

How to Attract Western Tourists for Okinawa -Baseline Examination-

March, 2013



Nansei Shoto
Industrial Advancement Center

How to Attract Western Tourists for Okinawa

-Baseline Examination-

I. Introduction

The year of 2013 has started with two major topics that give Okinawa greater chances to have more foreign visitors; the opening of new Ishigaki airport and the cabinet approval for building a second runway at Naha Airport. By enhancing the function of international air gateways, the Okinawan tourism industry would be able to accept more visitors in terms of its capacity, but the tourist businesses would have to be required to develop their strategies to attract possible customers. Especially, the passive strategies for the attraction of foreign tourists should be developed to aggressively expand Okinawa's tourism industry.

In 2012, the number of foreign visitors to Okinawa was 376 thousand people and about 80 percent of those visitors were from nearby Asian countries such as Taiwan, China, and Korea. Thanks to the tourist businesses' active promotions, the strong economic growth, and the rising international travel in those countries, the number of Asian visitors to Okinawa is expected to continuously increase over years. On the other hand, Okinawa just started to discuss measures to get the attention of people in Western countries. Now, Western countries seem to be potent markets for Okinawa to expand its business since many of those countries are economically stable, and people in those countries have a high frequency of overseas trips.

In the past, Okinawan tourism had focused on attracting domestic tourists. Therefore, there are some practical disadvantages for having foreign tourists, which arise from cultural, linguistic, or religious differences. Also, there must be some new tourism resources which have been undiscovered. To clarify the problems of those aspects, Okinawa should assess the current status of its tourism industry from the point of view of foreign visitors. When it comes to assessment of tourism status, there is still not enough information on Western markets to evaluate Okinawa's tourism resources and to develop a viable strategy for having Western tourists.

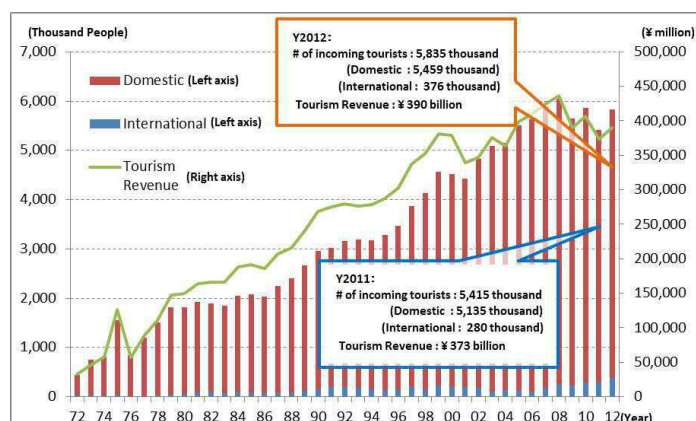
In the light of those circumstances, this research conducted an online survey targeting Western people who have visited Okinawa. Additionally, the interview collected and analyzed information from tour agencies and overseas offices of the Japan National Tourism Organization on tour packages and deals for European countries to Japan. On the basis of this information, this paper makes suggestions not only for local governments but also for local businesses to develop strategies to attract Western tourists.

II. Okinawa's Tourism Industry

1. Current State of Okinawa Tourism

Since Okinawa's reversion to Japanese administration in 1972, the tourism revenue has been increasing steadily as a key industry in the local economy. Today, to achieve its long term target of "10 million incoming tourists a year", Okinawa has strived to carry out policy measures developed under the "Visit Okinawa Plan" which gives body to "Okinawa Tourism Promotion Master Plan" (Okinawa Prefectural Government Department of Culture, Tourism and Sports [ODCTS], 2007). However, due to multiple negative impacts on tourism industry such as the recession after "Lehman Crisis" and the Great East Japan Earthquake, the number of visitors to Okinawa had grown at a sluggish pace and Okinawa's tourism revenue had been in a downward trend (ODCTS, 2012a). In 2012, Okinawa's tourism industry has begun to show the signs of recovery thanks to the rebound from the impact of the earthquake in previous year, the start of service of low-cost carriers, and the port call of the cruise ships from Asian countries (ODCTS, 2013a). As a result of the influence of such factors, the number of domestic tourists to Okinawa in 2012 was 5,459 thousand, and the number of international tourists was 376 thousand (ODCTS, 2013a), and the tourism revenue in the same year was 390 billion yen (ODCTS, 2013b). In 2013, Okinawa tourism has been positively affected by the events such as the opening of new Ishigaki airport, the increase in the number of flight from Korea and Taiwan to Naha, and the number of tourists, both domestic and international, has been increasing (ODCTS, 2013c). From this point forward, Okinawa will be required to implement measures more aggressively to attract more tourists, both domestic and international, to achieve the target of "10 million incoming tourists a year".

Fig. II -1-1. The Number of Incoming Tourists and Tourism Revenue (Okinawa)



* ODCTS (2012a) "Directory of Tourism 2011 (平成 23 年版観光要覧)", ODCTS (2013a), "Tourism Factsheet 2012 (平成 24 年入域観光客統計概況)"

In the past, Okinawa had attracted tourists mainly from the main island of Japan and some parts of Asia by its mild sub-tropical climate, beautiful and distinct natural landscapes, and unique "Ryukyu" culture. Despite its popularity as a tourist destination, Okinawa's international visibility falls woefully short of Hawaii, which is often cited as a comparison to Okinawa since those cities have some similarities in economic structure and tourist resources.

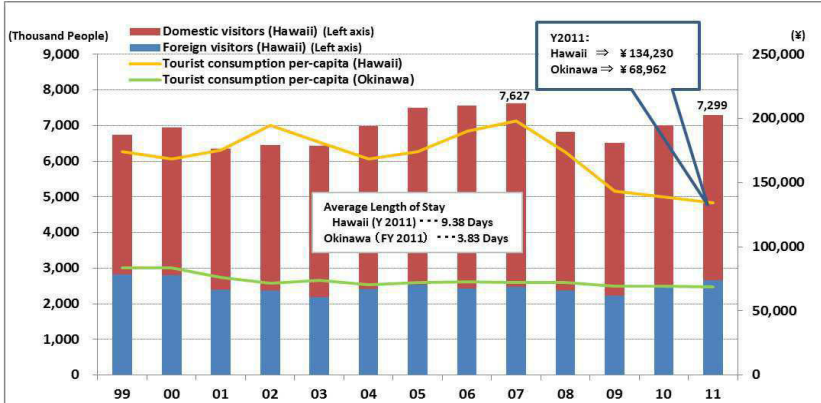
Regarding Hawaii, the number of visitors to the islands had been decreasing since its peak in 2007 of

7,627 thousand (State of Hawaii Department of Business, Economic Development & Tourism [HDBEDT], 2012). Although the number in 2011 remained at 7,299 thousand, it had 1,844 more visitors than Okinawa, had in the same year of 5,415 thousand (HDBEDT, 2012). Additionally, about 30 percent of the visitors to Hawaii were foreigners (HDBEDT, 2012) whereas only 5 percent of visitors to Okinawa were foreigners (ODCTS, 2012a). That is to say Hawaii’s tourism market is more diversified internationally than that of Okinawa.

Concerning the tourist consumption per-capita of Hawaii in 2011 was estimated to be 134,230 yen (HDBEDT, 2012), which exceeded the 68,962 yen of Okinawa (ODCTS, 2012a). As to the average length of stay, visitors to Hawaii spent 9.38 days (HDBEDT, 2012) and visitors to Okinawa spent 3.83 days (ODCTS, 2012a). This difference in the average length of stay between these regions might strongly affect the difference in the tourist consumption per-capita. Looking at the breakdown of the tourist consumption per-capita of these two regions, accommodation expenses occupied the largest part of consumption of both Hawaii and Okinawa; however, the average accommodation expense of Hawaii visitors was 51 thousand yen (HDBEDT, 2012) whereas that of Okinawa visitors was 19 thousand yen (ODCTS, 2012a). In regard to food & drink expenses, they occupied 21 percent of entire expenses of both Hawaii and Okinawa, and that of Hawaii was 27 thousand yen (HDBEDT, 2012) compared with that of Okinawa was 14 thousand yen (ODCTS, 2012a). These facts can be considered sufficient to explain the difference between Hawaii and Okinawa’s tourist consumption per-capita since the length of stay can affect the consumption of goods in a destination.

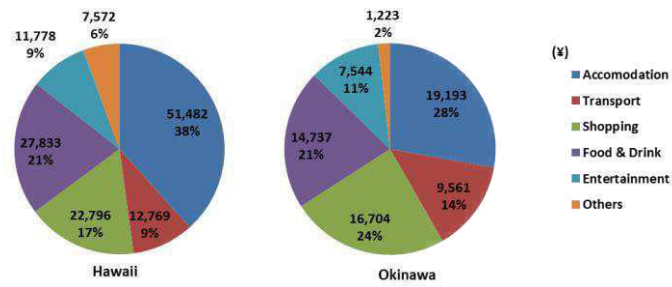
At this point, it is reaffirmed that there are three important key metrics for Okinawa to aim further development of tourism: increase in the number of incoming tourists, increase in the average length of visitors’ stay, and increase in the tourist consumption per-capita. To improve those metrics, all kinds of measures have been implemented under the cooperation between the public and private sectors. However, for the future, Okinawa is required to develop itself to a world-class resort destination and expand its target market from home and Asia to Western countries as it is referred to in “21st Century Vision of Okinawa”. Today, as a measure to attract foreign visitors, Okinawa has been engaged in the establishment of the Okinawa tourism brand, which enables Okinawa to grab international attention (Okinawa Prefectural Government Department of Planning, 2012).

Fig. II -1-2. The Number of Incoming Tourist and Tourist Consumption per-capita (Hawaii & Okinawa)



* ODCTS (2012a) “Directory of Tourism 2011 (平成 23 年版観光要覧)”, ODCTS (2013a), HDBEDT (2012) “Annual Visitor Research Report”, Japan Tariff Association (2012) “Weekly Market Data (週間為替相場主要 19 カ国)”

Fig. II -1-3. The Breakdown of the Tourist Consumption per-capita (Hawaii & Okinawa, 2011)



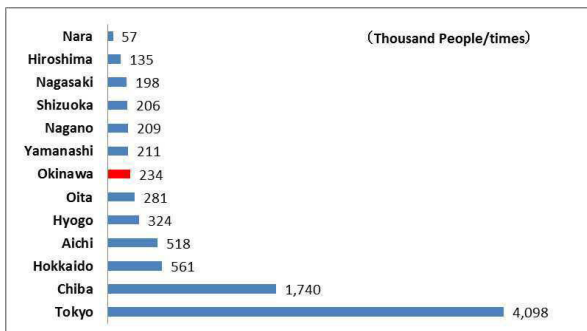
* ODCTS (2012a) “Directory of Tourism 2011 (平成 23 年版観光要覧)”, ODCTS (2013a), HDBEDT (2012) “Annual Visitor Research Report”

2. Current State of Inbound Tourism to Japan

According to Japan Tourism Agency ([JTA], 2013a), the most popular prefectures among foreign tourists in 2011 was Tokyo [4,098 thousand people/times], second was Chiba [1,740 thousand people/times], and third place was Hokkaido [561 thousand people/times]. The reasons of Tokyo’s popularity lie in the fact that Tokyo is the center of business and culture of Japan so people can experience “true Japan” as they imagine. Chiba has one of the most famous tourist facilities in Japan, Tokyo Disney Resort, and large scale of convention complexes. Furthermore, most of those facilities are conveniently located in terms of public transportation. The same survey reported that the number of foreign visitors to Okinawa was 234 thousand people/times (JTA, 2013a). Although Okinawa was seventh popular prefecture in Japan, the number was less than one out of seventeen of Tokyo, and was less than one-half of Hokkaido (JTA, 2013a). Regarding the total foreign tourist consumption in Japan, 313,011 million yen in Tokyo was the best by far, second was 69,699 million yen in Hokkaido, third was 62,105 million yen in Chiba, and Okinawa was seventh, with 14,049 million yen in 2011 (JTA, 2013a).

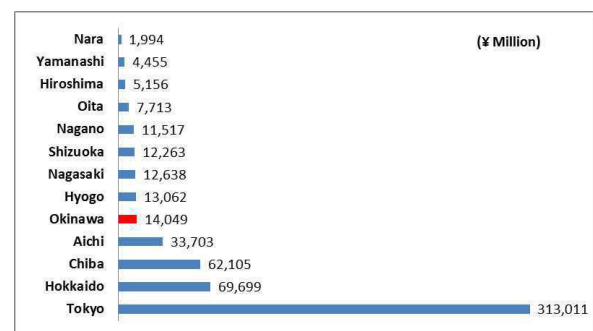
For your reference, JTA’s statistic data is based on its own scale, which was established in 2009 for the purpose of measuring all prefectures’ data by a uniform criterion (JTA, 2013a). Some prefectures already had their own scale before JTA’s standard and still use their own scales, therefore, careful attention should be paid to the possibility of having same titles but different tourism data in Japan.

Fig. II -2-1. The Number of Foreign Tourist (Major Cities)



* JTA(2013a) “Tourism Statistics 2011” (共通基準による観光入込客統計)”

Fig. II -2-2. The Total Foreign Tourist Consumption (Major Cities)

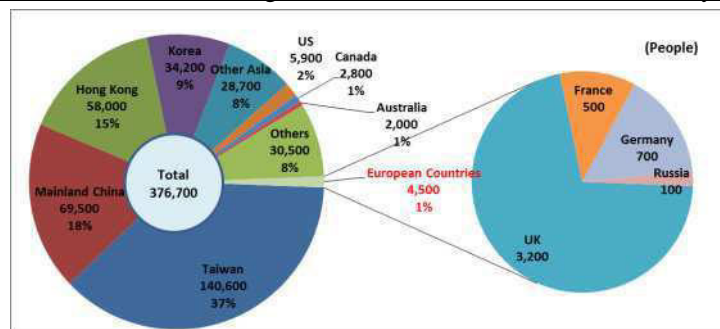


* JTA(2013a) “Tourism Statistics 2011” (共通基準による観光入込客統計)”

Looking at the number of foreign visitors to Okinawa in 2012 country by country, the most in number was Taiwan [140,600 people], second place was mainland China [69,500 people], third place was Hong Kong [58,000 people], and fourth place was Korea [34,200 people] (ODCTS, 2013d). The visitors from those neighboring Asian regions occupied about 80 percent of all foreign visitors to Okinawa, and the visitors from the other countries include the US, Canada, UK, Germany, and France was less than 10 percent (ODCTS, 2013d).

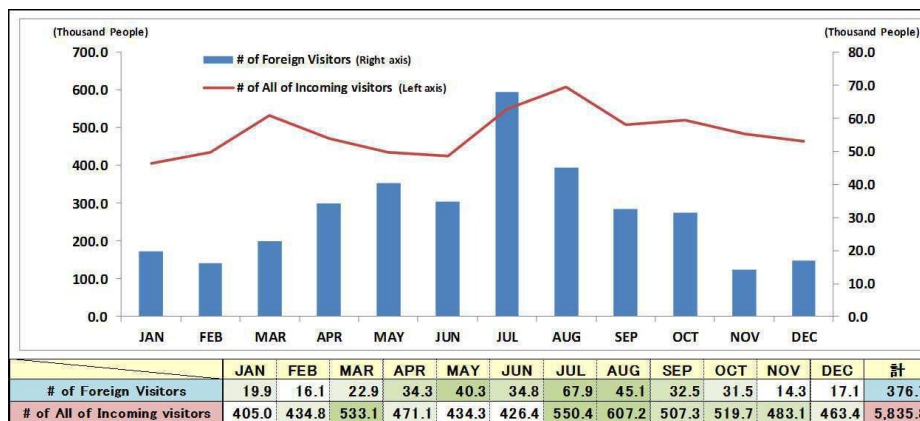
In regards to incoming visitors, both domestic and international, to Okinawa in 2012 peaked in March, July, and August (ODCTS, 2013a). It can be assumed that the number of visitors to Okinawa was affected by students' holiday such as spring break and summer vacation. On the other hand, the visitor rate bottomed out in January, May, and June (ODCTS, 2013a). The reason for decrease in the number of visitors could be related to people's homecoming visit, and "Baiu/Tsuyu (rainy season)" in Okinawa. As to foreign visitors, the peaks were recorded in May, July, and August, and the lows were recorded in February, November, and December (ODCTS, 2013a). It seems that tours to Okinawa are in great demand in summertime.

Fig. II -2-3. The Number of Foreign Tourist to Okinawa in 2012 (Country by country)



* ODCTS (2013d) "The Number of Foreign Tourist Country by Country (2012) "国籍別入域観光客数(平成 24 年) "

Fig. II -2-4. The Number of Tourist to Okinawa in 2012 (Month by Month)



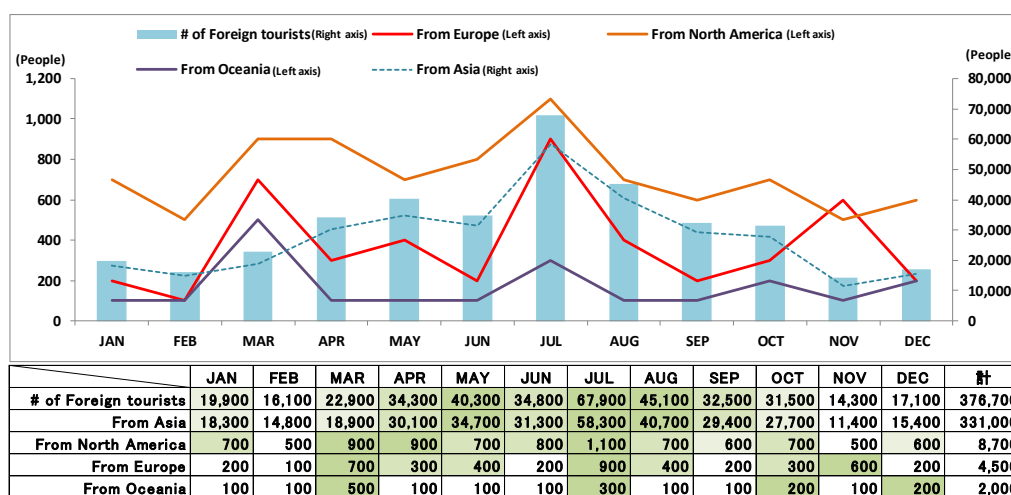
*OSCTS (2013a) "Tourism Factsheet 2012 (平成 24 年入域観光客統計概況)"

Taking a closer look at the number of foreign visitors to Okinawa, the visitors from neighboring Asian countries, which occupied a great part of the total number, had a decisive influence on the change in the number of foreign visitors (ODCTS, 2013a). The peaks of incoming visitors from North America were recorded in March, April, and July, and lows were recorded in February and November (ODCTS, 2013a). From European countries, peaks were in March, July, and November, and lows were in February, June, and

December (ODCTS, 2013a). From Oceania including Australia, the obvious peak was recorded in March, and other months subsequently remained at low levels (ODCTS, 2013a).

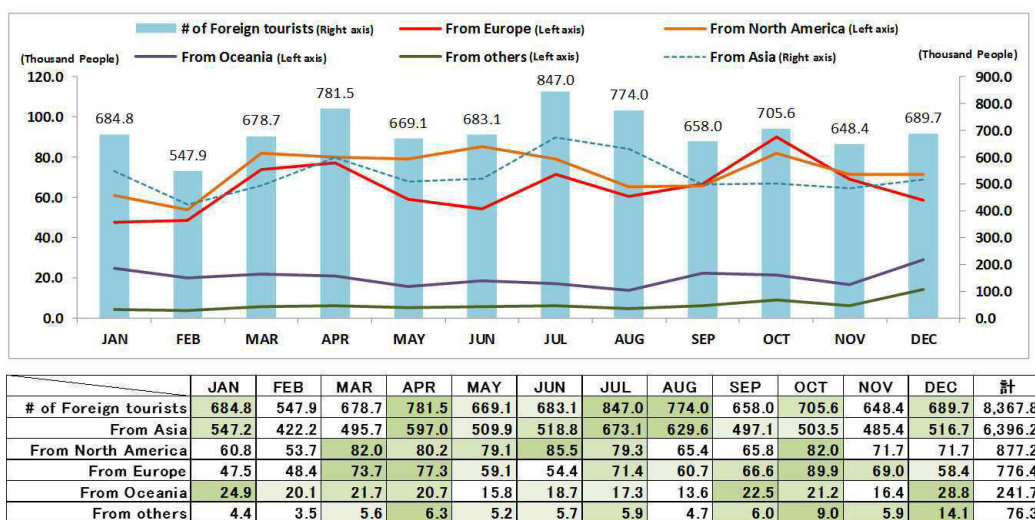
As to the number of visitors to Japan, peaks were recorded in April, July, and August, and lows were in February, September, and November (Japan National Tourism Organization [JNTO], 2013a). Specifically, the visitors from North America's peaks were in March, April, June, and October, and lows were in January, February, August, and September (JNTO, 2013a). This trend seems to correspond with the change in the number of visitors from North America to Okinawa. On the other hand, visitors to Japan from European countries' peaks were in March, April, and October, and lows were in January, February, and June (JNTO, 2013a). The trend of European visitors to Japan was different from that to Okinawa. The trend of visitors from Oceania had peaks in January, September, and December, and lows in May, August, and November (JNTO, 2013a). The trend of Oceania visitors to Japan was also different from that to Okinawa.

Fig. II -2-5. The Number of Foreign Tourist to Okinawa in 2012 (Month by Month)



*OSCTS (2013a)“Tourism Factsheet 2012 (平成 24 年入域観光客統計概況)”

Fig. II -2-6. The Number of Foreign Tourist to Japan in 2012 (Month by Month)



*JNTO (2013a)“Trend in International Visitors (訪日外客の動向)”

The high tourist season for other Asian countries to Japan seems to be strongly affected by the timing of

vacations and the promotional activities by tourism businesses such as air carriers. In terms of the timing of vacation, every April there is the “Pure Brightness Festival” in areas of the Chinese world, and many Asian people take a vacation to spend time with family members (China Today, 2011). July and August is during summer vacation season like other countries. It can be assumed that many Asian people are able to make plans for their trips in these months. Regarding tourism promotions, “Open Skies” has been playing an important role in the international tourism. Open skies is a bilateral air transport agreement which authorizes air carriers to make decisions about arrival and departure slots, airline routes, number of services, etc. between two nations. Today, the Japanese government has concluded the bilateral agreements with 23 nations which include Taiwan, Korea, and Hong Kong (Jiji Press, 2013). These agreements let air carriers increase the number of flights to Okinawa, in turn leading those businesses to start to promote tours to Okinawa. Among air carriers in those nations, especially Taiwanese carriers often have promotional activities related to Okinawa. In Taiwan, there is a unique business model; most air carriers retain tour agencies and those tour agencies conduct sales air tickets and travel-related services (Hyodo & Oikawa, 2012). This system allows air carriers to sell effectively, however, tour agencies have a need to sell out tickets, which are allocated by the parent companies (Hyodo & Oikawa, 2012). Therefore, those agencies sometimes have to practice campaigns and sell tickets at a low price (Hyodo & Oikawa, 2012). These promotions also may have an impact on the number of visitors to Okinawa.

On the subject of Western countries, UK, Germany, France, US, Canada, and Australia send many tourists off to Japan every year. In 2010, the group of visitors from the US was the greatest number with 727 thousand people, followed by Australia [225 thousand], UK [184 thousand], Canada [153 thousand], France [151 thousand], and Germany [124 thousand] (JTA, 2011). Among those visitors from Western countries, 50 to 60 percent of them visit Japan for business purposes (JTA, 2013b). On the other hand, the large part of visitors from Korea, Taiwan, and Hong Kong visit Japan for sightseeing purposes (JTA, 2013b). When it comes to visitors to Okinawa, even the largest number of visitors was 11 thousand people from the US, and the second was 5 thousand from the UK (JTA, 2013b). In addition, most of the visitors to Okinawa from the US are business travelers or relatives/friends of servicemen (JNTO, 2012). These results show that the visibility of Japan, especially Okinawa, as a tourist destination among Western countries is low.

Although Western visitors to Japan are less than 20 percent (JTA, 2013b), a large majority of the population from these countries travel abroad regularly. Specifically, Germany had 85,900 outbound travelers in 2010 whereas its population was 81,575 thousand (OECD, 2012). It seems that the “overseas trip” is widespread in some Western countries. However, the number of visitors from these nations to Japan has continued be at the lowest levels. From these results, it can’t be ignored that Okinawa’s visibility is low in those countries.

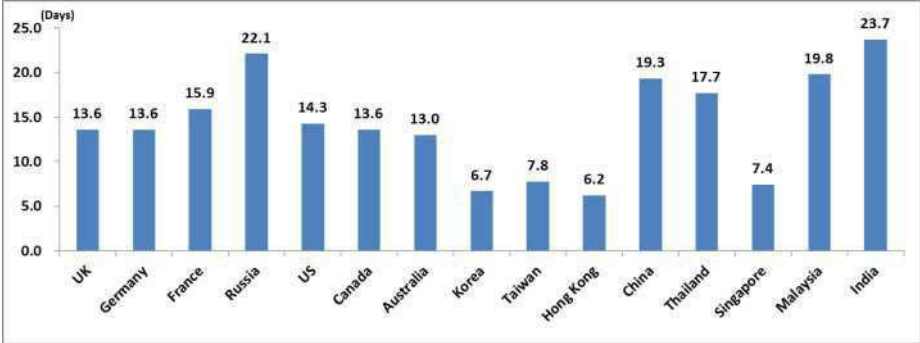
Table. II -2-1. The Number of Tourist to Japan and Okinawa (Major Nations, 2010)

	(Tousand People)					
	UK	Germany	France	US	Canada	Australia
Population	62,262	81,757	64,824	309,774	34,126	22,446
# of Overseas Travelers	55,562	85,900	25,000	60,271	28,680	7,111
# of Travelers to Japan	184	124	151	727	153	225
# of Travelers to Okinawa	5.5	1.5	0.8	11.1	4.0	2.3

*OECD(2012) “Tourism Trends and Policies 2012”, JTA(2011) Consumption Trend of International Visitors (訪日外国人消費動向調査 平成 23 年年次報告書), ODCTS (2012b) “Directory of Tourism 2012 (平成 23 年版観光要覧)”

As they are shown above, not only Okinawa but Japan’s visibility as a tourist destination in Western countries is low, and Japan and Okinawa’s tourism industries heavily depend on neighboring Asian countries such as Korea, China, and Taiwan. It is reasonable that Japan and Okinawa have those situations because of their geographical proximity to between Asian countries. However, the fact remains that those specific Asian markets are more susceptible to political frictions than by other markets. From the point of view of marketing, concentrated investments are important to achieve high financial efficiencies, but it is also true that investors have to accept huge risk since they can’t diversify the risk in preparation for failed investment. Especially, in international business situations, investors have to consider the risks of political and cultural frictions; therefore, the importance of diversification of markets is significant. In fact, the number of visitors from those Asian countries is decreasing because of some political issues between those countries and Japan. So it is safe to say that tourism industry of Japan (including Okinawa) should look at other markets more than ever. Considering each countries’ political stability, economic standard, internationalization of people shown in frequency of overseas travel and things, and historic data of the number of tourist to Japan, the Western market is appropriate as the target market which Japan (and Okinawa) should aim for. Especially, as to countries, which have many people who often go overseas travel and stay for a lengthy period of time such as UK and Germany, if Japan (and Okinawa) can shift some part of those international travelers’ destinations to Japan (and Okinawa), tourism businesses in Japan (and Okinawa) can expect substantial number of visitors.

Fig. II -2-7. The Average Length of Stay in Japan (2012)



*JTA(2013b) “Consumption Trend of International Visitors” (訪日外国人消費動向調査 平成 24 年年次報告書)

3. Measures to Attract Foreign Visitors

a) Measures to Attract Foreign Visitors by Japanese Government

The recent tourism related activities by Japanese government originated from “Visit Japan Campaign” which was launched in 2003, and under the campaign, Japanese government, local governments, and private sectors have deployed various efforts to increase foreign visitors to Japan (JTA, 2013c). In 2006, “Basic Act for Promoting a Tourism-Oriented Country” has enacted for the purpose of realization of tourism-oriented country (Ministry of Internal Affairs and communications, 2006). In addition, to build the structure for attainment of tourism-oriented country, Japan Tourism Agency has been established in 2008 (JTA, 2012a). Under the JTA’s administration, “Basic Plan for Promoting a Tourism-Oriented Country” has been developed and set national goals of increasing the number of foreign tourists to 18 million and doubling the number of international conferences in Japan by 2016 (JTA, 2012b).

To date, JTA and its related organizations have implemented advertising campaigns, inviting tourism media, and other measures in five major markets, Korea, China, Taiwan, US, and Hong Kong, and also implemented measures for local markets such as cooperative advertising with local tour agencies, inviting local tour agencies to Japan, and holding travel fairs in thirteen prioritized markets, Australia, Thailand, UK, Singapore, Canada, France, Germany, Malaysia, and five major markets which were mentioned above (JTA, 2013c). As measures for the tourist destinations in Japan, the product developments and cooperative advertising with local governments have been conducted (JTA, 2013c). JTA continues to be actively involved in the improvement of the legal systems such as easing visa regulations and reducing the time of immigration clearance, the preparations to receive foreign visitors such as improvement of Wi-Fi environment and increase ATMs which can accept cards that are issued outside of Japan, and the establishment of cross-sector tourism businesses among cultures, food, clothing, and others (JTA, 2013c).

b) Measures to Attract Foreign Visitors by Local Government of Okinawa

Okinawa has set a goal of increasing the number of incoming tourists to 10 million and 2 million foreign tourists among them by 2022 under the “The Fifth Long-term Tourism Promotion Plan” which was issued in 2012 (ODCTS, 2012c). Also, it has set a goal of increasing tourists from European countries to 30 thousand within a couple of years from 2012 (ODCTS, 2013e). In the past, the measures for attracting foreign visitors to Okinawa were mainly targeting Asian markets, specifically, the Chinese world; for example, there were intense advertising in Taiwan, Beijing, Shanghai, Hon Kong, and Korea, and promoting the introduction of “China Union Pay” cards which are mostly used by Chinese (Nagao, 2012). Moreover, as a measure which holds great expectation, there is the issuance of a multi-entry visa which is a type of visa that allows the holder to enter and leave the country multiple times within a given period of time as long as those holders visit to Okinawa first (Nikkei, 2012). Practically, only rich Chinese can get the visa since there are some conditions related to income. In tune with these trends, air careers, tour agencies, and other tourism industry related businesses in Japan and East Asia has activated efforts to enter the market in Okinawa.

Today, some measures for attracting foreigners have conducted. For example, the call center, which provides tourism information to foreign travelers in English, Chinese, and Korean on a round-the-clock basis, has been established (Okinawa Convention & Visitors Bureau [OCVB], 2013a). Also, Okinawa prefecture expanded information and communications services by improving Wi-Fi environment (OCVB, 2013b). Besides, the prefecture announced its tourism brand “Be Okinawa” which aims for getting attention from all over the world (ODCTS, 2013f). Under the brand, Okinawa focuses on “Premium FIT (Frequent Individual Tourist)”, who go out for oversea travel privately at least once a year and stay upper intermediate hotels (ODCTS, 2013f). As measures focus on the Western market, Okinawa started to run a booth at travel fares in those countries and to invite travel magazine writers to Okinawa (ODCTS, 2013e). However, these are not enough to triple the number of European visitors to Okinawa, therefore Okinawa should strengthen its countermeasures to attract people from those countries.

III. Current Situation Survey of Foreign Tourists in Okinawa

1. Questionnaire Study of Foreign Tourists in Okinawa

With the goal of seeing a picture of Okinawa tourism from the Western people's perspective, the questionnaire study focused on Westerners who have visited to Okinawa was conducted.

a) Study Object

109 questionnaire results of Western people who have visited to Okinawa were collected and 77 results of them were valid responses.

b) Survey Method

Web-based research. Asked for cooperation through SNS, websites related to Okinawa tourism for foreigners, restaurants and bars in Okinawa. The surveillance period was from August 2012 to October 2012 (three months). Survey slips were prepared in four languages: English, Spanish, German, and French.

c) Survey Content

Age, nationality, number of times of travel experience to Japan and Okinawa, means of information-gathering about Okinawa, the length of stay in Okinawa, places visited in Okinawa, satisfaction level of accommodation, natural environment, tourism resources, etc. of Okinawa. (41 questions) The annual survey on foreign tourists in Okinawa that was conducted by Okinawa Prefecture was referred.

d) Findings

On the basis of respondents' age, 23 percent of the respondents were 20s, 27 percent were 30s, 33 percent were 40s, and 12 percent were 50s. This result shows that visitors to Okinawa represented a variety of ages, but comparatively people in old age were few. On the basis of gender, 66 percent were male and 34 percent were female.

To look at the numbers of visitors by nationality, US citizens make up the largest portion of visitors to Okinawa. 34 percent of respondents were American, 19 percent were Germany, and 10 percent of them replied they were from UK, 8 percent were Canadian, and another 8 percent replied they are French. Since Okinawa has US military bases, many of businesspersons to the bases and family members and friends/acquaintances of servicemen are coming in to Okinawa. It must be the reason of having many American visitors to Okinawa.

As to frequency of overseas travel, 43 percent answered "Once in a couple of years", 38% replied "a few times in a year". Thus, people visit to Okinawa can be assumed to be frequent international travelers. 64 percent of respondents' answered their economic status as "Working" and 14 percent of them answered "House maker". Then 5 percent replied as "Retired" and another 5 percent were "Student". From this result, it is presumed that there is a linkage between decision-making about Okinawa trip and income.

Fig. III-1-1. Age

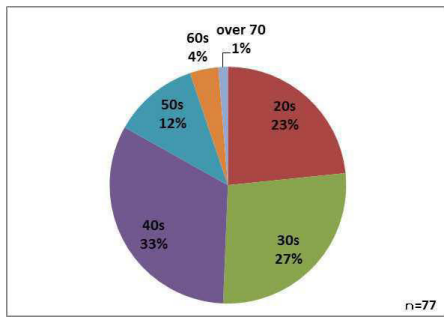


Fig. III-1-2. Gender

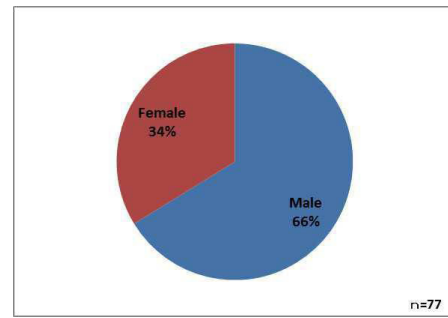


Fig. III-1-3. Nationality

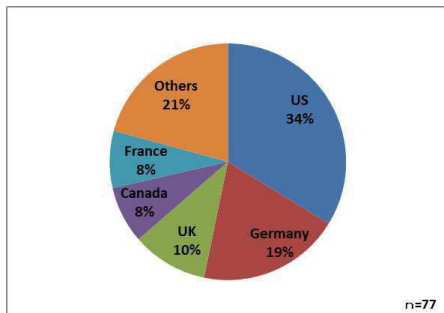


Fig. III-1-4. Frequency of Oversea Travel

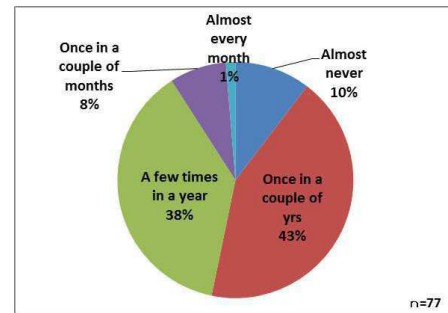
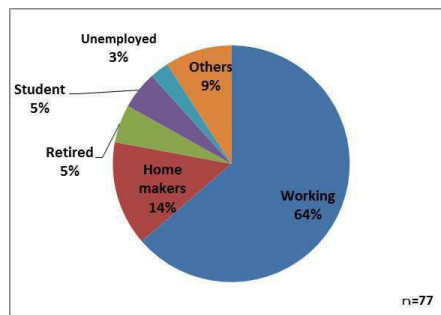


Fig. III-1-5. Economic Status



To the question of travel experience to Japan, 21 percent said it was “First time”. Second most answer was “3-5 times” [26 percent], and third was “2 times” [23 percent]. Also, there were people who have been to Japan “More than 11 times” [20 percent]. Those people, who have visited to Japan many times, could be businesspersons or people who have relatives or friends in Japan. Regarding the question of travel experience to Okinawa, the most answer was 27 percent of “First time”, followed by 30 percent of “2 times”, 22 percent of “3-5 times”, and 13 percent of “More than 11 times”. In this research, there were many frequent Okinawa visitors. As a reason of the result, since many of the respondents’ purpose to visit Okinawa was “Study (Karate/Kobudo)”, there could be many people who visit to Okinawa multiple times for Karate trainings.

Concerning the number of people in the travel group, the respondents replied “1” if it was solo trip. If the respondents had one companion, then they would answer “2”. As are result of the question, 25 percent were “1 (by him/herself), 31 percent were “2”. Although individual or small group travel occupied large part of the respondents, there were 23 percent of “More than 6”. Again, most of them answered their purpose of trip were “Study (Karate/Kobudo)”. As to relationship with/to travel companions, the most answer was 36 people of “Friends”, followed by 17 of “Family” and 15 of “Spouse/Partner”.

Fig. III-1-6. Travel Experience to Japan

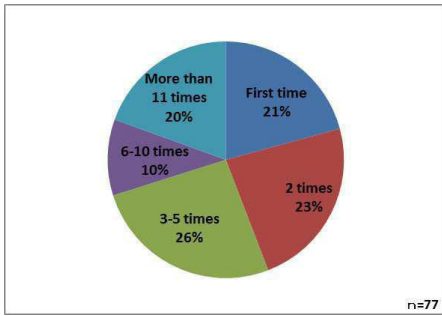


Fig. III-1-7. Travel Experience to Okinawa

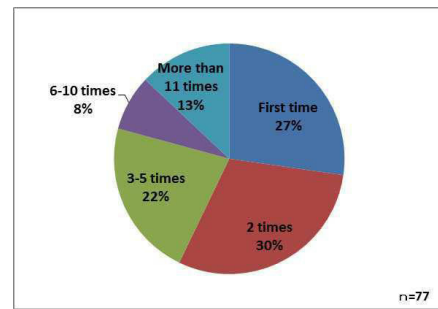


Fig. III-1-8. The Number of people in Your Travel Group

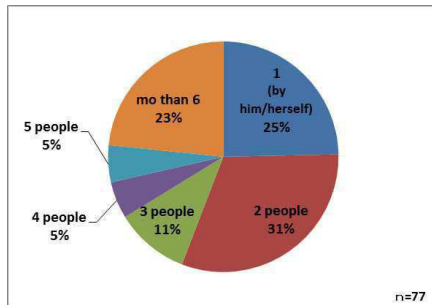
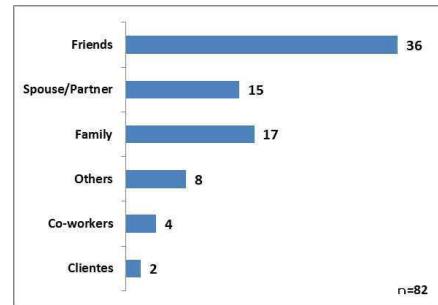


Fig. III-1-9. Relationship with/to the Members



Almost all of the Western visitors [98 percent] to Okinawa used public airplanes as the means of transportation. Some visitors from neighboring Asian countries use cruise ships, and the number of ship from those countries calling at Okinawa has been increasing. On the other hand, it is quite unlikely to be able to have cruise ships directly from Western countries due to Okinawa’s geographical location.

As to the airports that were used for transfer before getting to Okinawa, Narita International Airport was the most popular airport [25 people], then Haneda as “Tokyo International Airport” was second [15 people]. The people who used “Kansai International Airport” [5 people] were fewer than the people who used “Taiwan Taoyuan International Airport” [8 people]. The results of next question about the transfer airports visitors used after leaving Okinawa was almost same rank order. The results of transfer airports must be affected by the number of international routes, which those airports have. To be more specific, Narita International Airport had 81 flights to Europe, 115 flights to North America, and 18 flights to Oceania (TISCO JAPAN, 2013). On the other hand, Kansai International Airport had only 18 fights to Europe, 30 flights to North America, and 18 flights to Oceania (New Kansai International Airport Company, 2013). Regarding Taiwan Taoyuan International Airport, there were 6 daily flights between Naha International Airport (Naha Airport Building, 2013) .

Fig. III-1-10. Means of Transportation to Travel to Okinawa

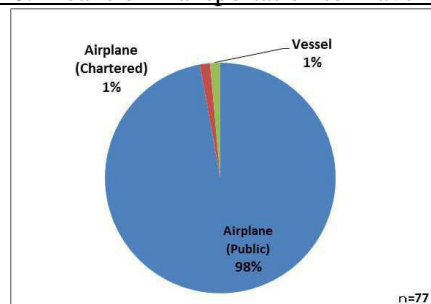


Fig. III-1-11. Transfer Airport Used Before Coming to Okinawa

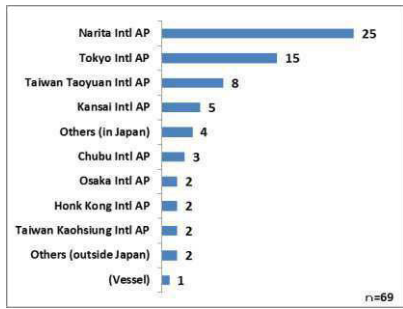
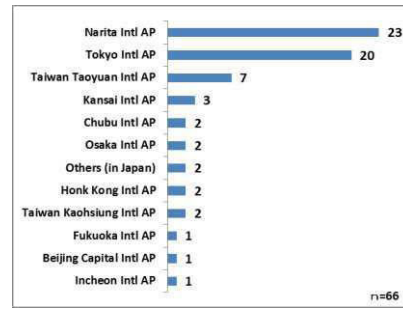


Fig. III-1-11. Transfer Airport Used After Leaving Okinawa



On the basis of the cities people visited besides Okinawa, the most popular city was 42 people of Tokyo, followed by 20 of Osaka, 19 of Kyoto/Nara, 17 of “Around Kanto”, 14 of “Around Osaka”, and 12 of “Around Nagoya”. Since TOKYO is a key of sightseeing, business, and transportation, the city is very popular among foreign visitors along with Osaka, Kyoto, and Nara as the cities in Golden Route. Also, it is assumed that many of visitors to Okinawa actually didn’t focus only on Okinawa as their travel destinations and chose Okinawa as a part of tour to Japan. 10 respondents answered that they went some other cities outside of Japan.

Fig. III-1-13. Other Cities in Japan You Visited on This Trip

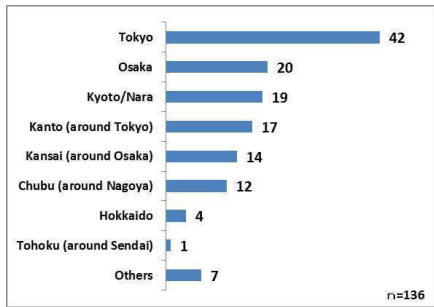


Table. III-1-1. Other Cities Outside of Japan You Visited on This Trip

Other Cities You Visited on This Trip (Outside of Japan)
• Hong Kong, Australia, Qatar, European countries
• Seoul
• Manila
• Hong Kong, Seoul
• Thailand
• Taiwan
• China
• Hawaii
• Italy
• Dubai

As to duration of the trip to Japan, 41 percent of respondents answered “15-30 days”, 33 percent of them answered “7-14 days”, and 24 percent of them answered “More than 2 months”. In Okinawa, 47 percent of respondents spent “7-14 days”, 20 percent spent “15-30 days”, 13 percent stayed 4-6 days, and 18 percent stayed “More than 2 months”. As it was mentioned above, the number of visitors whose purpose to visit Japan must have been affected by this result.

Fig. III-1-14. Duration of the Trip (Total)

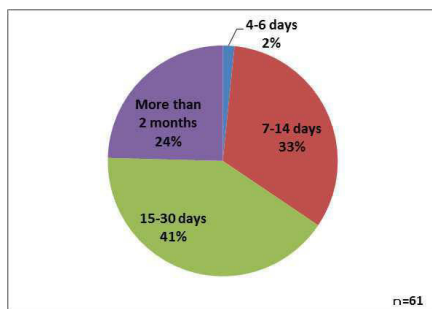
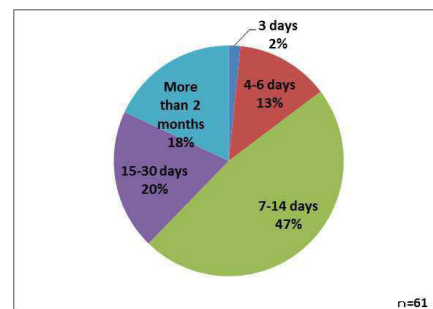


Fig. III-1-15. Duration of the Trip (in Okinawa)



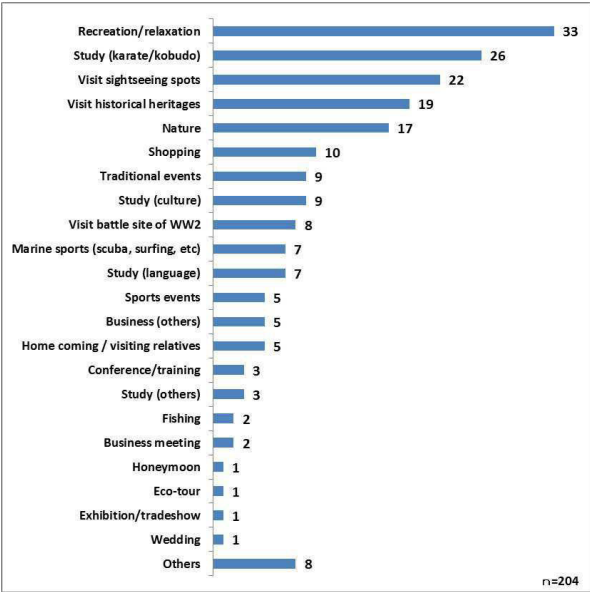
Regarding the islands in Okinawa people visited, the most answer was 49 people of “Main Island”, followed by 11 of “Miyako Island” and “Zamami/Aka Island”. “Tokashiki Island” [10 people] was more popular than “Ishigaki Island” [7 people]. One of the reasons of high popularity of Kerama Islands, which include Zamami, Aka, and Tokashiki, is considered that the world most famous travel book “Lonely Planet” introduces Kerama Islands as “the most attractive islands in the entire Southwest islands with crystal clear water and excellent white sand beaches” (Rowthorn et al., 2011).

Fig. III-1-16. Islands You Visited in Okinawa



As the purposes of the trip, 33 respondents answered “Recreation and relaxation”, 26 answered “Study (karate/kobudo)”, 22 answered, “Visit sightseeing spots”, 19 answered, “Visit historical heritages”, and 17 answered “Nature”. The annual survey on foreign tourists in 2011 which conducted by Okinawa prefecture also included a similar question, and its American respondents’ top five answer were “Home coming/visiting relatives”, “Visit sightseeing spots”, “Business,” “Recreation and relaxation,” and “Event” (ODCTS, 2012d). These two surveys have slightly different alternatives, but results were almost close. “Study (karate/kobudo)” got second place. The result might be related to quadrennial karate event, “Goju-ryu World Budosai” which was taken place in July 2012 in Okinawa. According to the organizer of the event, they had about 700 participants from 42 nations (International Okinawan Goju-ryu karatedo Federation, 2012).

Fig. III-1-17. The Purpose of the Trip



In terms of the means of collecting information on Okinawa before visiting, most people answered “Internet”, second place was 38 with “Friends/acquaintances”, and third was “Travel books”. According to Okinawa prefecture, the result of their survey showed that most useful information resource for American visitors were “Friends/acquaintances”, “Internet” and “Accommodation staff”, and for other visitors including some European were “Free papers”, “Accommodation staff”, and “Tourist information center at the airport” (ODCTS, 2012d). Among the alternatives of Okinawa prefecture’s questionnaire, “Local people” was not included as information resources whereas it was included in this survey. However, according to this survey result, the Westerners seem to try to communicate local Okinawan across a language barrier, and they are able to get information from those locals.

Fig. III-1-18. Means of Information Collection on Okinawa Before Visiting

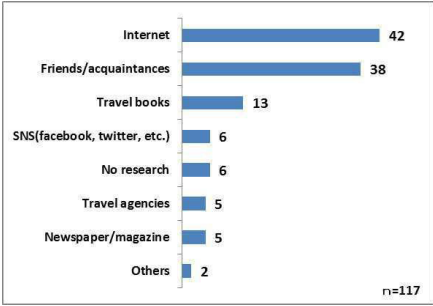
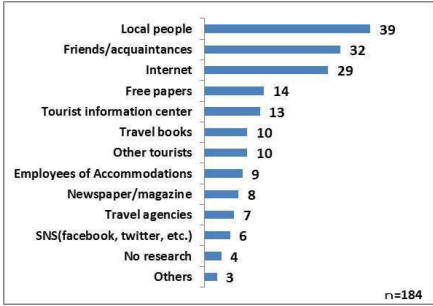


Fig. III-1-19. Means of Information Collection on Okinawa During Stay



Considering accommodations in Okinawa, “Hotel” [36 people] was the most popular place to stay. In a second, “Private house” [22 people] was chosen, and the third was “Hostel” [12 people]. About “Private house”, there could be at least two cases: staying at friends/acquaintances’ place, and weekly or monthly apartments for long stay travelers. With respect to the third most answer “Hostel”, the westerners seem to be more likely to stay these types of accommodations compare to Japanese.

As for transportation, 39 of the Western visitors used “Monorail”, then 34 of them used “Taxi”, 23 of them used “Rental car”, and 17 of them used “Boat/ferry”. The most popular transportation “Monorails” only run in the part of Naha city and the second most “Taxies” cost a lot for long distance travel. Therefore, many of the Western travelers also must have used “City bus”, “Rental car” or friend/acquaintance’s cars for their trip. In Okinawa, foreign travelers have to have international driver’s licenses to use rental cars. That could be a reason that some respondents didn’t use rental cars even those cars are very convenient for Okinawa trip.

Fig. III-1-20. Type of Accommodations You Stayed in

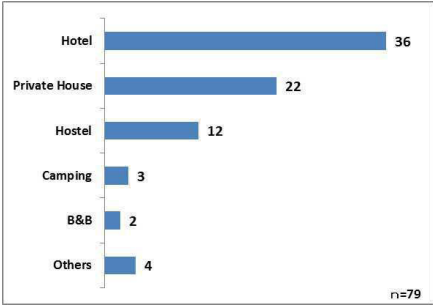
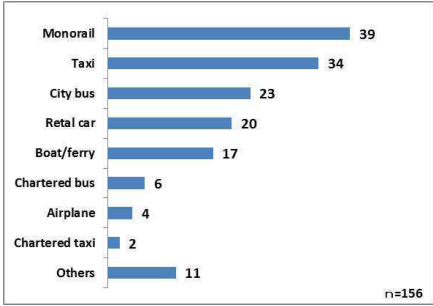
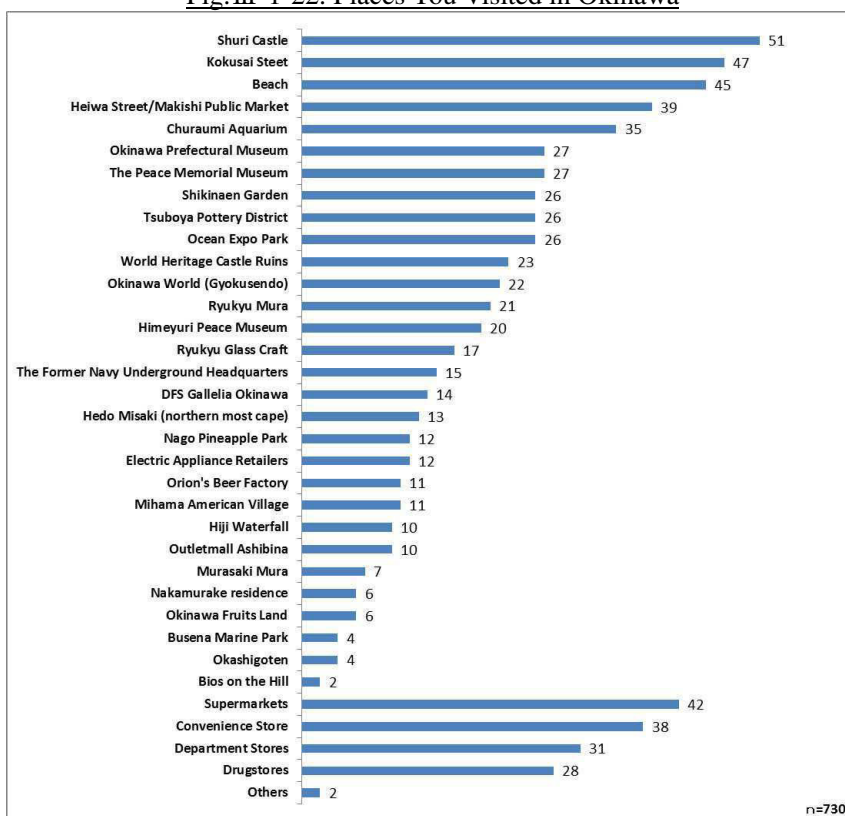


Fig. III-1-21. Means of Transportation You Used



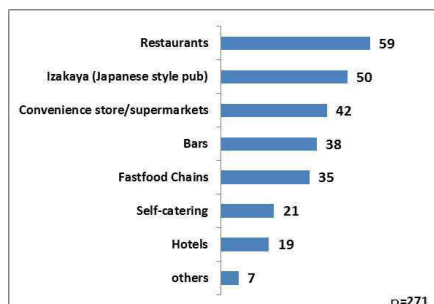
Regarding popular places respondents visited in Okinawa, the most answer was 51 people of “Shuri Castle” followed by 47 of “Kokusai Street”, 45 of “Beach”, 39 of “Heiwa Street/Makishi Public Market”, and 35 of “Churaumi Aquarium”. According to Okinawa Prefecture, Asian tourists tend to visit “Ocean Expo Park (incl. Churaumi Aquarium)”, “Shuri Castle”, “Nago Pineapple park”, “Okinawa world (Gyokusendo)”, and “Natural Tourist Destination” (ODCTS, 2012d). Compared to Asian, Westerners tend to enjoy “Beach” and “Heiwa Street/Makishi Public Market”.

Fig. III-1-22. Places You Visited in Okinawa



As places visited for eating, “restaurant” [59 people] was the most popular place. Secondly, 50 of “Izakaya (Japanese style pub)” and thirdly, 42 of “Convenience stores/supermarket” were popular. Also, there were people who answered “Bars” [38 people], “Fast-food Chains” [35 people] or “Self-catering” [21 people]. It can be assumed that Westerners can choose places for eating without any demur depending on circumstances.

Fig. III-1-23. Places you Visited for Eating During the Stay



From the survey asking the “Top five things you expected from Okinawa” the respondents answered: “Interaction with local people” [42 people], “Beautiful beaches and oceans” [40 people], “Good food” [39 people], “Unique culture and history” [37 people], and “Laid-back atmosphere” [35 people]. Interestingly, 15 people replied that they expected “Japaneseness” from Okinawa whereas 30 people answered they expected “Okinawanness”. For Japanese tourists, Okinawa is the place of “foreign sentiment”. However, for Western people, since Okinawa is still part of Japan, they expect sense of Japan from Okinawa.

Top five of “Things that were as expected from Okinawa” were 43 people of “Good food”, 40 of “Interaction with local people”, 38 of “Okinawanness”, 37 of “Laid-back atmosphere”, and 36 of “Unique culture and history”. On the other hand, the number of answers for the question “Things that fell short of your expectations” was comparatively low [total 68]. Therefore, basically, it is safe to say that travel to Okinawa didn’t disappoint their expectations.

As “Things that fell short of your expectations”, “Beautiful beaches and oceans” [10 people], “Interaction with local people” [7 people], and Natural Environment [7 people] were included. On the contrary, as “Things that exceeded your expectations”, “Okinawanness” [27 people], “Interaction with local people” [26 people], “Good food” [26 people], “Laid-back atmosphere” [25 people], and “Hospitality” [25 people] were chosen. Keywords here are “interaction with local”, “beautiful nature”, and “unique culture”.

Fig. III-1-24. Things You Expected from Okinawa

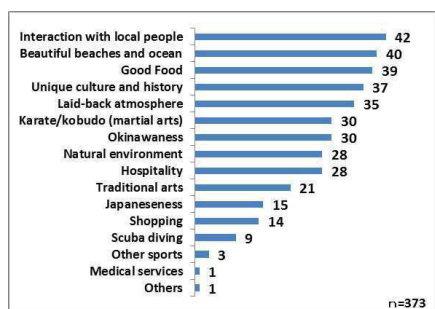


Fig. III-1-25. Things That Were as Expected from Okinawa

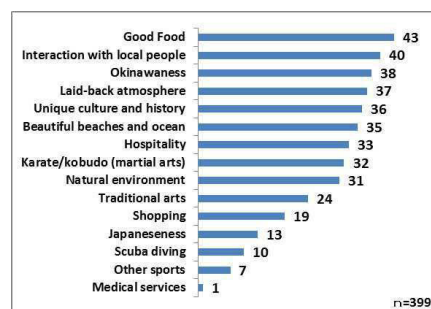


Fig. III-1-26. Things That Fell Short of Your Expectations

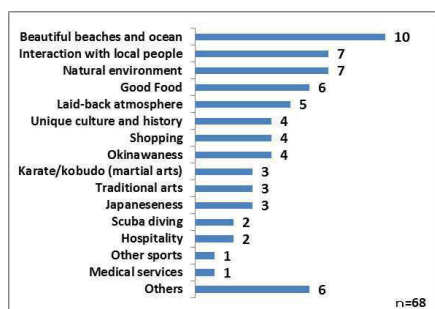
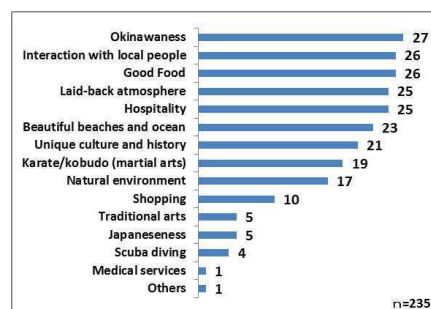


Fig. III-1-27. Things That Exceeded Your Expectations



As good experiences in Okinawa, the respondents specifically cited that natures and beaches which are away from urban area, Okinawans’ hospitality mind, excellent environment for Karate training. On the other hand, as bad experiences, the difficulties in communication due to language barrier, dissatisfaction with the transportation system, and frustration over inconvenient ATMs were mentioned. Also, some complained about US servicemen.

Table.III-1-2. Good Experiences of Okinawa Trip (Specifically)

Good Experiences of Okinawa Trip (Specifically)
<ul style="list-style-type: none"> •Iejima island trip was amazing, especially the beach! •During my time in Okinawa, I loved it. Most everyone you meet is friendly. The food is amazing. The history is just fascinating. I loved to spend days at the beach. •The people in Okinawa are the most open, helpful, amazing locals I've ever been around. •Visits to small islands. Diving and beaches outside of the larger cities. •Very enriching journey, exceptional culture • Highly development of the identity of the people of Okinawa. •Zamami island, Hiji waterfall, Friendly people •Camping in Zamami •I think the people are very nice and interactive compared to Tokyo and other cities on the mainland. There's lots of facilities and services for tourists. •Hotel clerks extremely eager to help with questions about what and how to do things. •The people are amazing; I miss them every day. Loved Izakaya, too. •Security and peacefulness. Every day and every night, we can go anywhere we want. •meeting with karate sensei, as well as the crew from Gateway to Okinawa and the OKKB.org •Karate training with great visitors from other parts of the world. •Karate training with great visitors from other parts of the world. •Friendly people, tidiness

Table.III-1-3. Bad Experiences of Okinawa Trip (Specifically)

Bad Experiences or Problems You Experienced in Okinawa (Specifically)
<ul style="list-style-type: none"> •Lack of English outside of high-tourist attractions. •Okinawan people don't understand English at all. •Language problem •Nobody speaks English. •Language-communication •Couldn't talk to local Okinawan people. •Communication problems because my Japanese isn't very good. Not really a "bad" experience just a little difficult sometimes. •Staff in the hotel was nice and friendly, but knowledge of the English language is very limited. •No street signs, but we got used to it. •The winding streets in Naha; without a GPS system on board, it is IMPOSSIBLE to find anything. •Bit difficult to find English info about city busses. •Buses are not punctual and too expensive to the point they can be prohibitive in long distance journeys for example Naha to Nago trips. •Naminue beach. Transportation and traffic around Naha. Monorail was of little use. •Daily traffic jams •Bicyclists have to be very careful, it is not safe here. •I couldn't use my bank card in any ATM over the holiday period, it didn't really bother me but from a tourism point of view other people might find it frustrating! •Hard to get cash from ATMs. Public transportation is much less than Tokyo. Wasn't obvious before travelling there. Should have brought an International Drivers license. •Hard to find ATMs. Tokyo I easily used 7Eleven, Post Office. Only Post Office would work in Okinawa, and there were many national holidays in a row, and I couldn't get cash. Transportation should be a category. I wish I had planned to rent a car (get a international drivers license). Public buses are confusing, not inexpensive. • Manythings in Okinawa is relatively expensive, e.g. fresh fruits etc. •I was so surprised about the price of typical fruit, like a Mangos, Shima-Bananas... we've tried but enough expensive to eat everyday. •Staff at airport were quite unpleasant and unruly. •Detained in Naha airport for verification purposes due to my 'lack of destination' in my stay. My friend had made those arrangements and was waiting for me in the arrival terminal. She almost left when I did not come out with my flight group. •American servicemen (some) •Aversion of the Okinawans to Caucasian origin, since we are confused with Americans. •Because there are so many Americans many public transportation providers often cold shoulder customers. •The bad experiences have been only with westerners who didn't have chance yet to start thinking in a more friendly way. •Okinawa bears the burden of national security by having too many US military facilities. The government's support to find a relief for Okinawa seriously is not enough. •I was badly injured in Okinawa, but the medical care was superb and of a much higher caliber than I would receive in the States. •Roads are confusing, traffic is horrible, drivers on roads are dangerous, the island seems over developed and lacks natural beauty compared to other similar destinations. It may look nicer than mainland Japan, but its not as nice as other islands that offer a similar product •Typhoon Bolaven ruined the beach experience, maybe next time we'll be more lucky. •Pollution (too many plastic bags, motors, etc.) •The residents staying upstairs was noisy. •Too many police sirens, especially at night.

Concerning the satisfaction level with travel to Okinawa, this survey investigates 10 aspects; overall satisfaction of the trip, accommodations, natural environment, transportation systems, tourist facilities, cuisines/meals, hospitality, ability of language skill of Okinawan, signboards, and convenience of payment.

Regarding overall satisfaction, 70 percent of respondents were “very satisfied” and other 30 percent were “satisfied”. In other words, all of respondents were somewhat satisfied with Okinawa travel.

As to accommodations, “Very satisfied” and “Satisfied”, all together 95 percent of them show their satisfaction. However, hotel employees’ lack of language ability was pointed out in other questions.

In terms of natural environment, 43 percent of respondents chose “Very satisfied” and 41 percent said “Satisfied” whereas 12 percent of them chose “No opinion” and 4 percent said “Unsatisfied”. Okinawa should take this result seriously since Okinawa promotes its rich natural environment.

Concerning Okinawa’s transportation system, 38 percent of respondents felt “very satisfied” and 43 percent felt “Satisfied”. On the other hand, 11 percent of them felt “Unsatisfied” or “Very unsatisfied”. In the free comments, there were visitors who requested signs in English or English announcement in city buses, and complained about expensive bus fare. Also, constant traffic jams and safety hazard for cyclists were pointed out.

Fig. III-1-28. Satisfaction Level with Trip to Okinawa (Overall)

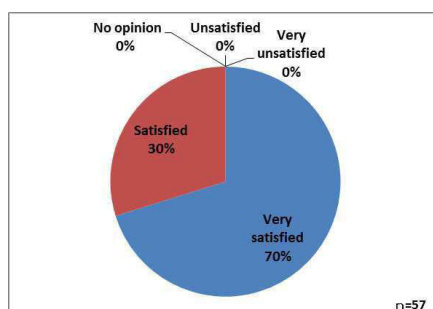


Fig. III-1-29. Satisfaction Level with Accommodations

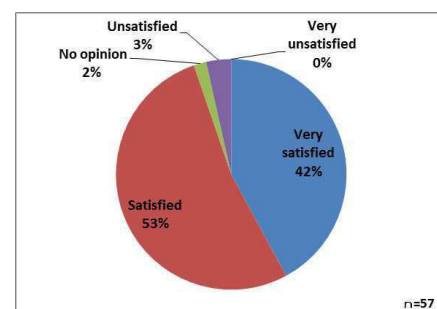


Fig. III-1-30. Satisfaction Level with Natural Environment

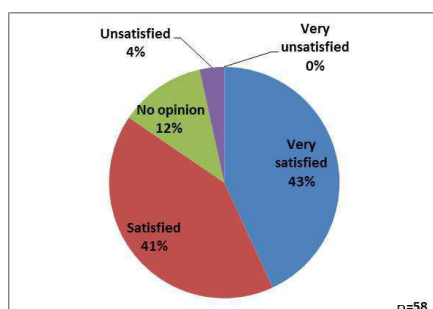
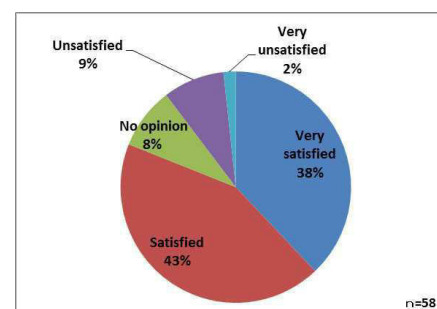


Fig. III-1-31. Satisfaction Level with Transportation Systems



On the subject of tourist facilities in Okinawa, 81 percent of respondents answered “Very satisfied” or “Satisfied”. Also, in regard to cuisine/meal, 96 percent of them said “Very satisfied” or “Satisfied”. In addition, about Okinawa’s hospitality, 93 percent of them answered “Very satisfied” or “Satisfied”. These aspects got comparatively high marks from Western visitors.

On the other hand, as to Okinawans’ language ability, whereas 52 percent of them answered “Very satisfied” or “Satisfied”, 24 percent of them answered “Very unsatisfied” or “Unsatisfied”, and 24 percent chose “No opinion”. It is impossible to improve the language ability of Okinawan people in a short space of

time, so Okinawa should take effective measures for this issue as soon as possible. Also, tourism industry in Okinawa should take immediate actions that are feasible with no hassle; for example, preparing free neighborhood maps, explanatory leaflets, food menu, and etc. in multi-languages definitely can help foreign tourists to have safe and comfortable travels.

Fig. III-1-32. Satisfaction Level with Tourist Facilities

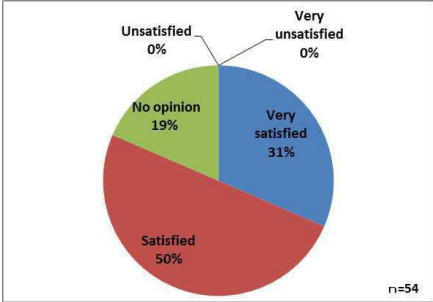


Fig. III-1-33. Satisfaction Level with Cuisine/Meal

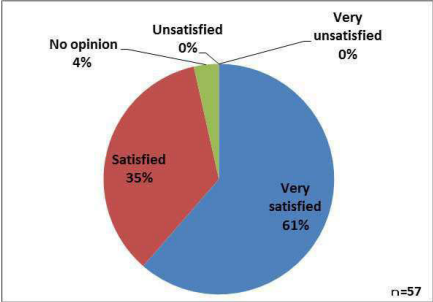


Fig. III-1-34. Satisfaction Level with Hospitality

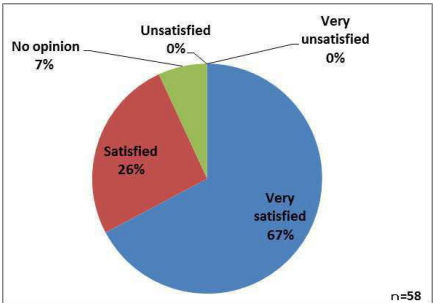
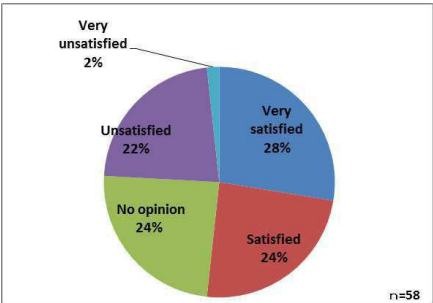


Fig. III-1-35. Satisfaction Level with Language Ability of Okinawan



As to signboards in Okinawa, the respondents showed similar attitude to the results of language ability question. Signboards are very important to have safe and comfortable travels in foreign countries, especially places local people don't speak English. Okinawa should improve its signboards as soon as possible.

Regarding payment methods, 72 percent of respondents answered "Very satisfied" or "Satisfied" and 26 percent said "No opinion". However, there were some negative comments about inconvenient ATMs. Okinawa seems to be better keep taking actions to deal with these complaints.

Fig. III-1-36. Satisfaction Level with Sign Boards

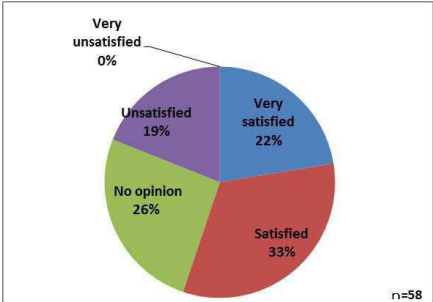
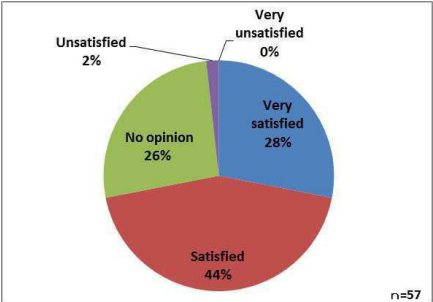


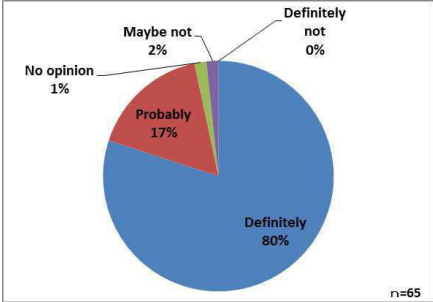
Fig. III-1-37. Satisfaction Level with Convenience of Payment



Lastly, in terms of the question of plans to revisit to Okinawa, 80 percent of respondents answered "Definitely", 17 percent of them answered "Probably". Almost all of respondents have incentive to revisit

Okinawa. The survey which Okinawa prefecture conducted included same question and its result also showed visitors' incentive to come back to Okinawa: 93 percent of American and 79 percent of "Others" which includes Europeans, answered that they want to revisit Okinawa (ODCTS, 2012d). Although there were some drawbacks in Okinawa tourism, many of Western visitors can be satisfied by travel to Okinawa.

Fig. III-1-38. Plans to Revisit to Okinawa



2. Interview Researches with Tour Agencies and Japan National Tourism Organization

With the purpose of understanding Okinawa tourism from the view point of European, interview researches with tour agencies in European countries which deal with tour to Japan was conducted. Also, to understand government efforts related to inbound tourism, the interview with overseas offices of Japan National Tourism Organization were conducted.

a) Survey Object

- Into Japan Specialist Tours (Oxford, www.intojapan.co.uk/)
- Oku Japan (Twickenham, <http://www.okujapan.com/>)
- Unique Japan Tours (London, <http://www.uniquejapantours.com/>)
- JALPAK Frankfurt Office (Frankfurt, <http://www.jalpak.de/>)
- MIKI Reisen GmbH (Frankfurt, <http://www.miki-reisen.de/>)
- Japan National Tourism Organization [JNTO] London Office and Frankfurt Office
- London Tourist Information Centre (<http://www.visitlondon.com/tag/tourist-information-centre>)

b) Survey Method

Interview research based on the questionnaire form.

c) Survey Content

Trends in travelers to Japan, popular tourist destinations, marketing potential of Okinawa Tourism, etc.

d) Findings

Among European countries, this research focused on the UK and Germany that send many tourists to Japan. The interviews with five tour agencies, which locate in the UK or Germany and deal with tour to Japan, and two JNTO offices, London and Frankfurt, were conducted.

Those five tour agencies are specialized for (or focus on at least) tours to Japan, and most of them basically run web-based businesses. Their customers are not only in the UK or Germany but also in other

European countries, the US and Australia. For the customer care, some of them have offices in Japan and others have local agents and guides to support their customers' travel in Japan. Many of their customers are individual travelers. For the customers' safe and comfortable travel, some of them provide customized tour guidebooks.

JNTO Frankfurt office's cover areas are Germany, Austria, Poland, Czech, Slovakia, Hungary, Slovenia, Rumania, Serbia and Montenegro, Croatia, Bosnia and Herzegovina, Bulgaria, Macedonia, Yugoslavia, Albania, and Switzerland. London office covers the UK, Russia, the Netherlands, Iceland, Sweden, Denmark, Norway, Finland, and European countries except countries, which are covered by Frankfurt office or Paris office (mainly South Europe), Middle Eastern countries, some African countries where English is used.

< Trends in Travelers to Japan >

In the UK, people can take 7 to 10 days off for vacation trip in many cases (JNTO London [JNTOL], 2013). Most of people who visit Japan plan 10 to 14 days trip to Japan (Into Japan Specialist Tours [IJST], 2013). In Germany, although it depends on job types, the working environment allows people to take long leaves compared to other countries (MIKI Reisen GmbH [MRG], 2013), and the average duration of travel to Japan is 10 to 14 days (JNTO Frankfurt [JNTOF], 2013). Those who have children tend to choose school holiday seasons to go overseas trip (JNTOL, 2013). Popular destinations in Japan are Tokyo, Kyoto, Nara, Hiroshima, Hakone, Nikko, etc. and the tours to those cities are called "Golden Route" (JNTOL, 2013). Recently, Kurobe, Tateyama, and Matsumoto, which has Matsumoto castle, become popular (Unique Japan Tours [UJT], 2013). So far, Hokkaido, Tohoku, Sikoku, Kyusyu, and Okinawa are not included in the mainstream of tours to Japan (UJT, 2013). European people prefer to visit Japan in the spring (March and April) and fall-time (October and November) in Japan (UJT, 2013), and request the tours to enjoy Hanami (cherry blossoms viewing) for spring and Koyo (autumn leaves) for fall (MRG, 2013). Among students, summer time can be an alternative to go to Japan (UJT, 2013). Overall, since summer in Japan is too hot for sightseeing and airfare and accommodations are comparatively expensive in July and August, many of European people tend to go to Japan in spring or fall (IJST, 2013).

In the UK, it seems like people, who are willing to visit Japan, are in the middle to upper class, or are retired who have enough savings (IJST, 2013). On the other hand, in Germany, those who are in the middle class are the majority, and they choose reasonably priced services (MRG, 2013). Considering German market, about 90 percent people are in the middle class like Japan, its potential as a sales target for Japanese tourism is high (JNTOF, 2013). In the basis of the age group of tourists to Japan, many people are in 30s to 40s and post-retirement in the UK (JNTOF, 2013). German seems to have the similar tendency with people in the UK (JNTOF, 2013). Regarding the budget of travel, although it totally depends on the rank of accommodation, the average budget is 2,000 to 3,000 pound per person in the UK, and 2,500 to 3,000 Euros per person in Germany.

In the UK, people who ask for the arrangement of the trip to Japan seem to prefer comfort and convenience to the low price (IJST, 2013). In contrast, reflecting their solid character, German tends to be more value-oriented when they plan for trips (JNTOF, 2013). Many of German prefer frugality, but they are willing to pay for the things that they believe those things are worthwhile, such as cars and habitations

(JALPAK Frankfurt [JALPAKF], 2013). For many of German, travelling is one of the something of value, and a lot of people prioritize travelling over others and try to save money for travelling, although they don't prefer expensive tours (MRG, 2013). About 70 percent of Germans who actually visit Japan choose FIT (foreign Independent Tour), and they arrange accommodations according to the purpose of their stay (JNTOF, 2013). For example, sometimes they stay at economy hotels in Tokyo, but later, they stay at Japanese-Ryokan, which costs hundreds of dollars for a night (JNTOF, 2013). Thus, Germans prefer good economic independent travels. Therefore, some tour agencies in Germany offer range of 2 or 3 days short tours and let customers arrange their tour plans by their own needs (MRG, 2013).

For most Europeans, the main purpose of travelling to Japan is to experience "true Japan" (Oku Japan [OJ], 2013). The average European's image towards Japan is "Shrines and Temples", "Fuji-Yama", "Cherry Blossoms", "Geisha", "Kabuki", or something like those things (IJST, 2013). Even today, many Europeans visit to Japan in search for stereotyped image of Japan (JNTOF, 2013). On that point, Kyoto reveals a better understanding of Europeans' needs, and the city provides variety of cultural experience programs as its service products such as staying at a "Machiya"(old Japanese style wooden house), dressing in "Kimono", having a conversation with a "Geisha", and most importantly, that those services are available with English guides (JNTOF, 2013).

European people also have strong image towards Japan as modern and high-tech city; the punctuality of trains, especially, it isn't too much to say that "Shinkansen" (bullet train) is one of the famous tourism resources in Japan (IJST, 2013). In addition, the strong image of the other side of Japan, such as Tokyo Sky Tree, inner city forests of neon, Akihabara as the center of "Japanese anime culture", get planted in Europeans' head, and those people believe Japan has very unique culture where both "classical" Japan and "cutting-edge" Japan coexist (UJT, 2013).

However, it doesn't mean that average European feels a strong sense of familiarity like the average Japanese person feels towards European culture (JNTOF, 213). So, they don't always have accurate knowledge about Japan; they sometimes confuse Japanese race, culture, history, etc. with other Far East countries such as Chinese or Korean ones (JALPAKF, 2013). Exceptionally, people in Dusseldorf, which is famous city as the industrial heart in Germany, are familiar with Japanese culture since the city has a lot of Japanese-affiliated companies (JALPAKF, 2013).

It takes time to be chosen as a tourism destination, but Japan can indulge European tourists' cultural curiosity (JNTOL, 2013). There are a lot of feedbacks from people after visiting Japan, and many people said they would revisit Japan (JNTOL, 2013). But, as long as their trip were not business purposes, it seems that travelling to Japan is once in a lifetime event for many of them because, moneywise and timewise, it costs a lot (UJT, 2013). Therefore, Okinawa has to be chosen as a travel destination before European tourists actually leave for Japan (JALPAKF, 2013). For your information, about 60 percent of travelers from Germany and 50 percent of travelers from the UK visit japan for business purposes, and the number of repeat visitors of those counties are relatively high when it includes business travelers (JNTOF, 2013). When Europeans collect information on Japan, they mainly use Internet, newspapers/magazines, the website of tour agencies, and most of travelers decide where to stay and how to get before leaving for Japan (JNTOL, 2013). Therefore, Okinawa has to be in the list of candidate sites for travel destinations when those Europeans arrange their tour to Japan.

As one of notable market for Okinawa tourism, JNTO London office mentioned Russia. Among some Russian wealthy class, unknown resort destinations are popular because they can keep out of the public gaze and enjoy their own private time (JNTOL, 2013). Since Okinawa prefecture focuses on the higher socioeconomic group, it should pay attention to the trends of Russian market. JNTO London office already has developed tours to Okinawa, and, although it just started to promote the tour, feels a good response from the market (JNTOL, 2013).

JNTO Frankfurt office makes expectations on Polish market as a potential market for Japanese tourism business. Poland has not only high economic growth rate but also fervor for education, and its college-going rate is about 70 percent (JNTOF, 2013). Therefore, the country can be expected more economic growth (JNTOF, 2013). Additionally, Japan and Poland’s relationship is very favorable (JNTOF, 2013). Since Poland has many Japanophile people, cultural and economic interactions can be developed through tourism (JNTOF, 2013).

Table.III-2-1. Trends in Travelers to Japan

Trends in Travelers to Japan	
<ul style="list-style-type: none"> - Vacation trip: UK → 7-14 days, Germany → 14-30 days - Families with kids tend to choose school holiday seasons - Round-trip tour of Golden Route (Tokyo, Hakone, Kyoto, Nara, Hiroshima, etc.) - Hokkaido, Tohoku, Shikoku, Kyusyu, and Okinawa are not mainstream - Spring and Fall are popular - Economic status of travelers to Japan UK → Middle to upper class, or retired with enough savings Germany → Middle class - Budget (per person including airfare) UK → 2,000 - 3,000 Pound, Germany → 2,500 - 3,000 Euro - Age group → 30s, 40s, and retired (UK and Germany) 	<ul style="list-style-type: none"> - Attitudes when people choose travel related service UK → Comfort and convenience over low price Germany → Value-oriented, but willing to pay for valuable things - Purpose of Travel to Japan is experience “True Japan” - Stereotyped image: “Shrines and Temples” “Fuji-Yama” “Cherry Blossoms” “Geisha” “Kabuki” - Coexists of traditional classical Japan and cutting-edge Japan - Sense of familiarity: Europeans < Japanese → Many Europeans don’t have accurate knowledge about Japan - Europeans’ satisfaction level towards travel to Japan is high - Many wants to revisit Japan but one time event for most people - Notable markets: UK, Germany, France, Russia, Poland

< Tourism Resources of Okinawa >

Among Europeans, Okinawa has started to get its recognition as a beach resort but not as a destination of cultural heritage, which is known as Ryukyu Dynasty culture (JNTOL, 2013). As a beach resort destination, Okinawa is very popular in the domestic market. However, compared to Okinawa, other Asian beach resorts such as Phuket and Bali have big price advantages in airfare, accommodations, food and drinks, and so on (IJST, 2013). These Asian beach resorts also have developed for the Western market, therefore many people, who are engaged in tourism industry, are able to communicate in English at some level (IJST, 2013). In addition, there are frequent charter flights between major cities in Europe and those Asian resorts destinations (IJST, 2013). Thus, as a beach resort destination, those Asian cities are competitive over Okinawa.

In terms of German’s favorite resort destinations, there are Majorca, Turkey, Thailand, Malaysia, and Singapore. Since many charter flights from cities in Germany are available, German people can enjoy budget-pleasing vacations in Majorca (JNTOF, 2013). Turkey, which has developed through the mixing of various cultures, is also very popular among German people because of its unique culture and cheap price (JNTOF, 2013). Furthermore, regarding Thailand, Malaysia, and Singapore, because of the history that Germany had been accepted boatpeople, there are many second or third generations of those people as its citizen (MRG, 2013). Therefore, German people are familiar with food and other cultures of those Asian countries, and visibility of these countries are comparatively high (MRG, 0213).

Concerning the beaches in Okinawa, most of beaches and surrounding businesses close after its peak season (May to September) even though other seasons are still pleasant and swimmable for the Westerners (JNTOL, 2013). The travel guide, Lonely Planet, also introduces Okinawa's climate that swimmable through the year (Rowthorn et al., 2011). Therefore, Okinawa is expected to consider if it can improve its beach related conditions and regulations to have more tourists from Western countries in its low season.

Okinawa also should try to sell its unique culture, which only Okinawa can offer, besides its resort feeling more than ever since most of tourists to Japan expect to experience cross-cultural experience (JNTOL, 2013). As of now, Okinawa doesn't have much visibility regarding the rich history of the Ryukyu Dynasty, a cultural aspect of Okinawa that can be used as an incentive for Europeans to visit Okinawa (JNTOL, 2013). As a mean of applying its unique culture as an attractive tourism resource, Okinawa can emphasize the cultural differences between Okinawa and other part of Japan (JNTOL, 2013). For example, Okinawa's standout mixed Asian culture can be compared to Tokyo's futuristic image and Kyoto's stereotyped Japanese image. Since Okinawa and other cities in Japan have very different town sceneries, people, food and many of other things, Okinawa can exploit its characteristic in the tourism business (IJST, 2013).

To sell Okinawa's unique culture, "community based tourism [CBT]" is also promising (OJ, 2013). Although there are various interpretations of CBT, its basic definition can be "the community-centered tourism" (Hahakura, n.d.). In particular, for example, there are real life experiences of local community thorough homestay in rural areas, and sightseeing tour of history/culture/nature with local tour guides. Tanaba city in Wakayama prefecture is one of the famous cities in Japan that offers services that focuses on Western tourists' needs with combined efforts of the local government and the private sector (OJ, 2013). Tanabe has "Kumano-Kodo" which is part of the world heritage-listed site, "Sacred Sites and Pilgrimage Routes in the Kii Mountain Range", and its cultural landscape and beautiful nature are highly valued among foreign visitors (Ogata, 2011). Tanabe, therefore, decided to focus on the Western tourists, and started to research the needs of Western tourists from the point of view of foreigner (Kubo, 2012). After those researches with foreigners' sensibility, the tourism businesses in Tanabe were comfortably able to boost the level of preparations to receive international visitors: Applying posters and leaflets with multi-languages by the methods not to interfere with the beautiful views and distributing frequently-asked questions papers, which are written side by side in English and Japanese, to tourist facilities, accommodations, restaurants, and etc. to make it easier for visitors and businesses to communicate each other (Kubo, 2012).

In Okinawa, if the communities can develop nature and/or traditional arts expiring tours with local people, Okinawa may be able to get more attentions from the Western people (OJ, 2013). According to the survey result, Okinawa has many Western travelers, who visit to Okinawa for Karate or Kobudo training. Since Karate is strongly connected to Ryukyu culture in many ways, the CBT tours which offer martial arts trainings with local community life experiences can be one of the more attractive tours. In addition, Okinawa has a rich natural environment as represented by beautiful coral reefs and numerous species of marine, lives which attract divers, and subtropical jungle with endemic flora and fauna. Therefore, the CBT tours combined with nature experiences such as diving or hiking would be catching tourist attractions (OJ, 2013). As a matter of fact, nature tours in Japan are very popular among European tourists (OJ, 2013). For example, the access to Yaku Island is not easy even from other cities in Japan, but a nature tour to the island is popular for active tourists

since the island offers some very unique nature experiences (OJ, 2013). Okinawa already has those nature tours such as diving and snorkeling at beautiful oceans and beaches, kayaking at mangrove forests, and trekking at rivers and forests. Now, Okinawa is required to have more tour guides who understand local natural environment and are able to introduce its blessed nature in other languages to increase travelers from Western countries.

Table.III-2-2. Okinawa's Tourism Resources

Okinawa's Tourism Resources	
<ul style="list-style-type: none"> ▪ Visibility as a Beach resort is becoming high ▪ Ryukyu dynasty culture is little-known ▪ Less competitive as a beach resort against Asian countries ▪ Beach season starts late and closes early <ul style="list-style-type: none"> → Spring and Fall in Okinawa are swimmable for the Westerners ▪ Need to push appealing culture besides beach resort image ▪ Okinawa is totally different from the image of "true Japan" <ul style="list-style-type: none"> → Contrast between "Japan-ness" and "Okinawa-ness" → Strong marketing strategy is required 	<ul style="list-style-type: none"> ▪ Community Based Tourism is promising for Okinawa <ul style="list-style-type: none"> → Attract foreign tourists with local characteristics → Karate/Kobudo, traditional arts, etc. ▪ Nature tours <ul style="list-style-type: none"> → Diving, snorkeling, kayaking, trekking, etc. → Bilingual tour guides who understand local culture and nature

< Accommodations >

Many Western people want to try to stay at a Ryokan (Japanese style inn) at least once while they are in Japan (JALPAKF, 2013). However, many of them choose to stay at a Ryokan for a few nights; some of them feel discomfort from sleeping on a futon on tatami floors, and some have trouble relaxing in the room because serving ladies often come and go to take care of guests (JALPAKF, 2013). It is also true that many Western people get confused by unique rules; taking shoes off when guests enter the room, how to use large communal bath, and cuisines which guests never have seen before and don't know how to eat (IJST, 2013). In terms of a high-class Ryokan, since some guests can't enjoy Japanese style services as they pay for, tour agencies have to be required careful handlings when they introduce those types of accommodation to customers (UJT, 2013). Most Western tourists stay at Ryokan type accommodations for a few nights and stay at familiar Western style hotels for the rest of their stay (JNTOF, 2013).

In the UK, travel agents often recommend superior class tours for the people, who choose Japan as their travel destination, since those customer segments prefer quality to low prices (UJT, 2013). Regarding German tourists, they often choose 3 star hotels and value low prices over the size of rooms (JNTOF, 2013). Many of German travelers are fine with staying at economy hotels as long as the locations are safe and convenient (MRG, 2013). For those who choose economy class tour, "reasonable price" is one of the important keywords (JNTOF, 2013). If the purpose of their trips is enjoying the nature, not few German travelers are also interested in cheap accommodations such as campsite and bungalow (JNTOF, 2013). On the other hand, as it was mentioned above, German don't mind to spend a huge amount of money for Ryokan if they are interested in (JNTOF, 2013). Considering Russian market, hotels in Okinawa have some issues. Hotels in Okinawa don't have enough "double rooms" but most hotels give extra importance to have "twin rooms" since Japanese prefer "twin rooms" (JNTOL, 2013). In order to have Russian customers, especially, middle to upper customers, hotels have to prepare "double rooms" (JNTOL, 2013). Furthermore, travel agencies have to recommend "suite rooms" for those travelers "suite rooms" since size of rooms and beds are too small (JNTOL, 2013).

To travel agencies, when they look for accommodations in Okinawa to introduce to their customers, it is easy to find information of better-class hotels since those hotels have enough information in English on their website, but it is hard to introduce reasonable accommodations such as economy hotels or B&Bs because agencies can't have information of those accommodations in a comprehensive way in English (MRG, 2013). Obviously, it is very difficult to collect information for travelers who try to book their trips by themselves, even by online booking service because of language differences. A lot of Western tourists enjoy individual travel, and what they need is a comprehensive website that offer information of reasonable hotels, the view from those hotels, sightseeing spots which are nearby, what kind of food guests can have, etc. (JNTOF, 2013). Nowadays, there are some multi-language accommodation search sites, but they don't have enough information on accommodations in Okinawa (JNTOF, 2013). In fact, according to Okinawa prefecture, more than 1,300 accommodations are registered to the prefecture (ODCTS, 2012a), whereas even one of the world biggest travel website Expedia (<http://www.expedia.co.uk/>) had only about 100 accommodations, and the site doesn't have enough information on those accommodations, too.

Table.III-2-3. The Number of Accommodations in Okinawa by Area and Type (December, 2012)

	Hotel / Ryokan (Large-midsizedJapanese inn)				Minsyuku (Small-size Japanese inn)				B&B / Rented Villa				Guest House							
	# of Facility	Percentage			capa-city	# of Facility	Percentage			capa-city	# of Facility	Percentage			capa-city					
		J	W	total			J	W	total			J	W	total		J	W	total		
Okinawa Is. (South)	113	2.2	97.8	100.0	27,351	39	62.8	37.2	100.0	692	10	31.1	68.9	100.0	114	33	8.8	91.2	100.0	1,272
Okinawa Is. (Mid)	53	8.0	92.0	100.0	9,395	31	46.0	54.0	100.0	602	18	13.1	86.9	100.0	339	28	7.2	92.8	100.0	353
Okinawa Is. (North)	62	3.3	96.7	100.0	21,627	61	75.0	25.0	100.0	1,009	96	31.1	68.9	100.0	2,074	16	9.3	90.7	100.0	249
Miyako Islands	39	11.7	88.3	100.0	4,865	59	64.3	35.7	100.0	750	29	38.4	61.6	100.0	590	32	38.5	61.5	100.0	500
Yaeyama Islands	68	4.6	95.4	100.0	9,364	160	75.0	25.0	100.0	2,909	57	33.0	67.0	100.0	859	57	30.5	69.5	100.0	859
Other Islands	30	18.6	81.4	100.0	2,842	137	76.7	23.3	100.0	3,192	27	47.9	52.1	100.0	572	3	0.0	100.0	100.0	71
Total	365	4.5	95.5	100.0	75,444	487	71.5	28.5	100.0	9,154	237	34.0	66.0	100.0	4,548	169	17.7	82.3	100.0	3,304

	Weekly Apartment (Furnished, for short stay)				Publicly Owned Accommodation				Youth Hostel				Total							
	# of Facility	Percentage			capa-city	# of Facility	Percentage			capa-city	# of Facility	Percentage			capa-city	# of Facility	Percentage			capa-city
		J	W	total			J	W	total			J	W	total			J	W	total	
Okinawa Is. (South)	25	4.9	95.1	100.0	1,029	5	43.0	57.0	100.0	433	2	17.8	82.2	100.0	207	227	4.4	95.6	100.0	31,098
Okinawa Is. (Mid)	12	0.0	100.0	100.0	199	2	100.0	0.0	100.0	204	0	-	-	-	0	144	10.4	89.6	100.0	11,092
Okinawa Is. (North)	3	0.0	100.0	100.0	52	4	25.9	74.1	100.0	353	0	-	-	-	0	242	8.3	91.7	100.0	25,364
Miyako Islands	10	3.6	96.4	100.0	252	5	48.5	51.5	100.0	276	1	80.0	20.0	100.0	40	175	21.4	78.6	100.0	7,273
Yaeyama Islands	10	6.7	93.3	100.0	146	4	68.7	31.3	100.0	175	3	77.5	22.5	100.0	110	359	21.9	78.1	100.0	14,422
Other Islands	1	0.0	100.0	100.0	27	12	52.7	47.3	100.0	1,001	0	-	-	-	0	210	49.6	50.4	100.0	7,705
Total	61	4.3	95.7	100.0	1,705	32	49.1	50.9	100.0	2,442	6	49.5	50.5	100.0	357	1,357	12.5	87.5	100.0	96,854

J : Japanese style rooms W : Western style rooms

*ODCTS (2012a) "Directory of Tourism 2012 (平成 23 年版観光要覧)"

As another challenge for tour agencies and individual travelers, there are some accommodations (most of all, reasonable accommodations) that are negatively received by foreign customers because of language difference, although this issue is not peculiar to accommodations in Okinawa (JNTOL, 2013). Now, if there is a resort destination that can take it head on and focus on foreigners even though they can only offer simple services with gestures and little English, the popularity of the area must be glowing (IJST, 2013). In addition, if accommodations can bring moderately luxury atmosphere and achieve simple services for foreigners, those accommodations can be expected to have more Western guests than others (IJST, 2013). Regarding this opinion, Okinawa Culture Ambassador, Michel Runge, also referred to accommodations in Okinawa in his speech at the symposium "Opportunities and challenges of Inbound Tourism to Okinawa", which took place in 2013 in Okinawa. He delivered his opinion that many Western travelers, who are categorized as DINKY (Dual Income and No Kids Yet), prefer to stay in accommodations which are comfortable enough but not too

luxurious, and he mentioned “Kerama Terrace” in Tokashiki Island as an example (Nansei-shoto Industrial Advancement Center [NIAC], 2013).

Since the keyword for the hotel business in the next years is said “Small and Luxury”, Okinawa doesn’t necessarily have to invite huge foreign hotels (JNTOF, 2013). However, there are some opinions that those foreign capitals can improve Okinawa’s response capabilities to foreign visitors, and having world-renowned hotel chains can enhance Okinawa’s visibility in the world (JNTOL, 2013). In response to these statements, some said that the existence of hotel complexes doesn’t increase Okinawa’s appeal, and others said that modern concrete buildings don’t attract the people who want to enjoy Okinawa’s nature.

Regardless of the rank of accommodations, offering Wi-Fi service is very important for foreign travelers (MRG, 2013). Also, besides accommodations, if Okinawa can offer Wi-Fi services here and there, foreign visitors’ travel comfort would be dramatically improved (MRG, 2013).

Table.III-2-4. Accommodations in Okinawa

Accommodations in Okinawa	
<ul style="list-style-type: none"> • The Westerners are interested in staying at “Ryokan” but a few nights stay is enough <ul style="list-style-type: none"> → Sleeping in Futon on the floor is not comfortable → Unique and complicated rules (taking shoes off, etc.) → Some can’t understand merits to stay Ryokan • Basically, people prefer to stay western style hotels • Preferences for accommodations <ul style="list-style-type: none"> UK → “Superior” to seek for a certain level of comfort Germany → “Economy” or “Standard” with put emphasis on economic efficiency Russia → “Suite” to enjoy comfort and luxury • The Westerners prefer “Double room” over “Twin Room” • Regardless of rank of accommodations, Wi-Fi is important 	<ul style="list-style-type: none"> • Difficult to get information on reasonable accommodations <ul style="list-style-type: none"> → They don’t offer foreign language service almost at all → Absence of comprehensive web service → Lack of detailed information on accommodations (amenities, View from hotels, restaurants and bars nearby, etc.) → Some businesses refuse to accept foreign guests → Chances for hotels which can offer simple English services • Future keyword is “Small and Luxury” • Need of foreign hotel chains <ul style="list-style-type: none"> → Improve response capabilities to foreign visitors → Enhance Okinawa’s visibility in the world → Hotel complexes doesn’t increase Okinawa’s appeal → nature lovers don’t be attracted by modern concrete buildings

< Other Facilities & Services >

Tourist information centers have much to contribute not only to foreign tourists but also to domestic tourists. In Okinawa, there are some information centers such as the ones in the Naha airport building which are operated by OCVB, and the one on the Kokusai street which is operated by Naha Tourism Association, and others which are operated by local municipalities or associations. However, there are only a few information centers that can give information in English or other foreign languages. In addition, among the websites that are managed by those tourist information centers, only “Okinawa Story (<http://www.okinawastory.jp/en/>)”, which is managed by OCVB, is the only websites which offers information in other languages. Others are only in Japanese or using automatic translation systems; the websites using automatic translations are hardly acceptable.

To improve tourist information centers’ response capabilities to foreign visitors, JNTO started the recognition system of tourist information centers (JNTO, 2013b). Under the system, tourist information centers are categorized by response capabilities to foreign languages, location environment, functions, etc. (JNTO, 2013b). The highest level, category 3, is defined as “The center that always can provide nationwide tourist information in English, Chinese, and Korean, seven days a week. Wi-Fi service is available. The offices have to be located at convenient places for foreign tourists.” (JNTO, 2013c). In Okinawa, there is no information center that is categorized as level 3 (JNTO, 2013c). Category 2 is defined as “The center that can always

provide tourist information in at least English.” (JNTO, 2013c). The information center in the Naha airport domestic building is the only one that is categorized level 2 in Okinawa (JNTO, 2013c). Category 1 is defined as “the center that can provide local tourist information in English in one way or the other.” (JNTO, 2013c). The tourist information center in Naha airport international building, the one operated by Naha Tourism Association, and the privately-owned information center near the Oroku station are the only three tourist information centers which are categorized as level 1 (JNTO, 2013c). Now, there is only one tourist information center that can at least provide tourist information in English in Okinawa. In fact, the recognition system also grants certification as “Partner facilities” if the businesses don’t focus on tourist information but willingly provide local information to foreign visitors in a neutral and fair manner (JNTO, 2013c). However, Okinawa doesn’t have any partner facilities so far (JNTO, 2013c).

Concerning the situation of tourist information center in Okinawa, tour agencies interviewed want Okinawa to have some of those information centers at major tourist places easy to find for foreign tourists (UJT, 2013). In Germany, multilingual tourist information centers are located at the near the heart of major cities (MRG, 2013). In London, there are many guideboards here and there, and those boards have information on surrounding area, major spots, and estimated arriving time to the spots (UJT, 2013). Regarding tourist information center in London, there are 17 offices in the city (London Tourist Information Centre [LTIC], 2013). At these information centers, visitors not only can collect variety of information including free maps and leaflets of tourism activities, but can buy various tickets for shows, transportations, and so on (LTIC, 2013). Although depending on the office size, the London office always has 4 attendants, and has 1,000 to 3,000 visitors a day (LTIC, 2013). These information centers are operated by the NPO “London & Partners” which has been founded by tourism industry and city of London with the purpose of promotion of London (LTIC, 2013). The website “London” (<http://www.visitlondon.com/>) is multilingual and content-rich. Of course, the maps and leaflets are also in different languages.

Fig. III-2-1. London Information Center



Fig. III-2-2. Inside of London Information Center



Fig. III-2-3. Tourists Looking at Tourist Guideboard



Fig. III-2-4. Tourist Guideboard (London)



As it was mentioned above, many of the Westerners have “high-tech” image to Japan. On the other hand, Okinawa prefecture promotes IT industry. In keeping with these facts, Okinawa should develop tourist information service for foreign tourists with IT technology. As possible information services, providing free Wi-Fi access, real-time information on transportation, multilingual guidance of tourist spots and facilities are promising. In fact, Tokyo implements a similar project, which is named “Tokyo Ubiquitous Technology Project”. The project pursues the goal of the ubiquitous computing society in which necessary information can be accessed by “anyone, anytime, anywhere” by using ultramodern IT technologies such as IC tags (Tokyo Ubiquitous Technology Project [TUTP], n.d.). This project allows people with smartphones to get their current location, information on nearby shops and events, and even a tour-guide in 4 languages by just holding their smartphones over the panels with “ucode” (Inoue, 2012). In July 2012, Japan Airlines, Yahoo Japan, and Dai Nippon Printing also conducted the joint implementation in Okinawa; they created posters with ucode which opens the “JAL Okinawa application” that gives people tourist information and traveling tips by holding smartphones over the poster (Yahoo Japan, Dai Nippon Printing & Japan Airlines, 2012). The realization of those services is definitely needed for the future of the Okinawa tourism.

Fig. III-2-5. The Panel with ucode (Ginza)



*Inoue (2012) “Verification Test of NFC Tag” (NFC タグを利用した実証試験)

Fig. III-2-6. The Poster with ucode (Okinawa)



*Sekiguchi (2012) “The Nose of Jumbo 747...” (ジャンボ機 747 の鼻を…)

Okinawa should improve the response capabilities to foreign visitors of not only tourist facilities but also restaurants, bars, souvenir shops, etc. where tourists visit. Many of foreign visitors know that Japanese education system requires students to learn English. Furthermore, since Japanese people, especially Okinawans, are familiar with American culture, foreign travelers tend to expect many Okinawans can speak English at some level (IJST, 2013). However, according to the result of the survey, 52 percent of Western visitors to Okinawa satisfied with the ability of foreign language and 24 percent of them felt unsatisfied with it. As a result of another survey, which was conducted by Okinawa prefecture, 40 percent of foreign respondents (mostly Asians) were satisfied with Okinawans’ ability of foreign language, and 11 percent of them were unsatisfied with it (ODCTS, 2012d). Thus, the response capability to foreign visitor of Okinawa is not enough and has to be improved.

In this regard, however, even to most of foreign tourists, English is a second language. Therefore, those foreign tourists don’t expect advanced English skill to Okinawan (JALPAKF, 2013). Also, Okinawans are very kind and they try to deliver what they want to tell to foreigners by gesture (IJST, 2013). This Okinawans’ warm personality is one of Okinawa’s enticements (IJST, 2013). But, it would be much better and helpful if the

facilities, shops, and restaurants which foreign tourists stopping by have staffs who can speak at least English or have English signs or menus (UJT, 2013). Since most of European cultures don't have custom of eating raw fish like Japanese, it is quite challenging to order the dishes with unknown ingredients and methods of food preparation (IJST, 2013). Comparing to Japan, there is also a big population of vegetarian/vegan and people who are required diet restriction for some reasons in the Western countries (IJST, 2013). Now, therefore, not having the means to explain the menu in foreign languages is a very big issue for the restaurant business in Okinawa (IJST, 2013). As countermeasures for this issue, simple actions, such as preparing English menu or electronic dictionary, could improve the situation.

The popularity of Japanese food is edging up in the Western countries, but it doesn't mean people in those countries want to eat Japanese food every day (MRG, 2013). In fact, as the result of the survey to German tourists who have been to Okinawa, there were comments that they didn't have enough alternatives for meals in Okinawa (JNTOF, 2013). Europeans are best remembered as gastronomists and, actually, some Europeans are very particular in their tastes (JNTOF, 2013). But there are also some German people, who are fine with frugal meals (e.g. bread, ham, and cheese) (JNTOF, 2013). Those people, as long as they can share a communal kitchen, might choose preparing their own meals rather than having unfamiliar Japanese food every day (MRG, 2013).

On a related topic, there is another tourism challenge; there are only few alternatives for nightlife in Okinawa (JNTOL, 2013). In the case of beach resorts in other countries, many of those destinations have a lot of hotels, restaurants, bars, and other spots in a walking distance (JNTOL, 2013). Since many of Western tourists desire to enjoy nightlife sometimes during their vacations, tour agencies want to know if there are more alternatives such as bars and dance clubs with an Okinawan atmosphere (UJT, 2013). However, it is understandable that the local people try to avoid having nightlife spots in their area because it could disturb the neighborhood (JNTOL, 2013). As one of solutions, local government and communities should consider the chance of dividing residential area and entertainment area clearly.

Some of the challenges mentioned in this part seem to be related to negligence of the need to have foreign tourists, or maybe, related to insecurities of interacting with foreign tourists; there could be some merits, such as increase in income, and demerits, such as change in living environment, if the local areas have more tourists (not only foreign tourists, actually). The local governments, including Okinawa prefecture and municipalities, and interested organizations have to provide their people with information on the effect of tourism industry, and let them choose what they really want.

Table.III-2-5. Other Facilities & Services in Okinawa

Other Facilities & Services in Okinawa	
<ul style="list-style-type: none"> • foreign travelers need correct local information <ul style="list-style-type: none"> → A few tourist information centers offer multilingual service • London has 17 information centers with multilingual service • Guideboards for tourist are here and there in London • Information service with cutting-edge IT can lead to new era? • Some say Okinawans' hospitality covers their lack of language ability, but some say English skills are not enough • Few alternatives for nightlife <ul style="list-style-type: none"> → Other resorts have a lot of nightlife spots → Attractive nightlife is important for the Western 	<ul style="list-style-type: none"> • Response capability to foreign visitors is very important for the food industry <ul style="list-style-type: none"> → Difference in culture and religion → Menu with English descriptions and pictures → Preparing basic dialogs in English and electric dictionary • Some communities and businesses avoid to have foreign visitors <ul style="list-style-type: none"> → Need to understand merits and demerits to have foreigners → Governmental effort is required for zoning

< Transportation System >

To attract Western tourists, Okinawa also has to deal with transportation its condition. When people move to Okinawa, every one of them has to take airplanes or vessels from other major cities in Japan since there is no regular flight between Okinawa and Western countries. In main island of Japan, travelers can use “Japan Rail Pass” and the pass enable travelers to go almost everywhere in Japan except Okinawa (JALPAKF, 2013). To visit Okinawa, visitors have to take flights again, have to pay more, and have to make time to transfer to the southern islands. This fact strongly affects to the Western travelers’ decision if they go to Okinawa. In addition, depending on the flight schedules, they have to spend an extra night in the city near international airports they arrive in Japan before/after transferring to Okinawa (JALPAKF, 2013). As a matter of fact, although it is under given conditions, as long as passengers set their final destination as Okinawa when they purchase their tickets, they don’t have to pay extra to get to Okinawa (MRG, 2013). Even if travelers purchase tickets separately, Japanese airlines offer 10,000 yen one-way tickets to anywhere in Japan for visitors from foreign countries (MRG, 2013). Considering these conditions, tours to Okinawa should be sold in sets with tours to Tokyo, Osaka and other cities in the main island of Japan (JNTOF, 2013). However, there is another way to promote Okinawa for the Western market; with maximizing its geographical merit, Okinawa can bring in Western tourists by way of Taiwan, China, or Korea. Indeed, some tour agencies introduce Taiwanese airlines to get to Okinawa and other cities in Japan via Taiwan since Okinawa has many flights between Taiwan (JNTOF, 2013). Thus, by cutting down the time and money to get to Okinawa, Okinawa might be able to have more tourists from Western nations.

Another issue of Okinawa tourism is the inter-islands transportation conditions. It is comfortable to drive cars when people go out for sightseeing, but not few people might feel uncomfortable left-hand traffic and might be bothered to obtain international driver’s license before the trip (JNTOF, 2013). When it comes to city bus, it is very difficult to take them because of language barriers and complicated routes (JNTOF, 2013). Additionally, the bus trip from Naha to towns in North takes a few hours and around 3,000 yen for one way (JNTOF, 2013). There are some special tickets that allow unlimited travel in Okinawa (JNTOF, 2013). The bus companies should make their services more approachable and accessible for foreign travelers (JNTOF, 2013). When the Western visitors try to get to remote islands of Okinawa, which also have beautiful natures and attractive cultures, they might find difficulties in traveling to there (JNTOL, 2013). Regarding the islands which can be reached by airplanes, the airfare can be expensive and the number of flights is limited. As to tiny islands which require people to take ferries from the main island, the lack of skill in dealing with foreigners at ferry landings might make travelers feel nervous (JNTOF, 2013). For the high-end customers, city bus and public ferry can’t be alternatives; more private boat or helicopter services are required (JNTOL, 2013).

Table.III-2-6. Transportation System in Okinawa

Transportation System in Okinawa	
<ul style="list-style-type: none"> • No direct flight from the Western nations • Connection at Tokyo, Osaka or other city is required <ul style="list-style-type: none"> → Have to spend extra night in other city in Japan → Can’t use Japan Rail Pass in Okinawa → 10,000 yen tickets are available for foreign tourists → Depending on the condition, no extra payment is needed → Can be get to Okinawa from neighboring Asian nations → Rental cars: left-hand traffic, Intl driver’s license 	<ul style="list-style-type: none"> • Difficult to use city bus <ul style="list-style-type: none"> → Language barrier and complicated routes → Time and money consuming, unpredictable traffic jam • Transportation to remote islands <ul style="list-style-type: none"> → Expensive airfare and limited numbers of flights → Lack of skill of dealing with foreigners at ferry landings → Development of websites for foreigners are required → Private boat and helicopter services for high-end customers

< Other Tourism Related Aspects >

On the subject of tourism promotion in the European market, other countries' strong marketing strategies are distinctive. However, JNTO London office and OCVB strive to get attentions from the world by broadcasting TV commercial of Okinawa tourism on BBC World News (JNTOL, 2013). People in London also can find OCVB's posters along with other countries' commercials at TUBE (subway) stations. Still, the visibility of Okinawa tourism is not enough to get customers yet when comparing Okinawa to India, Malaysia, or Turkey, which promote their own beach destinations by TV commercials on the key TV stations (JALPAKF, 2013).

Fig. III-2-7. OCVB's Poster at Subway Station (London)



Fig. III-2-8. Commercial Movie at Subway Station (London)



With respect to the acceptance of tourism journalists from European nations, JNTO offices have effectively implemented related measures with OCVB's support, and Okinawa's attraction has successfully delivered to the market (JNTOF, 2013). For the future, the tourism businesses in Okinawa should deal with those requests from media not passively but actively. Even if Okinawa prefecture doesn't have enough of a budget to accept media from the Western markets, municipalities and private sectors might be able to secure a sufficient budget to promote their own area in those markets. The tour agencies in the market are willing to cooperate with Okinawan municipalities and tourism businesses (MRG, 2013). Those municipalities and businesses in Okinawa should take into consideration their alliance with tour agencies in Europe, which have knowledge of the market.

In 2012, International Tourism Fair was taken place in Berlin. The booth of Okinawa featured with scuba diving got attentions from participants (JNTOF, 2013). Okinawa should keep make presentations at those events on a continuous basis to improve its visibility in the market (JNTOF, 2013). Other countries' tourist destinations sometimes have small events on street corners, and these types of promotions seem like they are very effective, too (JALPAKF, 2013). There are many ways Okinawa can think of as its own effective promotions.

Specifically, as to the promotion for the US market, creating positive word of mouth about Okinawa can be effective way since Okinawa has big American population who work for the military bases (JNTOF, 2013). According to the survey result conducted by JTA, not only US citizens but other countries' respondents think relatives and acquaintances who have been to Japan are the most useful information resource (JTA, 2013b). Considering this type of promotion, Yoshikazu Higashi, President of Okinawa Tourist Service [OTS] presented his idea of word of mouth strategy using internet at the symposium (NIAC, 2013). Thus, aggressive

promotions are expected to Okinawa tourism businesses.

Table.III-2-7. Useful Information Resources (Before Traveling)

	UK		Germany		France		Russia		US		Canada		Australia		Total	
	Means	%	Means	%	Means	%	Means	%	Means	%	Means	%	Means	%	Means	%
1位	Relatives/Acquaintances in Japan	38.8%	Internet (Others)	42.4%	Relatives/Acquaintances in Japan	36.4%	Internet (Others)	42.9%	Relatives/Acquaintances in Japan	43.2%	Relatives/Acquaintances in Japan	40.3%	Relatives/Acquaintances in Homeland	42.2%	Internet (Others)	31.0%
2位	Internet (Others)	34.7%	Relatives/Acquaintances in Japan	33.0%	Internet (Others)	31.1%	Relatives/Acquaintances in Homeland	31.0%	Internet (Others)	36.0%	Internet (Others)	37.6%	Internet (Others)	38.8%	Personal Blogs	23.1%
3位	Lonely Planet	33.8%	Relatives/Acquaintances in Homeland	23.7%	Lonely Planet	30.4%	Relatives/Acquaintances in Japan	29.2%	Relatives/Acquaintances in Homeland	29.6%	Relatives/Acquaintances in Homeland	27.4%	Lonely Planet	37.7%	Relatives/Acquaintances in Japan	21.4%
4位	Relatives/Acquaintances in Homeland	25.7%	Travel Guidebook (Others)	18.8%	Relatives/Acquaintances in Homeland	25.8%	Travel Guidebook (Others)	14.6%	Hotels' Websites	19.9%	Lonely Planet	21.9%	Relatives/Acquaintances in Japan	36.8%	Relatives/Acquaintances in Homeland	18.9%
5位	Hotels' Websites	21.0%	Lonely Planet	15.5%	Travel Guidebook (Others)	24.8%	Personal Blogs	14.5%	Lonely Planet	18.5%	Hotels' Websites	21.7%	Hotels' Websites	31.1%	Nothing Special	16.5%

	Korea		Taiwan		Hong Kong		China		Thailand		Singapore		Malaysia		India	
	Means	%	Means	%	Means	%	Means	%	Means	%	Means	%	Means	%	Means	%
1位	Personal Blogs	37.5%	Personal Blogs	34.1%	Internet (Others)	29.3%	Internet (Others)	26.7%	Internet (Others)	40.5%	Internet (Others)	31.1%	Internet (Others)	35.4%	Internet (Others)	38.9%
2位	Internet (Others)	35.4%	Tour Agencies' Websites	23.9%	Personal Blogs	25.4%	Relatives/Acquaintances in Japan	19.0%	Relatives/Acquaintances in Homeland	28.2%	Relatives/Acquaintances in Homeland	25.1%	Relatives/Acquaintances in Japan	29.7%	Relatives/Acquaintances in Japan	36.5%
3位	Travel Guidebook (Others)	18.4%	Internet (Others)	22.9%	JNTO Website	25.3%	Tour Agencies' Leaflets	17.6%	Relatives/Acquaintances in Japan	22.3%	Hotels' Websites	20.4%	Relatives/Acquaintances in Homeland	29.0%	Relatives/Acquaintances in Homeland	30.0%
4位	Relatives/Acquaintances in Japan	14.7%	Tour Agencies' Leaflets	21.7%	Hotels' Websites	21.8%	Relatives/Acquaintances in Homeland	15.9%	Travel Guidebook (Others)	20.8%	Relatives/Acquaintances in Japan	19.7%	Hotels' Websites	19.8%	You Tube	10.4%
5位	Relatives/Acquaintances in Homeland	11.5%	JNTO Website	18.1%	Tour Agencies' Websites	18.9%	Tour Agencies' Websites	15.1%	JNTO Website	12.4%	JNTO Website	19.4%	Tour Agencies' Leaflets	18.0%	Travel Guidebook (Others)	10.1%

*JTA (2013b) Consumption Trend of International Visitors (訪日外国人消費動向調査 平成 24 年年次報告書)

In association with tourism promotion, there are some requests from tour agencies in Europe to tourist businesses in Okinawa. Tour agencies in Europe have knowledge of the best travel season in Okinawa, but they don't know detailed information: They have to know which month's which week is crowded with domestic tourists, what kind of events will be taken place, and so on. If the European tour agencies can build a relationship and the communication system with Okinawan tourist businesses, and can have real-time information on Okinawa tourism, they would be able to recommend Okinawa to European tourists (MRG, 2013). At the same time, as it was mentioned in former section, information on accommodations, surrounding facilities, local agents and tour guides who can deal with foreign visitors in Okinawa are absolutely insufficient. The tour agencies in the UK and Frankfurt, which had cooperated as interviewees, are willing to consult with tourism businesses in Okinawa. Therefore, positive approaches from Okinawan businesses are strongly expected.

When a community tries to attract foreign visitors, the community will be required to understand differences with visitors to accept those people who have different cultures and lifestyles. It doesn't mean that the community necessarily has to change what it has. But the community should try to lead foreign visitors to be able to adapt to the local style. As a specific example, the Ryokan "Sawanoya" in the old town of Tokyo is famous for this successful model. The Owner of Sawanoya, Sawa revived not only his own business but also surrounding businesses by attracting foreign tourists to the town (JNTOF, 2013). What he did was very simple and took quiet dedication; he went around asking surrounding businesses and tourist sites to prepare simple English set menus, descriptions, and maps of the area (JNTOF, 2013). By his and local businesses' efforts, the area could get a lot of positive word of mouth from foreign travelers through the Internet (JNTOF, 2013). This example should draw attention from tourism businesses in Okinawa because it is a successful example of the collaborative relationships among local businesses, the community could keep their own style, and the success was achieved by the local community's effort without governmental supports. A similar story happened in Hakuba village in Nagano. Hakuba is known as part of the host city of the Nagano Olympics. The decreasing number of winter sports population has slowed down the tourism business in Nagano (Suzuki, 2009). To revive local economy, the local businesses decided to attract visitors from Australia. They set up "Hakuba Tourism" which is a consociation of local accommodation owners, and the consociation successfully attracted the target

market by the services through the eyes of Australian customers with some governmental supports (JNTOF, 2013). Among the members of the consociation, there are different sizes of businesses from mom-and-pop B&B to nation-wide hotel chain, so it was very hard to work together (Suzuki, 2013). They only have simple rules such as all of accommodations have to deal with customers in English at some level and have to make every effort to keep natural landscape (Suzuki, 2013). They also have put money based on the scale of the business for the concerted promotion activities (Suzuki, 2013). By these efforts, Hakuba succeeded in building its visibility in its target market, and it couldn't have happened without the cooperation of local businesses (Suzuki, 2013).

Regarding Okinawa's measures to attract foreign tourists, same movements with "Sawanoya" and "Hakuba" cases are expected to occur. There have to be local efforts like those examples besides governmental support to get attentions from their target market. According to Toru Takimoto, General Manager of Regional Development Department of JTA, Ministry of Economy, Trade and Industry started the program "Key Person Meeting" (NIAC, 2013). The meetings are held in communities across Japan, and the government supports the efforts by local business leaders to develop their economy (NIAC, 2013). Okinawan tourism businesses also should organize the meeting and get support from the government.

To develop the strong tourism strategy to attract Western travelers, not only municipalities and tourism businesses, but also every one of people in Okinawa have to re-acknowledge the fact that tourism industry has crucial relationship with local communities much stronger than other industries since its value is determined by people, culture, nature, and communities. Also, since the regional development with tourism industry can only be achieved by increasing in the number of tourists by the efforts of local communities, the local communities have to understand what they can offer to tourists and what tourists expect from them. With that understanding, the local communities could be chosen as tourist destinations by developing attractive tourism resources with municipalities and businesses. The communities also have to realize that there are possibilities that local communities might be negatively affected by increasing the number of tourists in the form of environmental destructions, losing their own identities by popularization, change in dwelling environment by mixing up residential area with tourism area, besides the positive effects such as stimulating local economies. To avoid those negative effects, municipalities and related organizations should strive to ask the local residents to understand both positive and negative effects on the communities by tourism businesses, and play active roles in institutional design, land use zoning, and other public affairs activities.

Regarding the introduction of Integrated Resort to Okinawa, it seems that the casino gaming doesn't strongly appeal to the Western market. First of all, casino is not special tourism attraction to people in the market since many of countries already have casino businesses (JNTOL, 2013). If Okinawa could invite huge casino businesses like Las Vegas and could have other entertainments, Okinawa might be able to attract higher socioeconomic group and might be able to improve the response capabilities to foreign visitors dramatically, although it is an extremely improbable scenario. Now, almost the only thing known for certain is that casino can't be the last resort for Okinawa tourism (JNTOF, 2013). Incidentally, although there are criticisms that casino disturb the peace of community, the theory doesn't necessary hold true in this case: There are studies which show the increase in the number of population lead to the increase in the number of minor offences, so even if the communities could have more tourists without casinos, it doesn't mean those communities could

secure their public orders (JNTOL, 2013). Yet, if the community was not sure if it really wants to have casino, then it doesn't have to introduce casino (JNTOL, 2013). There are also opinions that, considering the penetrating the Western market, Okinawa would better focus on creating foreigner-friendly towns rather than introducing casino gaming. For example, improving transport accessibility to/in Okinawa and information communication environment are very important to accept more tourists. There will be more arguments over the introduction of casino gaming to Okinawa. The important thing is people shouldn't have excessive anxiety or expectation about casino businesses, and clarify, in a non-emotional manner, what the target market is, if there are possible business partners, and what is the best strategy for Okinawa tourism from the mid to long term point of view of politics, the economy and society.

Table.III-2-8. Other Tourism Related Aspects in Okinawa

Other Tourism Related Aspects	
<ul style="list-style-type: none"> • Promotion of Okinawa tourism is ongoing in Europe <ul style="list-style-type: none"> → Broadcasting TV-CM on BBC World News (JNTO London Office) → Made a presentation featured diving at International Tourism Fair (JNTO Frankfurt) → Tour agencies in Europe fell Okinawa's visibility is low • Acceptance of tourism journalists from Western countries <ul style="list-style-type: none"> → Has been effectively accepting them with OCVB's support → Need to invite them actively → Municipalities and private sectors' effort is expected • Building up business relationships between tourism businesses in Okinawa and tour agencies in Western nations <ul style="list-style-type: none"> → Provision of information to the tour agencies (operational status of hotels, surrounding environment, seasonal tourist information, and upcoming events) 	<ul style="list-style-type: none"> • Improving preparations to accept foreign tourists <ul style="list-style-type: none"> → Understandings towards foreign culture → Lead foreign visitors to be able to adapt to the local style → Examples of "Sawanoya" and "Hakuba" • Tourism industry has crucial relationship with local communities <ul style="list-style-type: none"> → Matching between what communities has and what visitors want → Tourism consumes natural resources, living climate, etc. → Municipalities' roles are very important on developing tourism strategies • Introducing casino gaming to Okinawa <ul style="list-style-type: none"> → Doesn't strongly appeal to the Western market → Calm discussion is required

IV. Add-Up

In the beginning of this report, three important key metrics for tourism industry of Okinawa, "increase in the number of incoming tourists", "increase in the average length of visitors' stay", and "increase in the tourist consumption per-capita", were brought up. In addition, this report confirmed that Okinawa has to increase the number of incoming tourists not only from domestic market but also from foreign markets to improve those key metrics. Furthermore, this paper shared the recognition that Okinawa tourism should give attention to the Western markets besides Asian markets from a point of view of market expansion and risk diversification.

To attract Western travelers, Japanese government has taken measures such as conducting promotional activities in the markets, developing new tourism resources, and strengthening the system of accepting foreign visitors under "Visit Japan Campaign". In accordance with the Japanese government's tourism policy, Okinawa prefecture has been developing its own brand image called "Be Okinawa" and decided to aim it towards foreign markets including the Western markets.

To discuss the concrete measures to attract the Western travelers, the literature research, the questionnaire surveys on the Okinawa tourism to the Western people who have experiences to visit Okinawa, and the interview research to tourism businesses in European nations were conducted. After those researches, there were some findings: Many of Western travelers to Okinawa also visit to "Golden Route" on the main island of Japan, which includes Tokyo, Osaka, Kyoto, and Nara. Those Western travelers look for a stereotyped

true Japan experience. The visibility of Okinawa, especially, cultural aspects of Okinawa, is relatively low. During their stay in Okinawa, Western travelers visit not only the main island of Okinawa but Ishigaki island, Miyako island, and even small islands such as Tokashiki island. Their expectation from Okinawa is to have interactions with local people, see the beautiful ocean, and experience unique cultures including food. In these areas their satisfaction level is relatively high. However, some improvements are expected: The lack of language skill and inefficient transportation systems are pointed out. To attract more visitors from the Western nations, Okinawa should emphasize cultural aspects and nature experiences.

On receiving the results of researches above, this paper makes two long-term proposals and three short-term proposals to attract Western travelers to Okinawa.

Firstly, as the proposal that requires long-term governmental supports, Okinawa should clarify its positioning of tourism in the market and develop its own unique brand image. Okinawa's visibility as tourist destination in the Western market is relatively low. Even as a beach resort destination, Okinawa's competitiveness is low against resorts in other countries. At this time, Okinawa should develop its tourism strategy in combination with popular cities such as Tokyo and Osaka as a part of Japan with its cultural distinctions. For instance, Okinawa can contrast its Asian influenced Ryukyu Dynasty culture with Edo culture of Tokyo and poised Kyoto culture, and offer tours trying out differences in streetscapes, food, and traditional arts. In addition, Okinawa also can offer its subtropical charm. However, Okinawa has not developed its culture and natural resources as tourism resources for the Western market, so it has not been able to deliver its enticement to the market. As the tours for the Western market, cultural experience based tours and nature experience based tours are promising. For this to happen, Okinawa has to secure qualified human resources who have enough knowledge of Okinawan culture/natural environment and also can deliver their knowledge to international visitors in foreign languages.

The second proposal, which needs long-term support, is to implement land use zonings for sustainable economic development of communities that have tourist spots. Today, most of tourist areas in Okinawa have not been adjusted from the point of view of tourism. As President Higashi of OTS pointed out, almost nothing which can introduce Okinawan traditional cultures has left and rebuilt after the WW2 (NIAC, 2013). Furthermore, tourist facilities, historical heritages, commercial districts, and residential areas are not segmented in efficient ways. As long as tourists come and go to consume the tourism resources, the natural environment, culture and living environment will keep changing. To develop tourism industry in a sustainable way without losing dignity and originality, local communities have to examine each situation they have carefully, take what is good and leave what is bad, and re-organize their own land-use. By doing so, the communities can direct tourists to where the communities want to, develop their economies, and protect their tourism resources and people's living. To conduct zoning of the communities, the strong leadership of municipalities and local businesses is required; with the strong leadership, they have to help local people to understand pros and cons of developing tourism and ask for people's cooperation. This is the only way to develop the true Okinawa tourism.

As a countermeasure to attract the Western tourists, which can be dealt with by private sectors including small businesses, the next three approaches are suggested. At first, tourist facilities, accommodations, bars/restaurants, transportation system have to improve their response capabilities to foreign visitors; at least,

they have to be able to explain about their own services and products in English in some way. To most of businesses, improving employees' language skills have to be mid-term to long-term approach. But, to most of businesses, their main services and products might not be going to be changing often. Those basic, essential, and not-frequently-changeable things, such as routine menu, precaution statement, safety information, and neighborhood map, can be prepared by paper in English. Communication in broken English with electronic dictionary also can help mutual understanding. These simple efforts might be able to improve the satisfaction level of foreign tourists. Those local businesses also can provide information on their websites in English beforehand to avoid confusion on site. By doing so, the businesses can send their information before tourists come to Okinawa and improve their ability to pull in customers. These small efforts will be differentiations and enhancement of competitiveness of their businesses among other organizations of a like nature.

As a second proposal for tourism businesses, the business partnerships between tour agencies in the target markets and Okinawan tourism businesses have to be developed. Under existing conditions, tourism business in Okinawa cannot figure out what customers want because of geographical, cultural, and economic differences. The market also cannot get information about what Okinawa offers due to same reason. It is not easy to bridge the gap between businesses in Okinawa and the Western market, because most of businesses in Okinawa don't have enough resources such as money and knowledge to deal with the issues all by themselves. The tour agencies in the target market also have same challenges in developing attractive package tours, since they don't know who should be the one to contact in Okinawa. Now, businesses in Okinawa shouldn't be passive but be active to this situation; the businesses in Okinawa should contact ahead of competitive businesses, exchange necessary information, and steadily acquire travelers who were sent by the business partners in the target market.

Lastly, building up the alliances among local businesses is recommended. In particular, by collaborating each other with tourism businesses in the same area, those businesses should develop their own unique tourism resources effectively and send their information positively. As it was mentioned above, tourism business and local communities can't be separated, and because of the nature, not only the disjointed efforts can't improve their abilities to attract travelers but the unorganized activity burn out their tourism resources wastefully. By staying out of unreasonable competition among local businesses and connecting the disaggregate information which have been sent individually, and sharing the expense to develop, preserve, and promote their tourism resources, all of small businesses in the same community can improve their businesses. By this strategy, the improvement of response to foreigners and the building up business partnerships also can be achieved effectively.

Through the research, the fact was found that the basic information on tourists from the Western countries is very limited and not enough to discuss effective measures to attract tourists from those countries. Since Okinawa is the isolated islands, the number of incoming visitors is easy to capture comparing to other prefectures; almost all of visitors come to Okinawa by commercial airplanes and vessels, so they are countable. However, in terms of the number of foreign visitors, except neighboring Asian countries which are connected to Okinawa by direct flights, they are hard to entice because most of them fly to major international airports such as Narita and Kansai, and then transfer to Okinawa by domestic flight. Therefore, those visitors are counted as domestic visitors, not foreign visitors. In the same way, Okinawa also can't canvass the number of

foreign visitors who visit surrounding islands. These difficulties in getting basic information on foreign tourists make it harder to gain better understanding of foreign tourists in Okinawa. For the future, NIAC will have to request cooperation of the government, Okinawa prefecture, and related organizations to conduct effective researches. At the same time, to take viable measures and to determine the effect of those measures, NIAC should also request to strengthen the tourism statistics. Lastly, as a local Okinawan think-tank, NIAC will continue its researches on this theme to put forward proposals to the challenges which were pointed out on this paper. Also, NIAC will strive to take a role as an intermediary among local industry, government and academia to advance the Okinawan economy.

Shigefumi Asage

Department II

Nansei Shoto Industrial Advancement Center

References:

- China Today (2011, January 4) 台湾への個人旅行、清明節に解禁へ. Retrieved from http://japanese.china.org.cn/business/txt/2011-01/04/content_21671615.htm
- Nansei Shoto Industrial Advancement Center (2013) 沖縄観光シンポジウム ヨーロッパ諸国からの誘客について 開催報告書
- Hahakura, O. (n.d.) 2つのコミュニティツーリズム事業の展開. JTB Communications. Retrieved from http://www.visitors.jp/vll/vii_r3.pdf
- Hyodo, R. & Oikawa, Y. (2013) 東日本大震災後の訪日台湾人観光客動向. Asia Pacific Institute of Research. Retrieved from <http://www.apir.or.jp/ja/research/files/2013/03/148.pdf>
- Inoue, S. (2012, March 13). [Web log message]. Retrieved from <http://s-max.jp/archives/1449393.html>
- International Okinawa Goju-ryu Karate-do Federation Yokohama division Ryurei-Kan (2012) 第6回剛柔流世界武道祭 2012. Retrieved from <http://gold.ap.teacup.com/ryurei/60.html>
- Into Japan Specialist Tours (2013, March 15). Interview by S Asage. Attraction of foreign tourists to Okinawa.
- JALPAK Frankfurt Office (2013, March 19). Interview by S Asage. Attraction of foreign tourists to Okinawa
- Japan National Tourism Organization (2012) 外国人に日本への旅行を売り込む!. Retrieved from http://www.nihon-kankou.or.jp/home/committees/report/event/20121002_2b.pdf
- Japan National Tourism Organization (2013a) 訪日外客の動向. Retrieved from http://www.jnto.go.jp/jpn/reference/tourism_data/visitor_trends/cq6g7o0000027zc0-att/2013_tourists.pdf
- Japan National Tourism Organization Frankfurt Office (2013, March 19). Interview by S Asage. Attraction of foreign tourists to Okinawa
- Japan National Tourism Organization London Office (2013, March 14). Interview by S Asage. Attraction of foreign tourists to Okinawa.

- Japan National Tourism Organization (2013b) JNTO 認定外国人観光案内所(ビジット・ジャパン案内所)
Retrieved from http://www.jnto.go.jp/jpn/reference/visitor_support/useful/tic.html
- Japan National Tourism Organization (2013c) ビジット・ジャパン案内所 一覧表. Retrieved from
http://www.jnto.go.jp/jpn/reference/visitor_support/tic/list.html
- Japan Tariff Association (2012) 週間為替相場 主要 19 カ国. Retrieved from
<http://www.kanzei.or.jp/check/rate/rate2012.htm>
- Japan Tourism Agency (2011) 訪日外国人の消費動向 平成 22 年 年次報告書. Retrieved from
<http://www.mlit.go.jp/common/000139531.pdf>
- Japan Tourism Agency (2012a) 観光庁設立の経緯. Retrieved from
<http://www.mlit.go.jp/kankocho/about/setsuritsu.html>
- Japan Tourism Agency (2012b) 観光立国推進基本計画. Retrieved from
<http://www.mlit.go.jp/kankocho/kankorikkoku/kihonkeikaku.html>
- Japan Tourism Agency (2013a) 共通基準による観光入込客統計. Retrieved from
<http://www.mlit.go.jp/kankocho/siryoutoukei/irikomi.html>
- Japan Tourism Agency (2013b) 訪日外国人の消費動向 平成 24 年 年次報告書. Retrieved from
<http://www.mlit.go.jp/common/000992929.pdf>
- Japan Tourism Agency (2013c) 観光立国の推進と訪日外国人受入の取組について. Retrieved from
http://www.niac.or.jp/katudo/kouen/130305_kankocho.pdf
- Jiji Press (2013) 航空自由化(オープンスカイ). Jiji.com Retrieved from
<http://www.jiji.com/jc/zc?k=201303/2013033100119&g=eco>
- Kubo, A (2012) 「観光立国」に資する欧米系外国人の観光行動論 —大阪市、高野町、田辺市の事例を
参考に—. eJournal of Creative Cities. Retrieved from
<http://creativecity.gssc.osaka-cu.ac.jp/ejcc/article/view/160/138>
- London Tourist Information Centre (2013, March 15) Interview by S Asage. Attraction of foreign tourists to
Okinawa.
- Miki Reisen GmbH (2013, March 19). Interview by S Asage. Attraction of foreign tourists to Okinawa.
- Ministry of Internal Affairs and Communications (2006) 観光立国推進基本法. 法令データ提供システム.
Retrieved from <http://law.e-gov.go.jp/htmldata/H18/H18HO117.html>
- Nagao, H. (2012) 中国人観光客の誘客に向けた銀聯カードの活用方策. Mitsubishi UFJ Research and
Consulting. Retrieved from
<http://www.tb.mlit.go.jp/chubu/kikaku/syoryudo/subcommittee-meeting/murc-card.pdf>
- Naha Airport Building (2013) 国際線航空スケジュール. Retrieved from
<http://www.naha-airport.co.jp/international/>
- Narita International Airport Cooperation (2013) ネットワーク・乗り入れ航空会社. Retrieved from
http://www.naa.jp/jp/airport/about_network.html#network
- New Kansai International Airport Company, Ltd. (2013, May) フライトスケジュール一覧. Retrieved from
http://flight.kansai-airport.or.jp/flight/all_search/index.aspx
- Nikkei (2012, August 16) 沖縄、7月の外国人観光客が最多 数次ビザなど効果. Retrieved from
<http://www.nikkei.com/article/DGXNZO45025170V10C12A8LX0000/>

- Nomura Research Institute (2011) 沖縄における世界水準の観光リゾートの形成に向けた調査報告書(概要編). Retrieved from <http://www.ogb.go.jp/sinkou/shinki/kankourizoto.pdf>
- OECD (2012), OECD Tourism Trends and Policies 2012, OECD Publishing. Retrieved from http://www.oecd-ilibrary.org/industry-and-services/oecd-tourism-trends-and-policies-2012_tour-2012-en
- Ogata, Y. (2011). 地域振興事例調査報告書. The Japan Research Institute for Local Government. Retrieved from http://www.rilg.or.jp/004/h22_15.pdf
- Okinawa Convention & Visitors Bureau (2013a) 平成 24 年度 外国人観光客向け多言語情報発信コールセンターについて. Retrieved from <http://www.visitokinawa.jp/oin/news/151>
- Okinawa Convention & Visitors Bureau (2013b) 沖縄観光国際化ビックバン事業・外国人観光客受入体制サポート構築事業 平成 25 年度 Wi-Fi 設置支援 受入態勢整備助成事業 実施要項. Retrieved from http://www.visitokinawa.jp/oin/sites/default/files/support_files/%E3%80%90%E5%AE%9F%E6%96%BD%E8%A6%81%E7%B6%B1%E3%80%91%E3%80%90Wi-Fi%E8%A8%AD%E7%BD%AE%E6%94%AF%E6%8F%B4%E3%80%91%E5%8F%97%E5%85%A5%E4%BD%93%E5%88%B6%E6%95%B4%E5%82%99%E5%8A%A9%E6%88%90%E4%BA%8B%E6%A5%AD.pdf
- Okinawa Prefectural Government Department of Culture, Tourism and Sports (2007) 平成 19 年度ビジッとおきなわ計画の策定について. Retrieved from <http://www.pref.okinawa.jp/site/bunka-sports/kankoseisaku/13763.html>
- Okinawa Prefectural Government Department of Culture, Tourism and Sports (2012a) 平成 23 年版観光要覧. Retrieved from <http://www.pref.okinawa.jp/site/bunka-sports/kankoseisaku/kikaku/report/youran/documents/h23kankoyoran.pdf>
- Okinawa Prefectural Government Department of Culture, Tourism and Sports (2012b) 平成 22 年版観光要覧. Retrieved from <http://www.pref.okinawa.jp/site/bunka-sports/kankoseisaku/25620.html>
- Okinawa Prefectural Government Department of Culture, Tourism and Sports (2012c) 沖縄県観光振興基本計画(第 5 次). Retrieved from <http://www.pref.okinawa.jp/site/bunka-sports/kankoseisaku/kikaku/report/policy/h24-33tourismpolicy.html>
- Okinawa Prefectural Government Department of Culture, Tourism and Sports (2012d) 平成 23 年度 那覇空港観光案内所(国際線) 機能強化事業 外国人観光客満足度調査 報告書. Retrieved from <http://www.pref.okinawa.jp/site/bunka-sports/kankoshinko/ukeire/documents/h23manzokudotyousa.html>
- Okinawa Prefectural Government Department of Culture, Tourism and Sports (2013a) 暦年 平成 24 年入域観光客統計概況. Retrieved from <http://www.pref.okinawa.jp/site/bunka-sports/kankoseisaku/kikaku/statistics/tourists/h24-tourists.html>
- Okinawa Prefectural Government Department of Culture, Tourism and Sports (2013b) 平成 25 年 5 月 15 日発表観光収入の修正について. Retrieved from <http://www.pref.okinawa.lg.jp/site/bunka-sports/kankoseisaku/documents/revise.pdf>

- Okinawa Prefectural Government Department of Culture, Tourism and Sports (2013c) 平成 25 年 4 月入域観光客統計概況. Retrieved from <http://www.pref.okinawa.lg.jp/site/bunka-sports/kankoseisaku/kikaku/statistics/tourists/documents/h25-4gaikyou.pdf>
- Okinawa Prefectural Government Department of Culture, Tourism and Sports (2013d) 国籍別入域観光客数 (平成 24 年) . Unpublished raw data
- Okinawa Prefectural Government Department of Culture, Tourism and Sports (2013e) 欧州からの観光客誘客について. Retrieved from http://www.niac.or.jp/katudo/kouen/130305_okinawaken.pdf
- Okinawa Prefectural Government Department of Culture, Tourism and Sports (2013f) 「官民一体」で、外国人観光客 200 万人へ＝沖縄県 沖縄グローバル観光ブランド「Be.Okinawa」を発表. Retrieved from <http://www.tourism.co.jp/be.okinawa.pdf>
- Okinawa Prefectural Government Department of Planning (2013) 沖縄 21 世紀ビジョン実施計画 (前期 : 平成 24 年度~28 年度). Retrieved from <http://www.pref.okinawa.lg.jp/site/kikaku/chosei/keikaku/documents/jissikeikaku-1.pdf>
- Oku Japan (2013, March 25). Interview by S Asage. Attraction of foreign tourists to Okinawa.
- Rowthorn, C., Bender, A., Crawford, L., Firestone, M., Hornyak, T., Milner, R., Presser, B., & Spurling, T. (2011). Lonely planet japan. (12th ed., p. 657). Hawthorn, Victoria/AU: Lonely Planet Publications Ltd.
- Ryukyu Simpo (2012) 「心休まる島」提言 海外向け沖縄観光、関係者が会議 Retrieved from <http://ryukyushimpo.jp/news/storyid-200429-storytopic-4.html>
- Sekiguchi, S. (2012, July 24) [Web log message] ジャンボ機「747」の“鼻”を使った NFC ポスター、沖縄で O2O 実験. Retrieved from http://k-tai.impress.co.jp/docs/news/20120724_548841.html
- State of Hawaii Department of Business, Economic Development & Tourism, (2012). 2011 annual visitor research report. Retrieved from Hawai'i Tourism Authority website: <http://dbedt.hawaii.gov/visitor/visitor-research/>
- Suzuki, M. (2009) 隠れた世界企業 スキーリゾートを「輸出」. Nikkei Business Online Retrieved from <http://business.nikkeibp.co.jp/article/topics/20090713/199998/?P=1>
- TISCO Japan (2013) 成田空港国際線早見時刻表／5 月. Retrieved from <http://www.tiscojapan.com/timetable/narita.html>
- Tokyo Ubiquitous Technology Project (n.d.) Retrieved from <http://www.tokyo-ubinavi.jp/>
- Unique Japan Tours (2013, March 14). Interview by S Asage. Attraction of foreign tourists to Okinawa.
- Yahoo Japan & Dai Nippon Printing & Japan Airlines (2012) 沖縄をもっと楽しもう！スマートフォン用アプリ「JAL 沖縄」の提供を開始. Retrieved from http://press.jal.co.jp/ja/bw_uploads/MjAxMjA3MjRfi6STr4OKg4qBW4NYX0pBTImrk+oucGRm.pdf

