groups motivated by work, men are dominant. This may reflect Japan's image as a male dominated culture (especially in business spheres), but it also reflects the current world situation with regards to the proportion of women in paid employment. There was no significant difference between the two main spatial markets.

(2) AGE: The results on the age of the sample (see Figure-4) did not compare so well with the JNTO statistics, this study's sample being significantly younger.

(3) NATIONALITY: The nationality distribution has already been described in Section 5 (Figure-1). History explains why the number of American visitors to Japan far outweighs that of other nationalities. Strong post war ties with America have resulted in high business traffic as well as a keener interest in Japan as a Sightseeing destination. It will be interesting to see whether, in the next couple of decades, strengthening business ties between Europe and Japan will also result in a more general exchange reflected by non business related tourism as seems to be the case in America.

(4) OCCUPATION: Occupations were difficult to classify as there was insufficient time during the interviews to ask specific questions. Nevertheless, it seems that due to the season there were a large number of Students and Academics. Figure-5 shows the other main occupation groups. It should be noted that many respondents who came to Japan to teach English do not consider their occupation to be English Teaching.

(5) FAMILY STATUS: 56.7% of the sample were married and 47.4% of the sample have children. No JNTO data was available for comparison.

(6) JAPANESE ABILITY: Japanese Ability is usually low (see Figure-6). Examining the spatial market groups, it seems that North Americans have greater confidence in speaking some Japanese than their Western European counterparts. Approximately 70% of Western Europeans questioned said they could not speak any Japanese while only about 50% of North Americans admitted to complete inability. This reflects the greater familiarity North Americans feel for Japan but also may be due to different ideas as to what "speaking a little Japanese" entails. It was interesting to note that very few non-Native English speakers requested information in other languages.

(7) TRAVEL BEHAVIOUR AND EXPERIENCE: The results show that for many people this trip was their first in the last year, and that for nearly 10% of the sample this was their first trip abroad

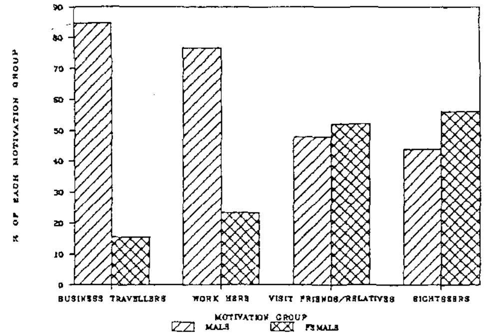


Figure-3 The sex distribution of the different motivation groups.

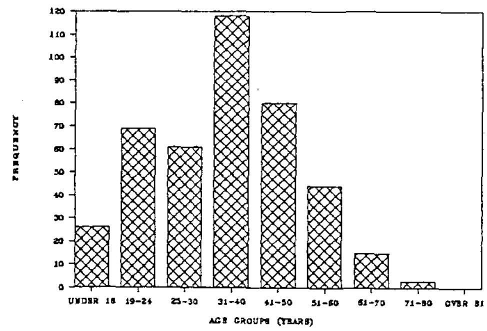


Figure-4 The age distribution of the sample.

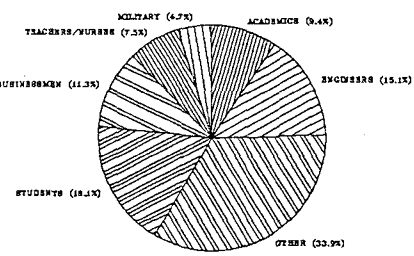


Figure-5 Occupation structure of the sample

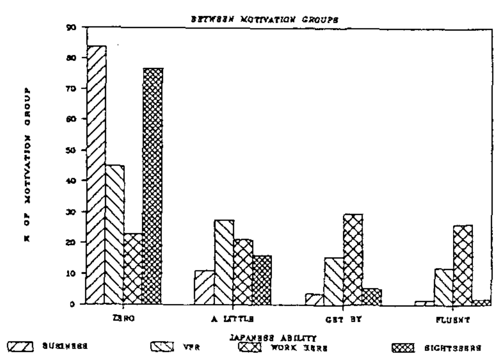


Figure-6 A comparison of Japanese ability between the different motivation groups.

ever - a surprising number of first time travellers. Western Europeans travel internationally more than North Americans (having more opportunity) (see Figure-7) Of the Motivation Market Groups, Business travellers are the most prolific travellers.

(8) BRAND LOYALTY: In the tourism industry "brand loyalty" (using the same company repeatedly) is not the norm. Therefore it was surprising to discover the amount of people who usually used the same airline or travel agent, with only 45.4% of the sample claiming to "shop around" for the best arrangements (Figure-8).

7. TRAVEL BEHAVIOUR ANALYSIS

This section includes all the results detailing the actions and behaviour of the sample on this specific trip except for those concerned with information sources or after sales services.

(1) MOTIVATION: In the last Chapter it was stated that there were four main motivation groups in the sample (see Figure-2). Table-1 shows how JNTO data on motivation differs quite considerably from this study's results, but Table-2 shows that this can be partially explained by this study's exclusion of the Asian Market (which generates more visitors with tourist visas than average) from the overall results.

The other reasons for this survey's bias towards business travellers (as mentioned before) are:

a) the survey took place at Osaka International Airport which is a business oriented airport,

b) many business travellers and individuals who ultimately start working in Japan come to Japan on Tourist Visas which artificially inflates JNTO official figures.

The discussion of specific figures aside, all sources show that while Japan's business tourism sector is relatively large, Japan is not a major mass-market tourist destination.

(2) DURATION: Figure-9 shows that, in the current study, many visitors to Japan stay less than one week, but at the other end of the scale there are many who stay months or years (mainly for educational, training or work purposes).

(3) VISITING OTHER COUNTRIES: Over 30% of visitors combine their trip to Japan with stays in other countries (see Figure 10). Usually the other countries were also in the Asia area but some visitors (using "round the world tickets" had a global itinerary).

(4) PACKAGED TRIPS AND TRAVEL COMPANIONS: Less than 20% of those interviewed claimed to be on any sort of package holiday. The majority were travelling with other people (see Figure-11).

Table-1 JNTO information and this study's Results regarding relative Motivation Group sizes

DATA SOURCE	MOTIVATION GROUP Tourists	Business Travellers	Others	TOTAL
JNTO 1988*	52.0%	31.5%	16.5%	100%
JNTO August 1989**	57.6%	20.8%	21.6%	100%
This survey	30%	55%	15%	100%

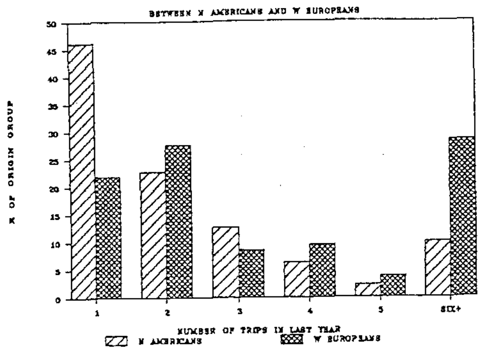


Figure-7 A comparison of the number of trips abroad taken in the last year between the North American and West European markets.

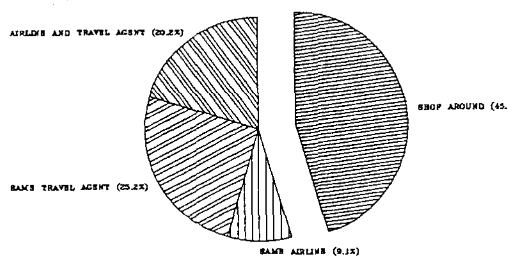


Figure-8 A pie chart showing the extent to which the sample relies on the same airline or travel agency.

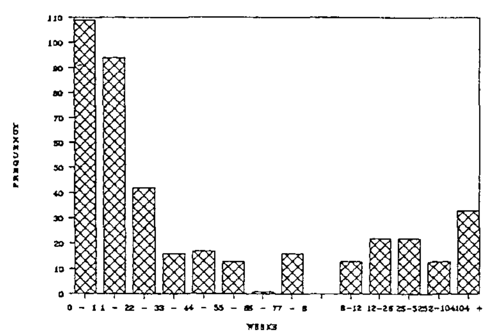


Figure-9 The trip duration of the sample.

Table-2 JNTO Information regarding Motivation Group Size by Tourist Generating Region.

MARKET	DATA SOURCE	MOTIVATION GROUP Tourists	Business Travellers	Others	TOTAL
ASIA:	1988*	52.9%	24.6%	22.5%	100%
	August 1989**	59.5%	15.3%	25.2%	100%
NORTH AMERICA:	1988*	56.2%	35.2%	8.6%	100%
	August 1989**	56.2%	29.3%	14.5%	100%
EUROPE:	1988*	43.4%	46.8%	9.8%	100%
	August 1989**	52.1%	33.1%	14.7%	100%

* Source: JNTO (March 1989) "Statistics on Tourism Japan 1988

** Source: JNTO (November 1989) "Visitor Arrivals and Japanese Overseas Travellers" 1989

(5) ACCOMMODATION: Western Style hotels (see Figure-12) were the most common form of accommodation. However as Figure 5.9 shows, the tendency towards trying other kinds of accommodation varied with the type of visitor to Japan - pleasure travellers being far more likely to try the Japanese style hotels (ryokans) than business travellers.

(6) ITINERARY: The popularity of Tokyo and Kyoto as places of overnight stays was not as high as expected: only 35% of the sample stayed in Tokyo and only 37% in Kyoto, while approximately 45% did not stay in either of the two cities during their time in Japan.

8. ANALYSIS OF INFORMATION AND AFTER SALES SERVICES

8-1 ANALYSIS CONCEPTS

This section concerns the information sources and other after sales services available to the foreign visitor. The key to this part of the analysis is the concept that "being informed" is not an either/or situation - there are degrees of being informed. Also, it is important to be aware that "being informed" does not necessarily mean that the actions based on that information are optimal.

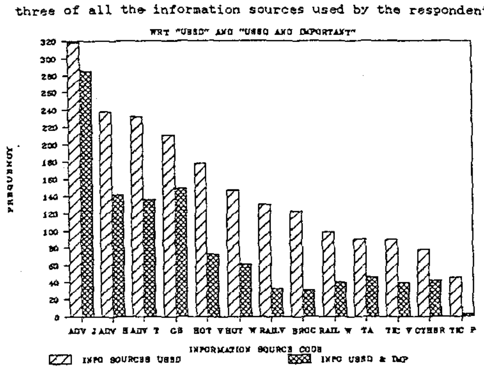
These concepts are best illustrated in Pred (1967). He designed a Behavioural Matrix to describe and understand decision making. He postulated two variables: an individual's ability to use information and the quantity and quality of the information (see Figure-13). The point B_{nn} being where the individual is optimally informed.

Although aimed at industrial location theory and decision making, this matrix is capable of wide application. In the case of travel, an individual must have access to a variety of high quality information sources and be able to use them effectively if (s)he is to plan an optimal trip.

8-2 INFORMATION SOURCES

(1) INFORMATION USE AND IMPORTANCE

Figure-14 illustrates the overall use level of each information source, and the frequency with which each information source was both used and considered important - that is ranked in the top three of all the information sources used by the respondent.



KEY: ADV J = Advice from Japanese in Japan; ADV H = Advice from people at home; ADV T = Advice from other travellers; GB = Guidebook; HOT V = Verbal information from hotel staff; HOT W = Written information from hotel; RAIL V = Verbal Information from railway staff; BROC = Brochure; RAIL W = Written information from railway; TA = Information from a travel agency; TIC V = Visit to the Tourist Information Centre; TIC P = Phone the Tourist Information Centre; OTHER = Other information sources not listed.

Figure-14 Results of the frequency with which information sources were used and were considered important.

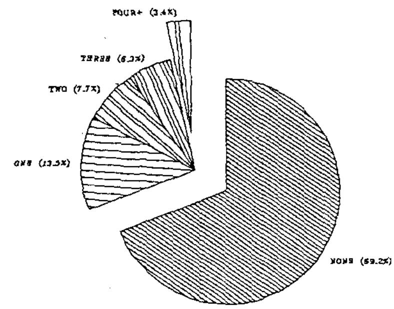


Figure-10 A pie chart showing the extent to which the sample combined their visit to Japan with visits to other countries.

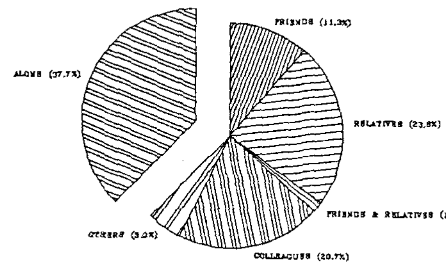


Figure-11 A pie chart showing the extent to which different types of group travelled together.

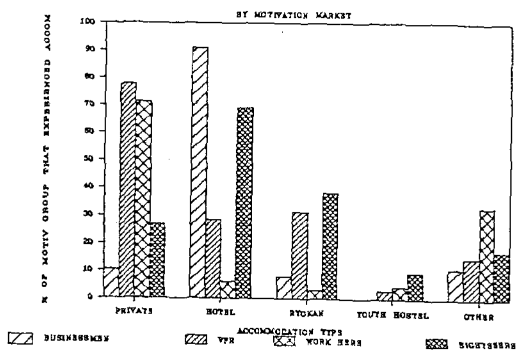


Figure-12 A comparison between motivation groups of the range of accommodation experienced.

Figure-13 Pred's Behavioural Matrix

	ABILITY TO USE INFORMATION			towards an optimal solution ------>
QUANTITY & QUALITY OF INFORMATION	B_{11} B_{21} B_{31}	B_{12} B_{22} B_{32}	B_{13} B_{23} B_{33}	B_{1n} B_{2n} B_{3n}
towards perfect knowledge	B_{n1}	B_{n2}	B_{n3}	B_{nn}

Source: Pred (1967), Behaviour and Location: Foundation for a Geographic and Dynamic Location Theory. Part 1.Lund: C.W.K. Gleerup.

Examining the results it can be seen that the information sources can be classified as either formal sources (i.e. official sources, printed material) or informal sources (i.e. verbal advice). Using this classification system, it is clear that the informal information sources are used more frequently and relied upon more heavily than the more formal sources of information. This may be explained by a lack of accessibility of the more formal sources such as the Tourist Information Centres, or perhaps it is due to a psychological bias towards the advice of friends or acquaintances rather than trusting an official or a government/commercial publication.

It is important to make the distinction between the use of information sources and the importance of those information sources. The relative merit of information sources cannot easily be pre-judged. So, whether or not an information source has been used is not necessarily an accurate indication of its usefulness. Important information sources are those which were relied on heavily throughout the trip and therefore ranked in the top three sources. It was hoped that a detailed understanding of information source preferences (that is, why some sources were considered more important than others) could be gained from the semantic evaluation of each source.

(2) CROSS ANALYSIS

a) Spatial Markets: Information source preferences do not vary significantly between the spatial markets. However the amount of information used by the respondents does differ spatially: The North American market being more information oriented than the Western European market (see Figure-15). This figure also shows that the Western Europeans seem to exhibit a stronger liking for the formal, official information sources than the North Americans who rely more on verbal advice from the less official sources. This is most strongly demonstrated when the figures for Guidebooks, Brochures and Tourist Information Centres are examined, as these are used significantly more by Western Europeans than by North Americans.

b) Motivation Markets: Figure-16 shows the different levels of use of important information sources by the four main motivational markets. Examining it closely one can see that different information sources are relied on by the different motivation groups. Taking the most common source "Advice from Japanese" as an example, the graph shows that three of the four Motivation groups rely heavily on this, while one, namely sightseers, does not. One possible explanation of this is that the first three groups all have pre-existing contact with Japanese people:

- Business travellers have business colleagues as Japanese contacts,
- Workers here have employers, students and neighbours,
- People visiting friends or relatives have either their hosts or their host's friends.

Sightseers, on the other hand, do not necessarily have any pre-existing ties with Japan and therefore do not have the opportunity to meet many Japanese people and get advice from them regarding the sightseers tour around Japan. This difficulty is probably heightened by the language barrier and the emphasis on the importance of being introduced in Japanese society.

This relative information lack experienced by sightseers is made up for by a heavier reliance on printed material (especially Guidebooks, but also brochures), information from hotels and verbal advice from home. Surprisingly little use is made of the Tourist Information Centres which are specifically aimed at the Sightseer, the traditional tourist.

8-3 AFTER SALES SERVICES

(1) AWARENESS AND USE OF AFTER SALES SERVICES

The JNTO provides or organises other services for foreign visitors besides information. Table-3 summarises the results pertaining to awareness and use of these services by the sample. It shows the percentage of the sample aware of the service, the percentage of the sample who used the service, and the percentage of those who were aware of the service and used it. Examining Table-3 it is clear that the Tax Free Shop service is the most well-known and most heavily used of the five. This can be ascribed to the fact that this is the only service with general appeal throughout the whole market - that is as well as appealing to pleasure travellers it is also a service which may be used by the business sector.

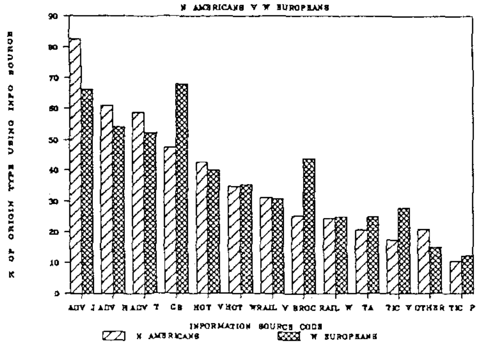


Figure-15 A comparison between the North American and West European markets of the extent to which information sources were used.

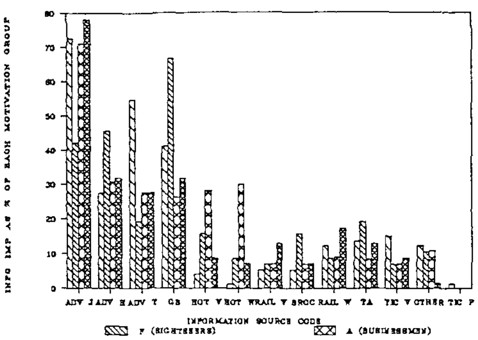


Figure-16 A comparison between motivation groups of the extent to which "important" information sources were used.

Table-3 Awareness and use levels of after sales services.

	AWARE	USED	USED AS % OF AWARE
1 HOME VISITS	47.6%	6.7%	14%
2 GOODWILL GUIDES	19.2%	3.6%	18%
3 INDUSTRIAL VISITS	16.3%	1.7%	10%
4 TAX FREE SHOPS	63.2%	26.2%	41%
5 JR RAILPASS	59.1%	11.8%	19%

(2) CROSS ANALYSIS

a) Spatial Markets: With respect to differences between the two main spatial markets of after sales service awareness levels, Figure-17 shows the Western European market to be more aware of most of the services than the North American market.

b) Motivation Markets: Figure-18 shows how the level of awareness of the five after sales services differs between motivation groups. As with information services, those working in Japan are most aware of the services available to them in most cases. Business travellers are least aware of the services analysed (apart from the Tax Free shop service) as most are aimed at pleasure travellers. In fact, when taking into consideration this idea of most of the services being aimed at the pleasure travel market it is surprising that these groups are not more aware of what is available to them.

Figure-19 illustrates the use level of each service as a percentage of each motivation group's level of awareness of the service. It shows that in all but the Industrial Visit service, sightseers make the most use of the services which they are aware of, closely followed by people working temporarily in Japan.

The Industrial Visit service is fairly unknown and little used by any of the market groups. It does not seem to be aimed at any specific market as business travellers rely on their hosts for opportunities to visit factories, and it is not heavily promoted in general.

The Home Visit Service has a very specific market, that is sightseers who wish to see the "real Japan" but do not otherwise have the opportunity to do so. Considering the specific nature of the market, over all awareness levels are high. Nevertheless the fact that nearly fifty per cent of the market which is specifically being aimed at are not aware of the service shows there is plenty of scope for improvement. The Home Visit Service could be promoted by

- Greater mention in Guidebooks and Brochures,
- Advertising in hotels
- More active promotion in the Tourist Information Centres (it is the authors experience that information is given regarding this service only if requested and therefore is useless to those unaware of the service.)

c) Japanese Ability: The level of Japanese ability affects the degree to which an individual is aware of after sales services. Figure-20 shows clearly how awareness of all five services increases significantly with Japanese Ability. This is one instance where Pred's concept of "ability to use information" as a parameter of "being informed" is well illustrated.

d) Information Sources: Figure21 shows that those who used the Tourist Information Centre were more likely to be aware of the available services. The only exception to this appears to be the Home Visit Service. This can perhaps be explained by confusion between the service provided by the government and other private services provided by hotels or travel agencies, as well as the reason stated above.

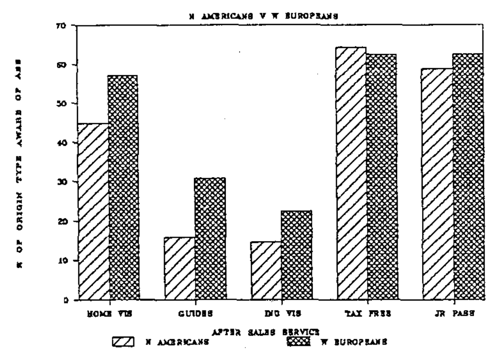


Figure-17 A comparison between the North American and West European markets of the extent to which they were aware of the after sales services.

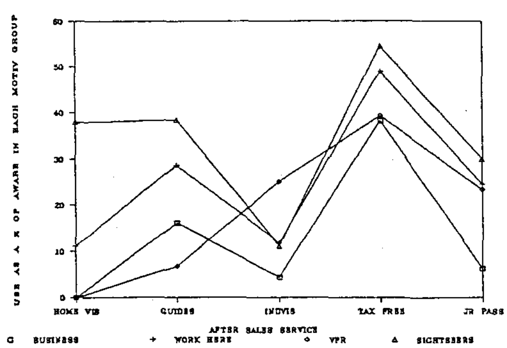


Figure-19 A comparison between motivation groups of the extent to which those aware of the after sales services actually made use of them.

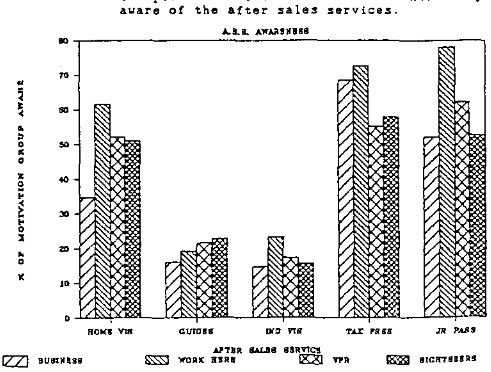


Figure-18 A comparison between motivation groups of the extent to which they were aware of the after sales services.

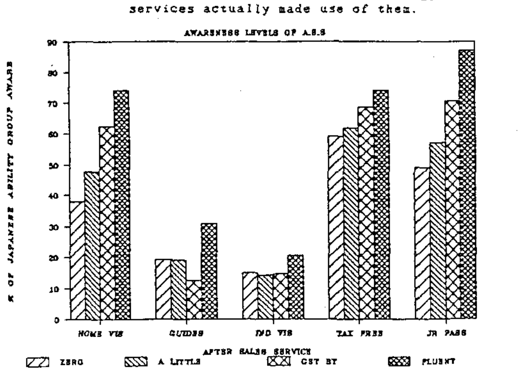


Figure-20 A comparison between Japanese ability groups of the extent to which they were aware of the after sales services.

e) Trip Duration: Cross analysing Awareness levels of the Services with Trip Duration (Figure-22) it can be seen that awareness increases with the time spent in Japan.

9. CONCLUDING REMARKS

The points raised in Chapter 5 and in the previous section, regarding information availability lead to the conclusion that while the official information sources do provide a good service, more effort has to be made to give visitors the opportunity to use these services by informing travellers of their existence. This could be done in a number of ways:

(1) Publicity in the main tourist generating countries through embassies (already done to some extent), and through the commercial enterprises (travel agents, tour operators) which arrange travel to Japan.

(2) Advertising on airlines (through in-flight magazines), and in airports where the visitors arrive.

(3) Advertising in hotels and at major transportation centres.

(4) Larger and clearer signs at the point of information distribution, since it is the authors experience that these places are not easy to find even when searching for them.

Once a better distribution of information is achieved, the level of after sales service awareness and use should increase. Visitors' problems related to language, travel, accommodation etc. will not be stopped but, at least visitors know that efforts are made to ease any complications. The results from the survey regarding the five after sales services covered was not sufficient to generate any main conclusions except that the awareness of services by visitors could be improved if more of the official information services were utilised.

One very important factor not yet mentioned is consumer preference. Information provision is a service like the other five services examined. Consumers can only be directed to those information services which will result in them being optimally informed. They cannot be forced to use them. Especially in the case of the tourism industry, the people being informed are either:

(1) On holiday - with the objective of enjoying themselves as much as possible. This, to many people does not involve waiting for half an hour or so at an information desk or trying to understand the directions of a railway employee. In fact, for some pleasure travellers it is the feeling of uncertainty and exploration which brings some of the enjoyment to a trip (classed as non-institutional travellers by Cohen (1972).

(2) On business - with the objective to be as efficient as possible. This does not involve being over-informed about irrelevant details regarding sightseeing.

Nevertheless tourists need information to some degree and should be given a choice of information services which allows them to follow their own preferences.

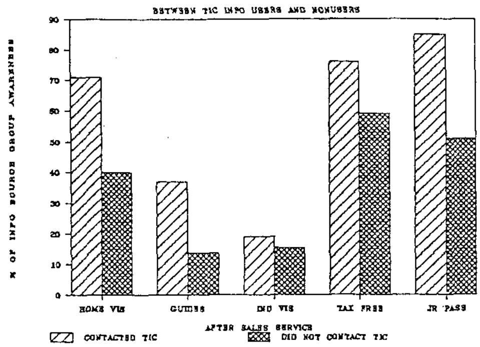


Figure-21 A comparison between users and non-users of the Tourist Information Centres of the extent to which they were aware of the after sales services.

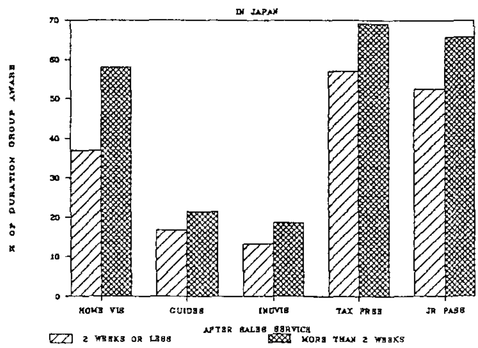


Figure-22 A comparison between long and short stay visitors to Japan of the extent to which they were aware of the after sales services.

The main conclusion of this report is that the distribution of promotional material needs to be improved (within Japan and overseas), rather than the actual material itself. This leads to a second conclusion: that the JNTO must evaluate how well their current information is reaching its targets before investing more time and money in new publications. Therefore, finance must be made available to ascertain which are the best methods of investing the limited resources available to the tourism industry.

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