Abstract
The importance of Islamic pilgrimage (Hajj) to Ka'aba in Makkah (Saudi Arabia) has not been recognised in the annals of contemporary research in international tourism. The annual pilgrimage to Makkah is a rite of spiritual renewal for the one billion Muslims (followers of Islam) worldwide. This paper, besides highlighting the importance of Hajj from an international tourism perspective, also offers some managerial comments to improve the quality of Hajj experience for visiting international Muslim pilgrims.

Zafar U. Ahmed

Introduction
Arrival of about one million international Muslim pilgrims at a given time from all over the world each year to perform annual pilgrimage to Ka'aba in Makkah (Saudi Arabia) represents an activity of enormous significance in the contemporary world economy. Transporting, accommodating, feeding, entertaining and providing the international Muslim pilgrims with all kinds of religious, health and shopping facilities for four to eight weeks is a gigantic exercise. It involves transfer of funds worth billions of dollars across the international borders each year. Such an exercise assumes more importance when analysed from the perspective of the mounting needs of contemporary international Muslim pilgrims ranging from international cuisine in small Saudi restaurants to giant supersonic jets. Goods and services worth billions of dollars are annually imported from abroad to cater to their needs because of their non-availability in Saudi Arabia. The preparations of annual Hajj start months in advance as a result of close cooperation between Saudi governmental
agencies, multinational corporations, and local private and public sectors.

**Literature review**

Islamic pilgrimage (Hajj) to Ka'aba in Makkah, Saudi Arabia, has been the focus of contemporary literature in disciplines such as geography (Rowley, 1989; Abdul-Rauf, 1978; Rowley and El-Hamdan, 1977; Rowley and El-Hamdan, 1978; Isaac, 1973; King, 1972; Shair, 1983; Brooke, 1987). The research carried out by Rowley (1989) led him to believe that the recent growth of the Hajj is a part of the continuity and indeed mounting ebullience and vitality of Islam. Continuing population growths and developments in transport technologies that present increasing opportunities to a widening number of Muslims are outlined and the various transport modes utilised by pilgrims are considered by Rowley (1989) in his paper. Brooke (1987) has examined the dynamics of transporting, slaughtering and disposing of about one million animals in Makkah on the eve of Hajj as an extra-ordinary exercise in logistics and management from geographical and ecological perspectives.

Despite the international travel by a million Muslim pilgrims from all over the world to perform their annual pilgrimage to Ka'aba annually and multi-billion dollar spending by them on their travel/pilgrimage, this important international travel/tourism activity has not received due recognition in the annals of contemporary travel and tourism research. Even international mass media avoids it and mentions it only when something unfortunate happens at the pilgrimage site. Reporting in global media of an airplane crash near Jeddah in June 1991, which killed hundreds of Nigerian pilgrims going back home from Saudi Arabia after pilgrimage, is a case in point. This is why this paper has examined the dynamics of Hajj from international tourism perspectives.

**Hajj in Islamic studies**

Hajj has been the focus of numerous studies carried out in the annals of Islamic studies (Sardar and Badawi, 1978; Long, 1979; Lewis, Pellat and Schacht, 1965; Kamal, 1961).

The Arabic word "Hajj" means "to set out for a definite purpose." Specifically, it refers to the pilgrimage to Ka'aba, which is situated in the city of Makkah (Mecca) in Saudi Arabia, and the performance of certain required observances during the months prescribed. The observances of Hajj are based on Islam's holy book - Qur'an (2:196-203, 5:98-1000, 22-27:32) and the practice of Prophet Muhammad and commemorate certain events in the lives of the prophet Abraham, his wife Hagar and their son, the prophet Ishmael (Ismael).

Hajj is obligatory at least once in a lifetime for any Muslim man or woman who fulfils the following conditions: at the time he/she intends to perform Hajj, he/she should be sane, in sound health, free from debts, and should have enough resources not only to defray his/her own travel expenses but also to take care of his/her dependents who have remained at home. It is a further condition that peace and security for his/her life and property exist on the way to Makkah and back. God says in the Qur'an: "And pilgrimage to the House [Ka'aba] is a duty people owe to God, for who can afford the journey" (Qur'an 3:97).

Following a 1400-year-old practice of their predecessors, about a million international Muslim pilgrims from all over the world (representing about 150 countries), along with about a million local Saudi Muslims, gather in Saudi Arabia every year to perform annual Islamic pilgrimage to Makkah, which is one of the five pillars of Islam. The first four pillars of Islam are:

1. **Shahada** (proclaiming that there is no god but God, and that Muhammad is the messenger of God),
2. **Salat** (the five times daily prayers),
3. **Zakat** (the giving of alms to the poor), and
4. **Sawm** (fasting throughout the holy month of Ramadan).

The fifth pillar of Islam, the performance of Hajj, is the ultimate aspiration of all Muslims, and the spiritual high point in the life of any Muslim, who has performed the holy rites.

The attainment of such spiritual fulfilment has been made steadily more accessible over the past half century to a large number of international pilgrims because of modernisation and improvements in the means of global...
transportation and communication.

Rites of Hajj

Ka'aba, being the focal point of Islamic pilgrimage, deserves some special but brief discussion. The word Ka'aba means "a cube-shaped structure." It refers in particular to the cube-shaped building in Makkah constructed of stone and mortar, measuring approximately 45 feet in height, 33 feet in width and 50 feet in length, which is generally covered with a black cloth decorated with Qur'anic verses, worked in gold.

Ka'aba is not a striking piece of art, nor is it adorned with precious stones. No pilgrim endows it with power to benefit or to hurt.

Before performing the Hajj, which takes place in the Holy Mosque in Makkah and in Mina, Muzdalifah and Arafat - which are localities adjacent to Makkah (see Figure 1) - the pilgrims must "enter into ihram." Literally meaning consecration, ihram is both the spiritual state a pilgrim must enter before embarking on the Hajj and the name of attire worn during the pilgrimage. It consists of two pieces of unsewn cloth for men and a simple dress for women. The simplicity of the pilgrims' clothing is meant to erase any material distinctions and also to symbolise that all are equal in the eyes of God.

After washing the entire body, the pilgrim dons the ihram and states the intention of performing the Hajj. The pilgrim then recites the words used by the prophet Abraham when he performed the first pilgrimage to the Ka'aba:

Here I am at your service, O Lord, here I am.
Here I am. No partner do You have. Here I am.
Truly, the praise and the favor is Yours, and the domain. No partner do You have.

Having entered into ihram and recited the above mentioned words, the pilgrim is then ready to begin the rites of the Hajj. On the first day of the rites of the Hajj, a day called the day of reflection, the pilgrims perform rites that date back to the prophet Muhammad's first of two pilgrimages to Makkah in March 629 A.D., when the pagan tribes of the city of Makkah had adopted Islam. In that year, prophet Muhammad visited the Ka'aba, which was originally built by prophet Abraham with the help of his son prophet Ishmael.

When completed, prophet Abraham was commanded by God to call mankind to make the pilgrimage to the Ka'aba. In later years, the inhabitants of the Arabian Peninsula continued to make the pilgrimage to the Ka'aba, although by then, they had transformed it into a centre of idol worship.

With the prophet Muhammad's arrival, the Ka'aba was purified of idols and once again became a centre for the worship of God. The Ka'aba was rebuilt and the Black Stone, which is the only piece of prophet Abraham's original shrine left, was placed in the southeast corner of the structure. It is in the direction of the Ka'aba that about one billion Muslims scattered throughout the world pray five times a day. However, neither the Ka'aba itself, nor the Black Stone, is an object of worship, but they symbolise a shrine.

Figure 1: The sites of the Hajj.
Table 1: Process of Performing Hajj

8th of Zul-Hijjah
1. Seven time circumambulation of Ka'aba on arrival in Makkah (optional),
2. Offer Hajj Prayer at the Station of Abraham in Ka'aba,
3. Drink water from the well of Zamzam,
4. Walk or run seven times between the hills of Safa and Marwah,
5. Leave for Mina (three miles from Makkah),
6. Offer whole day's five prayers at Mina,
7. Spend the night at Mina,
8. Move towards Arafat after sun-rise,
9. Face the direction of the Ka'aba and recite praises of God and offer supplication
   with up-raised hands,
10. Move towards Muzdalifah en masse after sunset,
11. Spend the night in Prayer and reflection at Muzdalifah,
12. Visit Al-Mash'ar Al-Haram (optional),
13. Walk through the valley of Batan Mohsar to get to a place called Gumrat-ul-
   Aqba,
14. Collect seven pebbles or small stones,
15. Stone the three Pillars of Satan while saying "God is Great",
16. Sacrifice an animal to commemorate prophet Abraham's sacrifice of a sheep,
17. Get hair cut (end of ihram),
18. Return to Makkah,
19. Perform the farewell circumambulation of the Ka'aba,
20. Visit prophet Muhammad's mosque in Madinah (optional).

9th of Zul-Hijjah

10th of Zul-Hijjah

Muslim pilgrims are required to perform their Hajj on the 8th, 9th and 10th of Zul-Hijjah (a month of Islamic calender) and follow a rigid itinerary of required sites and prayers. The process of performing Hajj is well laid out by Qur'an and prophet Muhammad. Every pilgrim is required to follow the entire well-structured process in letter and spirit with full dedication and devotion in order to fulfill his/her obligation towards God. Hajj guides are normally hired by pilgrims, who assist the visiting pilgrims in the performance of various rites of Hajj as outlined in Table 1.

Having performed the fifth, and final, pillar of their faith and devotion to God, the international Muslim pilgrims return to their homes with a greater spiritual strength. Many add the prefix Al-Hajj (pilgrim) to their names for the rest of their lives, and are afforded the added social respect for having performed the pilgrimage to Ka'aba.

Modernisation of pilgrim infrastructure

Whereas in the past, international Muslim pilgrims had to endure extreme hardships and absences of years from their homes to perform the pilgrimage, thereby limiting the number of those who could "make their way" to Makkah, Muslims from all over the world now visit Saudi Arabia each year in hundreds of thousands, exceeding the one million figure in recent years (see Figure 2). Such a concentration of international Muslim pilgrims/visitors from almost every nationality at the same place during the three prescribed days of the Hajj is the largest annual global logistical operation of its kind in the world. It has been made possible by Saudi Arabia's steady drive to establish a network of world-class infrastructure and facilities such as airports, roads, transportation, accommodation, and medical and other touristic services.

In the past, international Muslim pilgrims had to make an arduous journey to Makkah. Today modern international pilgrims land at the King Abdul Aziz airport in Jeddah, built at a cost of billions of dollars, exclusively to handle the hundreds of daily flights that bring international Muslim pilgrims to Saudi Arabia during the Hajj period.

In order to accommodate the rising number of pilgrims every year and cater to their needs in a better way, the Saudi government has embarked upon an ambitious multi-billion dollar expansion project of the two holiest sites of Islam, the Holy Mosque in Makkah and the prophet Muhammad's mosque in Madinah. The current expansion projects at both sites have been continuing unabated since 1985. Once completed, expansion work on the two sites will transform them into two of the largest human-made structures in the world. (Saudi Arabia, 1991).

The Holy Mosque in Makkah, which encloses the Holy Ka'aba and is thus the spiritual centre of the Islamic world, was first expanded in the early seventh century by Omar Ibn Al-Khattab, the second caliph after the death of the prophet Muhammad in 632 A.D. Over the last fourteen centuries, the mosque was repeatedly repaired and expanded as the number of Muslims grew. However, the mosque could accommodate only 48,000 pilgrims when Saudi Arabia was founded in 1932. The Saudi government launched the first expansion project in 1953. The mosque's courtyard was raised and covered with white marble. A second level was added to the structure and 18 gates constructed around the complex. Further expansion work was undertaken in 1960 to enlarge the complex to accommodate about 300,000 pilgrims.

The current expansion project covering Makkah and its environment when completed would cost the Saudi government 6.4 billion U.S. dollars. It will more than double the size of the Holy qusq to over 200,000 square meters (more than 2.1 million square feet). This will
more than double the number of pilgrims that the mosque can accommodate to about 605,000.

The expansion work on the Holy Mosque includes the establishment of 61,000 square meters of prayer area on the roof of the structure and another 40,000 square meters in the surrounding plaza. Four new staircases, five massive escalators and two new minarets are also being built. The whole structure is also being air-conditioned, with the installation of one of the largest units of its kind in the world, having a cooling capacity of 40,000 tons.

The expansion project launched at the prophet Muhammad’s mosque in Madinah is equally ambitious, and is scheduled for completion in the summer of 1992. The first structure on the site of today’s mosque was a modest building, which the prophet Muhammad himself helped construct. Subsequent expansion work enlarged the size of the mosque to 10,300 square meters (110,800 square feet), able to accommodate 17,000 pilgrims at the time of the foundation of the present Saudi Arabia in 1932. Further expansion work carried out during late 1960s and early 1970s enlarged the structure to allow almost 90,000 pilgrims inside at a time.

The current expansion project when completed in 1992, will more than double the size of the mosque to 165,500 square meters (1.78 million square feet). Once completed, the mosque will be the largest enclosed structure in the world, able to accommodate 257,000 pilgrims indoors. A further 250,000 pilgrims will be able to gather in the mosque’s outdoor courtyards.

The project calls for the construction of six additional minarets, each 104 meters (341 feet) high, each minaret will be crowned by a four-ton crescent plated in gold. Once completed, the mosque will have 2,174 columns, each 5.6 meters (18.3 feet).

A unique feature of the expansion project is the 27 main plazas that are being built. Each plaza is capped by a remote-controlled sliding dome which can be opened or closed within one minute depending on the weather. Each dome which is 16.65 meters (54.6 feet) high, weighs 80 tons, half of which consists of metallic parts. The plazas will be paved with marble in Islamic geometric patterns, and will be used for praying.

The mammoth structure is entirely air-conditioned. For this purpose, six cooling units with a 17,000 ton cooling capacity have been installed. Five will be in constant use, with the sixth on stand-by. Also, five 2.5 MW
generators will provide the mosque with its own independent power generating capacity.

In addition to the enclosed areas, a large plaza is being constructed that will increase the number of people that can worship at the mosque simultaneously to over 600,000.

Modernisation of other touristic facilities for better pilgrimage management at Makkah and Madinah have included scanning a bank of recently installed closed-circuit television sets. A Saudi soldier can monitor the crowds of pilgrims and call in helicopters for traffic or ambulance duties. Other cameras televise the Hajj events via satellite to millions of viewers globally (Abdul-Rauf, 1978).

Formerly, Hajj was beset by a high mortality rate: epidemics of smallpox, cholera, and malaria would sweep the crowded and unsanitary pilgrim camps. Now, because of mobile hospitals, portable toilets, disinfectant spraying, abundant pure water, and a modern quarantine centre at Jeddah, the World Health Organisation (WHO) no longer needs to regularly monitor the Hajj (Abdul-Rauf, 1978).

With the rise in the number of pilgrims into millions, much of the meat of the animals sacrificed during the Hajj was being wasted. The Saudi government solved this problem by establishing a modern slaughter house fitted with world class machines and equipment at Mina under the auspices of Islamic Development Bank as a part of Saudi Arabia’s Sacrificial Meat Utilisation Project (SASMUP). During the 1991 Hajj season, for instance, SASMUP charged each willing pilgrim about eighty-eight U.S. dollars towards the price of a live sheep and the cost associated with its slaughtering, skinning, cleaning, veterinary services and shipping to the poor in Muslim countries. A total of 407,120 sheep, 8,668 camels and 2,157 cows were slaughtered during the 1991 Hajj season by SASMUP management. The meat of about 5,000 carcasses was distributed over the feast days at Mina and Makkah to pilgrims and the poor. The remainder of the meat was refrigerated or frozen, packed in 2,344,000 cases and was shipped by air, sea and land to 23 Muslim countries around the world at the end of 1991 Hajj in June 1991 (see Table 2).

<table>
<thead>
<tr>
<th>Country</th>
<th>Number of Carcasses</th>
<th>Mode of Despatch</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Sudan</td>
<td>15,000</td>
<td>Frozen, by sea</td>
</tr>
<tr>
<td>Port Sudan</td>
<td>5,100</td>
<td>Chilled, by air</td>
</tr>
<tr>
<td>Khartoum</td>
<td>23,300</td>
<td>Chilled, by air</td>
</tr>
<tr>
<td>Pakistan</td>
<td>10,000</td>
<td>Frozen, by sea</td>
</tr>
<tr>
<td>Djibouti</td>
<td>65,000</td>
<td>Frozen, by sea</td>
</tr>
<tr>
<td>Bangladesh</td>
<td>40,000</td>
<td>Chilled, by land</td>
</tr>
<tr>
<td>Jordan</td>
<td>5,100</td>
<td>Chilled, by air</td>
</tr>
<tr>
<td>Chad</td>
<td>25,000</td>
<td>Chilled, by sea</td>
</tr>
<tr>
<td>Lebanon</td>
<td>10,000</td>
<td>Frozen, by sea</td>
</tr>
<tr>
<td>Mauritania</td>
<td>5,000</td>
<td>Frozen, by air</td>
</tr>
<tr>
<td>Mali</td>
<td>5,000</td>
<td>Frozen, by sea</td>
</tr>
<tr>
<td>Burkina Faso</td>
<td>35,000</td>
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</tr>
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<td>Frozen, by sea</td>
</tr>
<tr>
<td>Senegal</td>
<td></td>
<td>Frozen, by sea</td>
</tr>
<tr>
<td>Somalia</td>
<td>Barbers</td>
<td>3,000</td>
</tr>
<tr>
<td>Mogadishu</td>
<td>30,000</td>
<td>Frozen, by sea</td>
</tr>
<tr>
<td>Gambia</td>
<td>5,000</td>
<td>Frozen, by sea</td>
</tr>
<tr>
<td>Syria</td>
<td>15,500</td>
<td>Chilled, by land</td>
</tr>
<tr>
<td>Niger</td>
<td>5,000</td>
<td>Frozen, by air</td>
</tr>
<tr>
<td>Sierra Leon</td>
<td>5,000</td>
<td>Frozen, by sea</td>
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<tr>
<td>Guinea Conakry</td>
<td>5,000</td>
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<tr>
<td>Guinea Bissau</td>
<td>5,000</td>
<td>Frozen, by sea</td>
</tr>
<tr>
<td>Tanzania</td>
<td></td>
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</tr>
<tr>
<td>Zanzibar</td>
<td>3,000</td>
<td>Frozen, by sea</td>
</tr>
<tr>
<td>Darus Salam</td>
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<tr>
<td>Comoros</td>
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<tr>
<td>Kenya</td>
<td>3,000</td>
<td>Frozen, by sea</td>
</tr>
<tr>
<td>Mozambique</td>
<td>3,000</td>
<td>Frozen, by sea</td>
</tr>
<tr>
<td>TOTAL CARCASSES</td>
<td>327,000</td>
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</tbody>
</table>

Source: Kingdom of Saudi Arabia’s Sacrificial Meat Utilisation Project, Islamic Development Bank, Jeddah, Saudi Arabia.

Marketing segmentation dynamics of Islamic pilgrims

Muslim pilgrims experience spiritual joy while performing pilgrimage to Ka’aba. The spirit of Hajj is the spirit of total sacrifice - of personal comforts, worldly pleasures, the acquisition of wealth, the companionship of relatives and friends, vanities of dress and personal appearance, pride relating to birth, national origin, accomplishments, work or social status. This sacrifice of self was attained to the highest degree by the prophet Abraham, and is supposed to be emulated by every Muslim pilgrim.

In spite of the spiritual spirit of Hajj (total sacrifice), Muslim pilgrims visiting Ka’aba could be grouped psychographically into different segments. On the one end of the psychographic spectrum are thousands of ultra poor pilgrims, hailing from poor countries such as Bangladesh, Gambia and Mali, who arrive in Saudi Arabia after having invested their life’s savings to undertake pilgrimage. Many devout Muslims from these and similar countries, in their religious fervour, spend their life-long savings by selling such valuables...
as real estate and jewelry to undertake pilgrimage. Thousands of poor Muslim pilgrims from the world over often undertake their journeys under the most extreme conditions: shoeless, without funds for transportation or lodging, exposed to robbery of their few meagre possessions, vulnerable to imprisonment when attempting to cross national borders. Thousands of them could be seen sleeping on sidewalks and open places and begging for money and food during the pilgrimage season in Saudi Arabia. On the other extreme of the psychographic spectrum are affluent Muslims, who wish to undertake pilgrimage in luxury by traveling first class and staying in luxury hotels such as Inter-Continental, Sheraton and Hilton. Because of their psychographic-cum-demographic superiority as compared to other pilgrims hailing from poor countries, they demand world-class comfort.

Marketers who tailor their trips to affluent Muslims also emphasise internationally recognised standards of comfort, luxury and service. A number of travel agencies and tour operating firms have appeared in all major cities of western countries such as the U.S., Canada, Britain and Australia, which specialise in sending pilgrims to Saudi Arabia in package tours. These firms publish their advertisements in religious, cultural and ethnic newspapers, magazines, and radio/T.V. programs, and target their clients emphasising comfort, inter-nationally recognised standards in service, and competitive prices. For instance, Makkah Inter-Continental Hotel, boasting the globally best as comfort and luxury in a desert, serves the upperclass/affluent visiting pilgrims.

The thought of a Somalian farmer who has walked thousands of miles in his religious fervour to reach Makkah and an Indian butcher who has seen many rejections for governmental clearances, exit visas and foreign exchange allotment and who has invested his life savings in making the pilgrimage by sea, presents a monumental contrast as compared to those who are enjoying the internationally acclaimed hospitality of Inter-Continental Hotel in Makkah.

Inviting and hosting thousands of Muslim pilgrims hailing from communist countries at the expense of Saudi government each year adds a new dimension to marketing aspects of pilgrimage. These Muslim pilgrims, if not afforded such a Saudi generosity and hospitality, will not be able to afford pilgrimage to Ka'aba because of tremendous socio-economic and political problems in their countries. In 1991, 4,954 Muslims from the former Soviet Union and

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extremes of the psychographic spectrum . . . some undertake the journey under the most extreme and poor conditions . . . others stay in luxury hotels and demand world class comfort.

Albania performed Hajj as the guests of Saudi government.

Tips for better pilgrimage management

Managerial concerns arising out of managing high density tourist/pilgrim situations and other high density tourist/pilgrim sites have been the focus of tourism studies (Pearce, 1989; Wanhill, 1980).

Hosting and managing two million pilgrims during a specific month at a particular place is not an easy task for any government or agency. In spite of the concerted efforts of the Saudi government, there is still room for improvements of touristic facilities at Jeddah, Makkah and Madinah. Some of following suggested management tips, if properly implemented, can go a long way in improving the quality of the pilgrimage experience:

1. A large number of local Saudi
hosts while interacting with visiting international pilgrims demonstrate rudeness and impolite behaviour. Ministry of religious affairs in close cooperation with different Hajj agencies and organisations should carry out an educational campaign to educate the members of the public about the basic principles of courtesy and politeness.

2. Majority of pilgrim staff such as immigration inspectors, custom officers, pilgrim guides, and cabs etc. are highly discourteous and rude. Concerned departments and agencies should retrain them in international hospitality and courtesy. American Hotel and Motel Association (AH&MA) has developed a unique training program in international hospitality. Concerned Hajj agencies should approach AH&MA for assistance in this area.

3. Long waiting lines for immigration, customs and health clearances at the arrival and departure times create lot of resentment among the international pilgrims. Most often pilgrims have to wait 6 to 12 hours before being allowed to board the airplane or leave the airport. More counters and better trained personnel can go a long way in ameliorating this problem. Concerned Saudi Agencies responsible for managing pilgrim facilities such as airports which encounter long lines, should consider the recommendations of Pearce (1989) to ameliorate these problems. Concerned Saudi agencies should develop a mechanism of fixing a quota for the local Saudis. Such a mechanism, if developed and managed properly, can help to control their number for better pilgrimage management. A maximum limit set keeping in view the capacity of pilgrim infrastructure is a prerequisite for qualitative pilgrim experience and excellence in pilgrim management.

4. On the pattern of current quota imposed by Saudi Arabia to limit the influx of international Muslim pilgrims from each country, the Saudi government should also consider devising a mechanism of fixing a quota for the local Saudis. Such a mechanism, if developed and managed properly, can help to control their number for better pilgrimage management. A maximum limit set keeping in view the capacity of pilgrim infrastructure is a prerequisite for qualitative pilgrim experience and excellence in pilgrim management.

5. Saudi ministry of religious affairs responsible for Hajj operations should figure out a minimum amount which is needed for living expenses and performance of Hajj. All the intending international Muslim pilgrims while applying for pilgrimage visa should be required to show proof of the possession of this fixed amount in hard currencies. Airlines and shipping companies transporting the pilgrims should be required to check the possession of minimum amount in hard currencies before allowing international pilgrims to board the airplanes and ships at the departure points. Carriers violating this norm should be fined per passenger. Pilgrims should also be required to show these funds upon their arrival at the immigration counter in Saudi Arabia. If they lack sufficient funds, they should be deported immediately to their countries in order to avoid future problems such as begging.

6. Begging during Hajj time should be banned and all beggars irrespective of their nationalities should be apprehended and immediately deported.

7. A better system of hosting the pilgrims should be devised. For instance, all the accommodation establishments have to be registered with the Saudi Ministry of Religious Affairs. Standards of quality, price determination and hygiene should be determined and monitored. All commercial and non-commercial establishments providing accommodation to international pilgrims should form an association for self regulation and adherence to self-proclaimed ethical code of conduct. Such an association should establish its offices at Jeddah, Makkah and Madinah to help international pilgrims find suitable places for

![Regulation is required... for better host courtesy, queue management, capacity limits, basic living expenses, control of begging, accommodation standards, guide and profiteering controls.](image-url)
pilgrims’ beliefs, Saudi businessmen and shopkeepers inflate their prices during Hajj season in order to rip-off the international pilgrims. The Saudi government should establish a system of checking these prices and punishing the black marketers and profiteers.

10. Providers of different pilgrim services such as travel agencies, tour operating firms, and taxi companies have mushroomed in Saudi Arabia, creating enormous problems because of non-existence of requisite laws to govern and regulate their functioning. Saudi government should consider enacting legislation, which should envisage mandatory registration, regular monitoring of prices, a fund to compensate in the event of a loss to a client and a complaints processing mechanism for different suppliers of pilgrim services.

Conclusion

Islamic pilgrimage (Hajj) to Makkah in Saudi Arabia, which was initiated by prophet Muhammad under the directive of God fourteen hundred years ago as an exercise of a few hundred devout Muslim pilgrims, has culminated into a gigantic operation of two million people representing almost every nationality in the modern times. Islamic pilgrimage affords the Muslim pilgrim an opportunity to escape from the conflicts and vagaries of daily life to the birth place of his/her faith, its progenitors and the House of the Lord.

There he/she seeks, with his/her brethren, spiritual nourishment and deliverance. The pilgrimage symbolises the return to his/her origin. Pilgrims taste the joy of this return, and their spiritual motivation is contented and fulfilled.

By exploring and possibly implementing the management perspectives mentioned in the paper, the Saudi government and its concerned Hajj agencies can play an important role in enhancing the quality of Hajj pilgrimage.

References
Review of tourism in the USA

International tourism has emerged as the USA's second largest foreign exchange earner. This paper examines the dynamics of the USA's major tourist markets. Furthermore, it offers marketing tips on how US tourism firms and government can improve the country's marketing competitiveness by internationalizing their operations in order to improve their share of the international tourism industry to its fullest potential.

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Visits by international tourists to the USA comprise a bright spot in its international trading account. International tourism has emerged as the source of the second largest amount of foreign exchange earnings for the USA (Table 1). Because of its enormous foreign exchange earning potential, it could be called the nation's second best export revenue earner (next only to the sale of aeroplanes and machinery).

The USA's success story in the marketing of its international tourism is evident in its first place ranking— for five consecutive years— among nations of the world in international travel receipts. The USA garnered nearly 17.5% of total international tourism spending globally in 1990. Positioned with the world's top tourism destinations, the USA ranks second in international tourist arrivals (next to France), representing a 9% market share of the world's tourist arrivals.

International tourism is the largest export of the USA's international trade in services.

The major beneficiaries of spending by international tourists in the USA have been the airlines, retailers marketing souvenirs and gifts and hotels/motels (see Table 2). The airline industry, with $12.3 billion receipts, was the leading beneficiary of international tourism in 1990. International tourists, reflecting the fact that nine out of 10 engage in shopping for souvenirs and gifts while in the USA, spent nearly $12 billion for retail purchases in 1990. Shopping expenditure by international tourists directly supported about 129,000 jobs in retail establishments with a payroll of $1.7 billion.

The US hospitality industry is one of the few booming industries in spite of the recession. One of the major factors responsible for its growth is the positive impact of the spending of well

'You'll know America when you catch the smell of freedom in the air and see the colors of the rainbow on the flag and hear the music of the Seventh Regiment and there's never been a better time than now. So what are you waiting for, an invitation from the President? America is yours to discover.'

George Bush
President of the United States

Text of President's welcome message to international tourists

Most people think of America as the land of freedom, but to those who have visited here it's also a place of beauty, wonder and excitement. From New York City to the Hawaiian Islands, you'll see our culture, our sense of history, our sense of humor. America is a land of contrasts, from rolling green fields to sandy white beaches to red hot Dixieland jazz. You'll find Great Lakes and a Grand Canyon. But wherever you go, from Maine to Texas, from the Atlantic Ocean to the Pacific Coast, most of all you'll find the friendliest people in some very interesting places. Today there are more reasons than ever to visit America, and there's never been a better time than now. So what are you waiting for, an invitation from the President? America is yours to discover.'

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Visits by international tourists to the USA comprise a bright spot in its international trading account. International tourism has emerged as the source of the second largest amount of foreign exchange earnings for the USA (Table 1). Because of its enormous foreign exchange earning potential, it could be called the nation's second best export revenue earner (next only to the sale of aeroplanes and machinery).

The USA's success story in the marketing of its international tourism is evident in its first place ranking—for five consecutive years—among nations of the world in international travel receipts. The USA garnered nearly 17.5% of total international tourism spending globally in 1990. Positioned with the world's top tourism destinations, the USA ranks second in international tourist arrivals (next to France), representing a 9% market share of the world's tourist arrivals.

International tourism is the largest export of the USA's international trade in services.

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over $11 billion by international tourists on US hotels and motels in 1990. That is why some of the famous resorts such as Hawaii and Las Vegas are having a hospitality construction boom despite the fiscal crunch across the country. Spending by international tourists directly supported about 274,000 jobs with a payroll of over $3 billion in the hospitality industry. Similarly international tourists contributed over $8 billion to the restaurant industry in 1990 accounting for an estimated 274,000 food service jobs and a payroll of about $2.3 billion. The entertainment, recreation and amusement industry was also a major beneficiary. It received well over $3.8 billion from international tourists directly supporting over 92,000 jobs in the industry with a payroll of over $1.4 billion.

The emergence of international tourism as the USA’s hottest export has been the motivating factor behind its focus in contemporary research on international tourism.\(^5\) Exporting the USA’s international tourism is one of the few exceptions where it still enjoys a lead on a global level. If the country’s unlimited, enviable and comprehensive tourism potential is unleashed to its fullest extent by strategic marketing, it can undoubtedly help to reduce the existing gulf in its balance of payments account.

The role of international tourism in reducing the trade deficit can be illustrated by the large travel account surpluses the USA enjoys against its two major trading partners, with which it otherwise has a deficit – Canadian tourists spent $2.7 billion more in the USA than US tourists spent in Canada in 1990, while Japanese tourists spent nearly $8 billion more in the USA than US tourists spent in Japan in 1990 (surplus figures include passenger fare payments to US carriers).

The USA’s share of world international tourist arrivals has gone up from 7.9% in 1985 to 9.1% in 1990; on the other hand, America’s share of world international tourism receipts has increased from 15.4% in 1985 to 15.8% in 1990.\(^4\)

When each international tourist spends an average of $2045 per person, per trip – $1815 more per person, per trip than their domestic counterparts – and stays about three weeks (five times more than a domestic tourist) it is clear that the potential for profit both for a tourism firm and the nation as a whole is enormous.

The emergence of international tourism as a leading export product could be attributed to the US tourism industry’s comparative economic advantages on a worldwide basis, as facilitated by the dollar’s continued depreciation since 1985 against the major currencies of the industrialized world.\(^3\) The low value of the dollar, coupled with moderate inflation and cheap petrol prices,\(^6\) has made holidays in the USA a real bargain for international tourists. All of these factors led to an estimated all time high 41.6 million tourist arrivals in 1991 and a projected 44.0 million tourist arrivals in 1992, culminating in a growth of about 67% since 1986 (Figure 1).

**Panacea for the trade deficit**

With the USA’s mounting international trade deficit with, eg the Far East, Canada, Germany and Italy,\(^7\) pressure is building from industry, society and labour to take some ameliorating steps to reverse the declining trends in the USA’s competitiveness and increase its exports. The USA seems to be losing its edge in industry after industry to international competitors, but international tourism is one of the few exceptions where it still enjoys a lead on a global level. If the country’s unlimited, enviable and comprehensive tourism potential is unleashed to its fullest extent by strategic marketing, it can undoubtedly help to reduce the existing gulf in its balance of payments account.

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**Dynamics of the USA’s major tourist markets**

Japan, the UK, Mexico, Germany, France, Australia, Canada, Brazil, Italy and the Bahamas are the top 10 tourist markets for the USA’s international tourism products (see Table 3). Japan has emerged as the USA’s largest overseas tourist market since 1982. South Korea registered the highest single percentage growth (41.4%) since 1989 among the top overseas tourist markets and is projected to register once again the highest increase to the tune of 20% in 1992 among all the major overseas tourist markets (see Table 4).

---

**Table 1. International tourism as an export compared with other merchandise exports in the USA in 1990. (Total merchandise exports = $393.9 billion)*\(^1\)**

<table>
<thead>
<tr>
<th>Top four commodity sections and international travel</th>
<th>Exports (Billions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Machinery and transport equipment</td>
<td>175.5</td>
</tr>
<tr>
<td>International travel to the USA (^6)</td>
<td>52.8</td>
</tr>
<tr>
<td>Miscellaneous manufactured items</td>
<td>35.3</td>
</tr>
<tr>
<td>Chemicals and related products</td>
<td>39.0</td>
</tr>
<tr>
<td>Agricultural goods</td>
<td>36.8</td>
</tr>
</tbody>
</table>

Source: US Travel and Tourism Administration, October 1991

Notes: *The $393.9 billion figure excludes the $52.8 billion spent on international travel to the USA. Travel is a service export. **International travel receipts is a service export and not a merchandise export, but if it was compared with the 1990 merchandise exports its ranking is as above.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Share of each segment of tourism industry</th>
<th>Amount (Billion)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>US International airline industry (to and from the USA)</td>
<td>12.3</td>
</tr>
<tr>
<td>2</td>
<td>General retail industry (souvenirs and gift shopping)</td>
<td>12.0</td>
</tr>
<tr>
<td>3</td>
<td>Hospitality industry</td>
<td>11.0</td>
</tr>
<tr>
<td>4</td>
<td>Restaurant industry</td>
<td>8.0</td>
</tr>
<tr>
<td>5</td>
<td>Domestic transportation industry (air, cab, car rental, bus and rail)</td>
<td>4.7</td>
</tr>
<tr>
<td>6</td>
<td>Entertainment, recreation and amusement industry</td>
<td>3.8</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>51.8</td>
</tr>
</tbody>
</table>

Source: US Travel and Tourism Administration, October 1991

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Tourism Management September 1992
Reports

Total foreign tourism to the USA up 67% from 1986 to 1992.

Figure 1. Source: US Travel and Tourism Administration, October 1991.

Canada serves as the largest tourist market for the USA’s international tourism products. In 1990, 17.3 million Canadian tourists visited America compared with 10.9 million in 1986; 20.1 million Canadian tourists are projected to visit the USA in 1992 culminating in an incredible 84% increase since 1986. One major factor responsible for such a favourable scenario has been the higher taxes in Canada (for instance 14% Goods and Services Tax (GST) compared with 7 or 8% in the USA). Other factors are higher prices of goods and services (ranging from 25 to 100% higher in Canada) and the increasing value of the Canadian dollar. All these factors have contributed to the arrival of millions of Canadian tourists every weekend to shop in the USA’s border states.

The emergence of Japan as the USA’s largest overseas tourist market has changed the dynamics of the US international tourism industry. Japan is also Asia’s leading generator of international tourism. Ten million Japanese tourists travelled abroad in 1990. If the $41 billion trade deficit with Japan is to be reduced, the USA should market its tourism products more aggressively there because of the continuous preference of the country as a tourist destination by Japanese tourists. The USA has the highest trade deficit with Japan but interestingly it has a surplus with it in its exchange trade of international tourism— to the tune of $8 billion in 1990.

Japan is the only country whose government encourages its citizens to travel internationally in order to reduce its trade surplus.

The USA holds the position as the top Japanese international tourist destination: it is cheaper for Japanese to visit Hawaii than to undertake vacations in their own country because of higher inflation at home. What attracts the Japanese to America is the low value of the US dollar in comparison with the yen, moderate inflation, cheap petrol and an abundance of shopping opportunities in most of its major tourist resorts and cities. Consequently, it is less expensive for the Japanese to visit the USA than it is for them to visit most other industrialized nations of the West.

Hong Kong and South Korea are the most popular destinations for Japanese tourists in Asia, but the tourism infrastructure in these destinations is hard pressed to keep up with the expected growth in Japanese visitors in the 1990s and beyond. More than half a million Japanese tourists visited China in 1988, but they are now avoiding it because of its human rights record. The shortage of accommodation in Asia is also inducing Japanese tourists to visit the USA. Japan’s outbound international tourism is expected to register the highest growth in the world compared with other major generators of international tourism in the foreseeable future, providing the USA with an ample opportunity to tap into this gold mine.

Table 3. Top 10 tourist generating countries for the USA.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Country</th>
<th>Number of arrivals</th>
<th>% change from 1989</th>
<th>1990 share of total (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Canada</td>
<td>17 262 461</td>
<td>+12.3</td>
<td>51.2</td>
</tr>
<tr>
<td>2</td>
<td>Japan</td>
<td>13 321 495</td>
<td>+4.9</td>
<td>9.5</td>
</tr>
<tr>
<td>3</td>
<td>UK</td>
<td>2 243 792</td>
<td>+9.9</td>
<td>6.6</td>
</tr>
<tr>
<td>4</td>
<td>Mexico</td>
<td>1 341 108</td>
<td>+6.0</td>
<td>3.9</td>
</tr>
<tr>
<td>5</td>
<td>Germany</td>
<td>1 352 826</td>
<td>+11.7</td>
<td>3.5</td>
</tr>
<tr>
<td>6</td>
<td>France</td>
<td>716 036</td>
<td>+9.5</td>
<td>2.1</td>
</tr>
<tr>
<td>7</td>
<td>Australia</td>
<td>465 505</td>
<td>+14.5</td>
<td>1.3</td>
</tr>
<tr>
<td>8</td>
<td>Brazil</td>
<td>398 484</td>
<td>+10.4</td>
<td>1.1</td>
</tr>
<tr>
<td>9</td>
<td>Italy</td>
<td>395 783</td>
<td>+11.5</td>
<td>1.1</td>
</tr>
<tr>
<td>10</td>
<td>Bahamas</td>
<td>324 255</td>
<td>-3.2</td>
<td>0.9</td>
</tr>
</tbody>
</table>

Source: US Travel and Tourism Administration, December 1990.


<table>
<thead>
<tr>
<th>Origin</th>
<th>1991 (000)</th>
<th>1992 (000)</th>
<th>% change 91/92</th>
<th>% change 92/91</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>3268</td>
<td>3372</td>
<td>+4</td>
<td>+3</td>
</tr>
<tr>
<td>UK</td>
<td>2227</td>
<td>2336</td>
<td>+1</td>
<td>+4</td>
</tr>
<tr>
<td>Germany</td>
<td>1207</td>
<td>1265</td>
<td>+5</td>
<td>+5</td>
</tr>
<tr>
<td>France</td>
<td>755</td>
<td>807</td>
<td>+7</td>
<td>+7</td>
</tr>
<tr>
<td>Italy</td>
<td>415</td>
<td>434</td>
<td>+7</td>
<td>+6</td>
</tr>
<tr>
<td>Brazil</td>
<td>413</td>
<td>447</td>
<td>+9</td>
<td>+8</td>
</tr>
<tr>
<td>Australia</td>
<td>500</td>
<td>559</td>
<td>+9</td>
<td>+12</td>
</tr>
<tr>
<td>Switzerland</td>
<td>297</td>
<td>310</td>
<td>+4</td>
<td>+4</td>
</tr>
<tr>
<td>Netherlands</td>
<td>296</td>
<td>312</td>
<td>+6</td>
<td>+6</td>
</tr>
<tr>
<td>South Korea</td>
<td>251</td>
<td>300</td>
<td>+20</td>
<td>+20</td>
</tr>
</tbody>
</table>

Source: US Travel and Tourism Administration, May 1991.
Receipts from international tourists

America received $52.8 billion from international tourists in 1990 compared with $22.0 billion in 1985. It is estimated to receive about $57.8 billion in 1991 and is projected to receive $62.9 billion in 1992 (see Figure 2). On the other hand, payments by outbound American tourists only grew one-third the rate of receipts. Consequently, the USA’s international tourism account recorded a $2.6 billion surplus for the first time in 1989, which increased to $5.2 billion in 1990 and is estimated to be in surplus of $9.4 billion in 1991. It is projected to be in surplus of $10.9 billion in 1992 (see Figure 3).

In spite of this tremendous growth in tourist arrivals and tourist receipts, the USA has a long way to go to unleash its full potential in the marketing of international tourism.

Internationalization by US firms and government

The way US gateway reception counters at major international airports operate, does not help foreign visitors. For instance, tourism staff expect every arriving international visitor to be English speaking, and to have full familiarity with US rules. There is a dearth of bilingual/trilingual staff manning these counters, sending a wrong signal to the USA’s major tourist markets. The prime victims of this ethnocentric attitude are Japanese tourists, who find it hard to communicate with their US hosts.

Federal, state, county and city governments responsible for managing such reception counters should provide bilingual/trilingual staff particularly at those destinations/resorts which are visited by a large number of international tourists, such as Washington, DC.

Most tourism establishments have not internationalized their operations despite catering for a large number of international clients. The US emphasis of their operations is visible from every sphere of their product/service. They do not have bilingual/trilingual staff to facilitate communication with international guests. Their menus are not printed in major international languages. They do not serve international drinks and cuisines. They do not provide newspapers and magazines in some of the major international languages such as Japanese, French, Spanish, German and Arabic.

Tourism firms such as airlines, hotels, motels, restaurants, casinos, etc serving a large number of international clients at famous international destinations/resorts such as Disneyland, Disneyworld, Hawaii, New York City, Las Vegas, Washington, DC, Niagara Falls etc should consider thoroughly internationalizing their operations. Examples include providing bilingual/trilingual staff, printing menus in major international languages, providing tourist literature and maps in bilingual/trilingual forms, and providing newspapers and magazines in the languages of their clientele. Providing some of the popular TV channels, eg of the UK, France, Germany, Japan, Mexico, and the Arab world would be an added attraction.

Some of the national platforms of tourism firms such as the American Hotel and Motel Association (AHMA), the Travel Industry Association of America (TIAA) and the National Restaurant Association (NRA) etc should consider devising ways and means of helping their members in their efforts to internationalize their operations. Development of a training programme called ‘International Hospitality’ by AHMA, TIAA and NRA, etc would be an appreciable endeavour in this regard.

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ists, causing enormous confusion and frustration to them. The AHMA has internationalized some of these tourist symbols, ready for adoption by tourist firms across the country. These new symbols will help the tourism industry in facilitating communication with international tourists. They are ideally suited for use, for instance, in guest service directories as well as lobby signage in hotels and motels. These tourist symbols have been collected from various sources including the Federal Department of Transportation and Signs of Safety, Inc.

Tourism firms such as retail stores, hotels, gas stations, car rental firms, restaurants catering to a large number of international tourists at famous destinations/resorts refuse to accept foreign currency, foreign credit cards and travellers cheques in foreign denominations, whereas their counterparts in Canada, Europe and Japan are pleased to accept American credit cards, US dollars and travellers cheques in US currency. Any shop/store, for instance, is pleased to accept US dollars anywhere in Toronto, whereas most of the shops and stores in Buffalo, New York, and Niagara Falls, for instance, refuse to accept Canadian dollars. The indifferent attitude of these tourism firms towards international tourists is a major deterrent in sending home a fully satisfied international tourist.

Local chambers of commerce are the appropriate platforms for tourism firms to influence the thinking and marketing behaviour of their business associates representing other segments of the tourism industry, such as stores and banks. These chambers should help to devise a mechanism of facilitating the shopping experience of international tourists by convincing banks and stores to accept foreign monetary units without any surcharge or commission. Doing so would present a more welcoming picture of the USA to international guests. Japanese tourists are the prime victims of this indifferent attitude though they are the biggest spenders among international tourists visiting the USA and always go on shopping sprees while holidaying there.

Long queues and delays at immigration and customs counters at major airports cause enormous frustration to arriving international tourists. The United States Travel and Tourism Administration (USTTA), the federal agency responsible for marketing international tourism, should influence the decision makers in federal immigration and customs departments to develop a mechanism of expediting immigration and custom clearances in order to present a more welcoming picture of the USA to international tourists.

The emergence of Japan as the country's leading overseas tourist market warrants the 'Japanization' of the operations of US tourism firms. Such a move becomes imperative because of the uniqueness of Japanese consumer behaviour. For instance, every moment of a Japanese tourist's day is planned to maximize every minute of the vacation from sunrise to sunset. It is intense from the perspective of velocity and volume of tourism pursuits. Conversely, the vacation of an average international tourist hailing from the West is designed to be relaxed and free from worry. There are opportunities to be tapped by US tourism suppliers who understand and appreciate the uniqueness of Japanese tourists' consumer behaviour and adjust their operations accordingly. By attracting the optimum number of Japanese tourists to US destinations, and sending them back as satisfied and brand-loyal clients, all the participants in the tourism system stand to benefit.

Hosting about 44 million tourists in 1992 from around the world requires a thorough grounding in the cultural dynamics of guests. Employees of tourism firms should demonstrate appreciation, understanding and respect for the different beliefs, attitudes and perspectives of international tourists. Expecting international tourists to behave like US tourists is a highly ethnocentric attitude. Employers and educators of tourism employees should teach them international cross-cultural diversity so that tourism employees behave more anti-ethnocentrically and respectfully in order to please and satisfy international guests.

With a few exceptions, most of the states, counties and cities have not recognized the importance of international tourism in their economies. For instance, Florida is the only state in the nation which has a separate division and separate marketing plan exclusively devoted to the promotion of international tourism to the state. France, with a population of 60 million, received more than 61 million international tourists in 1990. The USA, with a population of 250 million, received only 41.6 million tourists in 1990. It has a long way to go to climb to its potential in the marketing of its tourism products globally. Even remote states with zero visibility in the international arena, such as North Dakota, can join hands with their neighbouring states, like South Dakota, Montana and Minnesota, and Canadian provinces across the longest peaceful border in the world, Manitoba and Saskatchewan, to capitalize on opportunities to attract international tourists by developing cooperative programmes. All the states should recognize the importance of international tourism by developing a separate marketing plan for international tourism on the pattern of Florida. They should develop a strategy on how to attract more international tourists to their respective destinations/resorts through cooperative programmes with their neighbours. Coordination and cooperation in the arena of international tourism assumes more significance because of the fact that an international tourist travelling thousands of miles to visit the USA is not here for one city, one hotel or one attraction.

Conclusion

The emergence of international tourism as the USA's hottest export with unlimited potential for growth because of its globally competitive advantage is offering the country a sign of hope in the present gloomy era of mounting trade deficit, federal debt and recession. By hiring bilingual/trilingual staff, globalizing their day-to-day operations, adopting globally accepted tourism symbols, convincing tourism related businesses to accept foreign credit cards and foreign currency, expediting immigration and
custom clearances, understanding and appreciating the unique consumer behaviour of certain international tourists, such as the Japanese, and teaching international cross-cultural diversity to their employees, both government and tourism firms can enhance the USA’s competitive advantage considerably. US tourist destinations with negligible visibility in the arena of international tourism should try to benefit from the tourism boom by teaming up with their neighbours in their attempts to market their attractions globally and strategically. Such a commitment and endeavour will go a long way to ensuring that the USA’s potential to serve international tourists is unleashed to its fullest extent.


3‘US Travel and Tourism Administration, World Tourism Organization, October 1991.
4United States Travel and Tourism Administration, Annual Report, Department of Commerce, Washington, DC, October 1990.
5Uddin and Krohn, op cit, Ref 2.

Acknowledgment: The author expresses his sincere appreciation to Dr David L. Edgell, Sr, Executive Director, Office of Policy and Planning and Mr Ron Erdmann, Market Research Analyst, US Travel and Tourism Administration, US Department of Commerce, Washington, DC, USA for providing useful information that contributed to the development of this article.

Notes

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Notes
Understanding the Unique Consumer Behavior of Japanese Tourists

Zafar U. Ahmed
Franklin B. Krohn

ABSTRACT. Japan is the largest market for U.S. inbound overseas tourism, and international tourism is the largest source of earning foreign exchange for the U.S. economy. Japan has registered the highest growth in the world in the development of its outbound international tourism during the 1980s and is expected to continue its rapid growth in the foreseeable future. This paper examines the unique characteristics of the consumer behavior of Japanese tourists who are or will be vacationing in the U.S. Recommendations have been offered to marketers of tourism firms who can benefit by understanding the unique characteristics of a Japanese tourist's consumer behavior and by changing their marketing strategies accordingly.

INTRODUCTION

Emergence of Japan as Asia's leading generator of international tourism during the decade of the 1980s was the major factor responsible for its focus in contemporary literature of international tourism (Polunin 1989, Lin 1990, Murakami and Go 1990, Uddin and Krohn 1990, Ziff-Levin 1990, Sharpe 1990, Holtzman et al. 1991). International tourism is the second largest earner of foreign exchange for the U.S. in its international merchandise
As indicated in Table 1, tourism income for the U.S. far exceeds that of the once dominant agriculture industry. Japan is the largest supplier of overseas tourists to the U.S. Table 2 displays data that shows tourism from Japan is over 30 percent higher than the second place country, the United Kingdom. International tourism offers a unique opportunity for the U.S. to reduce its mounting trade deficit with Japan. This opportunity enables U.S. tourism marketers to offer low-cost vacations to Japanese tourists because of the disequilibrium between the dollar and the yen; and to help the U.S. overcome the high deficits as displayed in Table 3. Furthermore, the positive predispositions of Japanese tourists toward international travel to the U.S. present a highly viable target market.

Besides being the most preferred tourist destination among the Japanese, the U.S. has more potential than other international tourist destinations to

### Table 1. International Tourism as an Export Compared to Other Merchandise Exports in America in 1990

<table>
<thead>
<tr>
<th>TOP 4 COMMODITY SECTIONS &amp; INTERNATIONAL TRAVEL</th>
<th>EXPORTS (IN $BILLIONS)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Machinery &amp; Transport Equipment</td>
<td>$ 175.5</td>
</tr>
<tr>
<td>International Travel to the United States **</td>
<td>52.8</td>
</tr>
<tr>
<td>Miscellaneous Manufactured Items</td>
<td>39.3</td>
</tr>
<tr>
<td>Chemicals &amp; Related Products</td>
<td>39.0</td>
</tr>
<tr>
<td>Agricultural Goods</td>
<td>38.8</td>
</tr>
</tbody>
</table>


* The $393.3 Billion figure excludes the $52.8 Billion spent on international travel to the United States. Travel is a service export.

** International travel receipts is a service export and not a merchandise export. But if it was compared to the 1990 merchandise exports, above is its ranking.
TABLE 2. Top Ten Tourist Generating Countries for America in 1990

<table>
<thead>
<tr>
<th>RANK</th>
<th>COUNTRY</th>
<th>NUMBER OF ARRIVALS</th>
<th>% CHANGE FROM 1989</th>
<th>1990 SHARE OF TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Canada</td>
<td>17,262,461</td>
<td>+ 12.3</td>
<td>51.2%</td>
</tr>
<tr>
<td>2</td>
<td>Japan</td>
<td>3,231,495</td>
<td>+ 4.9</td>
<td>9.5%</td>
</tr>
<tr>
<td>3</td>
<td>United Kingdom</td>
<td>2,243,792</td>
<td>+ 0.9</td>
<td>6.6%</td>
</tr>
<tr>
<td>4</td>
<td>Mexico</td>
<td>1,341,108</td>
<td>+ 8.0</td>
<td>3.9%</td>
</tr>
<tr>
<td>5</td>
<td>Germany</td>
<td>1,202,826</td>
<td>+ 11.7</td>
<td>3.5%</td>
</tr>
<tr>
<td>6</td>
<td>France</td>
<td>716,036</td>
<td>+ 9.5</td>
<td>2.1%</td>
</tr>
<tr>
<td>7</td>
<td>Australia</td>
<td>465,505</td>
<td>+ 14.5</td>
<td>1.3%</td>
</tr>
<tr>
<td>8</td>
<td>Brazil</td>
<td>398,484</td>
<td>+ 19.4</td>
<td>1.1%</td>
</tr>
<tr>
<td>9</td>
<td>Italy</td>
<td>395,783</td>
<td>+ 11.5</td>
<td>1.1%</td>
</tr>
<tr>
<td>10</td>
<td>Bahamas</td>
<td>324,255</td>
<td>- 8.2</td>
<td>0.9%</td>
</tr>
</tbody>
</table>


attract an optimum number of Japanese tourists in the foreseeable future by virtue of the tremendous expansion capacity of its tourism industry. Millions of Japanese tourists visiting destinations in the U.S. are the source of economic benefits for hundreds of thousands of small, medium, and large tourism firms, and communities throughout the U.S. Hawaii, especially, has been a prime beneficiary of tourism from Japan (Downs, 1987).

Serving Japanese tourists sometimes poses severe problems for domestic suppliers of tourism products due to differences in expectations, ideologies, perspectives, and visions of Japanese clients. This paper examines the underlying dimensions of consumer behavior unique to Japanese tourists. U.S. tourism entrepreneurs must learn to appreciate the dynamics of Japanese consumer behavior and change their marketing programs accordingly to meet the expectations and needs of their Japanese clients.

Schiffman and Kanuk (1987) have defined consumer behavior as “the behavior that consumers display in searching for, purchasing, using, evaluating, and disposing of products, services, and ideas which they expect will satisfy their needs.” Thus, consumer behavior lies at the heart of contemporary tourism marketing. The successful tourism marketer effectively devel-
TABLE 3. Top Ten Deficit Causing Countries in America's Merchandise Trade in 1990

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>BILLIONS $</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Japan</td>
<td>- 41.1</td>
</tr>
<tr>
<td>2. Taiwan</td>
<td>- 11.2</td>
</tr>
<tr>
<td>3. China</td>
<td>- 10.4</td>
</tr>
<tr>
<td>4. Germany</td>
<td>- 9.4</td>
</tr>
<tr>
<td>5. Canada</td>
<td>- 7.5</td>
</tr>
<tr>
<td>6. Venezuela</td>
<td>- 6.3</td>
</tr>
<tr>
<td>7. Saudi Arabia</td>
<td>- 5.9</td>
</tr>
<tr>
<td>8. Nigeria</td>
<td>- 5.4</td>
</tr>
<tr>
<td>9. Italy</td>
<td>- 4.7</td>
</tr>
<tr>
<td>10. South Korea</td>
<td>- 4.1</td>
</tr>
</tbody>
</table>

America's Total Annual Deficit - 101.0


ops tourism products that are of value to consumers in appealing and persuasive ways. The essential reason for studying the unique consumer behavior of Japanese tourists is to enable U.S. tourism marketers to make better marketing decisions, while reducing the incidence of product failures.

CULTURAL DIFFERENCES

The basic foundations of the U.S. and Japanese cultures are radically different from one another. Japanese have been indoctrinated on Buddhist, Shintoist and Confucian thought, whereas U.S. residents have been inculcated with Greco-Roman and Judeo-Christian cultural backgrounds. Consequently, the cultural-logic gaps experienced by these two nationalities are significantly different from each other (see Tables 4 and 5).
The two nationalities differ in their perspective, vision and logic. These differences must be considered because attitudes, the by-products of these differences, influence tourist decision-making process. Assuming similarity between people of the U.S. and Japan can be potentially harmful. The reason that underlying differences must be carefully analyzed and accommodations creatively employed is to prevent misunderstandings.

Socio-culturally, Japan’s population of 125 million is the most homogeneous in the world, having been resistant to invasion and immigration for centuries. Practically all Japanese speak the same language, practice the same religion, and share the same socio-cultural values, as compared to the U.S., which is a conglomeration of the world’s cultures.

TABLE 4. Cultural Logic Gap: Personal Behavioral Characteristics

<table>
<thead>
<tr>
<th>U.S.</th>
<th>JAPANESE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Focus on content</td>
<td>Focus on process</td>
</tr>
<tr>
<td>Seek agreement</td>
<td>Seek relationships</td>
</tr>
<tr>
<td>Informal</td>
<td>Formal</td>
</tr>
<tr>
<td>Egalitarian</td>
<td>Hierarchical</td>
</tr>
<tr>
<td>Explicit in Communication</td>
<td>Polite inexplicitness</td>
</tr>
<tr>
<td>Emotions displayed</td>
<td>Low key</td>
</tr>
<tr>
<td>Time is of the essence</td>
<td>Trust is of the essence</td>
</tr>
<tr>
<td>Minimize time spent</td>
<td>Maximize personal interaction</td>
</tr>
<tr>
<td>First material, then personal</td>
<td>Personal, then material</td>
</tr>
<tr>
<td>Details and specifics</td>
<td>General framework</td>
</tr>
<tr>
<td>Get best deal possible</td>
<td>Harmony</td>
</tr>
</tbody>
</table>

Family and group are the prime considerations of Japanese culture as compared to materialism and financial status in the U.S. Consequently, Japanese individual preferences are readily sacrificed for the harmony of the family and group. Decisions are based on consensus to avoid conflict and preserve harmony, whereas only 51 percent need to reach a majority for a decision in the U.S. Japanese view U.S. individualism as a selfish social phenomenon, which connotes that a person gains by weakening the group. Furthermore, Japan practices a seniority system that equates age with wisdom, a tradition of further subordinating the individual to the group. Conversely, the U.S. culture recognizes and rewards individual achievement irrespective of age. Japanese workers identify themselves by their affiliation with a company and are assumed to share its goals because of their life-long loyalty and commitment to their employer (company). On the other hand, U.S. workers often take pride in changing jobs to demonstrate their marketability and even criticizing their own employers for wrongful/unethical/illegal practices. Thus, cultural predispositions can lead to unwarranted assumptions about members of the other nationality.

It appears that these cultural attributes strongly influence tourist consumer behavior. For instance, a Japanese tourist evaluates a tourism product differently as compared to his/her counterpart from the U.S. A prime consideration in evaluating different tourist destinations for vacationing is likely, for example, the effect their decision will have on the members of their group. Consequently, Japanese tourists spend more time in the decision-making process in order to examine the pros and cons of options as compared to those in the U.S. Japanese believe they preserve group harmony by selecting a tourist destination which is preferred by every one (unani-
mous decision). However, the implementation phase is speedier than in the U.S. because they want to avoid humiliating, offending or disturbing the harmony of the group (Ziff-Levine, 1990).

Fields (1983) has concluded that every moment of a Japanese tourist's day is briskly planned to maximize every moment from sunrise to sunset. It is intense from the perspective of velocity and volume of tourism pursuits. Conversely, the vacation of an average U.S. resident is designed to be relaxed and free from worry.

Despite these differences between U.S. and Japanese cultures, the two seem to blend remarkably well (Murakami and Go, 1990). With but little effort, U.S. tourism service providers can adjust to the culture of their Japanese guests by more carefully tailoring services to distinctive Japanese characteristics from which the norms of Japanese behavior are derived. When the Japanese visit a foreign country, they carry with them a variety of norms. In order to better understand Japanese tourists, it would be worthwhile to examine some basic elements in Japanese culture which influence their consumer behavior. These elements include the following: (1) belongingness, (2) family influence, (3) empathy, (4) dependency, (5) hierarchal acknowledgment, (6) propensity to save, (7) the concept of kinen, (8) tourist photography, (9) passivity, and (10) risk avoidance.

**Belongingness**

The Japanese are a very social and gregarious people. They place much emphasis on collectivism—being one with a group. There is strong pressure to be similar to everyone else. They do not wish to be left out of collective activities.

The tourism implication of this behavioral characteristic is nearly a total absence of privacy. Since the Japanese find comfort in togetherness, it is the reason why they do not venture to travel individually around the world. For instance, even newlyweds travel internationally on their honeymoon in groups of several dozen couples on organized package tours. During the spring and fall bridal seasons, a great majority of wholesale package tour participants are honeymoon couples.

Group travel is the norm in Japan whether such groups are based on formal organizations or voluntary association, or whether they are peer groups or of varied seniority.

Tourism marketers should facilitate Japanese group activities by providing appropriate facilities. Sightseeing personnel should avoid separating a Japanese group even for a short period of time. Efforts should be made to keep the group together as much as possible.
Family Influence

In contrast to a U.S. family, which includes only a husband, wife and children, a Japanese family includes all brothers, sisters, uncles, aunts, nieces, nephews, husbands, wives, children and parents. The extended family is the basis of identity and solidarity in the Japanese culture.

An important aspect of social organization which differentiates Japan from the U.S. is the relationship between the tourist and the members of his/her family left behind in Japan. The close relationship between the tourist and those left behind is always kept in mind by a number of devices. The strongest and most conscious of these is the senbetsu-omiyage relationship.

Prior to departure on an international tour, a Japanese traveler is given a farewell party, where the members of the family along with close friends and colleagues give cash as a present (senbetsu) and deliver speeches wishing a pleasant vacation and safe trip back home. Since well-wishers give presents prior to departure on an international tour, the tourist is then obligated to reciprocate by buying presents overseas. It is called the custom of omiyage, the remembrance gift (Graburn 1983). It is valued highly by most Japanese tourists who go abroad.

The tourist keeps track of how much money or how much in equivalent value has been given. Throughout the vacation, the tourist keeps these people in mind, especially at important tourist resorts where gifts must be purchased to take back home to Japan (omiyage), for each of those who had given (sebetsu). Ziff-Levine (1990) found that Japanese tourists spend 25 percent of their time shopping on a standard four-day trip.

The omiyage is governed by the following two principles (Graburn 1983): (1) it must be a culturally accepted symbol or souvenir of that particular destination/resort visited, and (2) it must cost approximately half of the senbetsu given, with some modifications as to the relative equality or hierarchical positions between the tourist and the gift-giver at home. Furthermore, the reciprocal gift must be tailored to the taste, usually the age and gender, of the donor of the senbetsu. After a Japanese tourist returns home, he hosts a party and there gives those presents to his loved ones using appropriate rituals.

The senbetsu-omiyage tradition is taught to children as young as those of kindergarten age. The volume of omiyage gifts is often so great that procedures for shopping and mailing them have become common in Japan and abroad. The people left at home are very aware of their colleague or friend who is about to leave, give senbetsu, and await the return to receive the appropriate omiyage.

Advertising directed toward the Japanese tourist market should include pictures of family involvement. Other promotional literature should make
direct appeals to likely decision-makers in the family other than the prospective consumer. Furthermore, free notebooks should be provided to Japanese tourists to help them keep records to fulfill the senbetsu-omiyage relationship. Ample time and opportunities for shopping must be provided.

**Empathy**

Empathy is the ability to put oneself into another’s shoes and project what that person is feeling. Genuine empathy requires that cultural predispositions be suppressed. A major barrier to empathy is the lack of awareness of important non-verbal cues within intercultural communication. Most non-verbal cues (facial expressions, posture, gestures, etc.) are interpreted differently in different cultures, and yet most people are unaware that their own non-verbal cues may be misinterpreted. Moreover, they are likely to misunderstand the non-verbal cues of people from other cultures (Kim 1988, Singer 1987).

One tourism implication of this behavioral phenomenon is that Japanese tourists rarely display displeasure even if they are not pleased with a tourism service or product. They save all complaints until they return home. They believe that expression of true personal feelings would be disruptive. Therefore, tourism personnel should receive training in cross-cultural communication (Krohn and Ahmed, 1991). They should be taught simple phrases in Japanese and made aware of the differences in non-verbal interpretations. Evaluation surveys should be administered to Japanese tourists only after they return home to facilitate their providing a more truthful evaluation.

**Dependency**

In Japan, several types of cultural dependencies exist. One example is the relationship between the employee and employer. In exchange for lifetime loyalty and devotion, the employer is expected to be continually aware of the well-being of his employee. The employer assumes a parental relationship. The parent-child relationship is a form of dependency wherein the employee (child) is often perhaps totally dependent on the employer (parent) for security and protection.

This dependency characteristic among Japanese is seldom understood among westerners who are usually taught to be independent and self-reliant. The tourism implication of this behavioral characteristic is that, unlike U.S. and European tourists who prefer to be left on their own, Japanese tourists demand constant attention and care. Consequently, all Japanese travel agents place great importance on even the smallest needs of their Japanese
clients. The large number of Japanese owned hotels in Hawaii, a major U.S. destination among Japanese tourists, is an indication of the Japanese belief that only they can fully meet the needs of the Japanese tourists.

In as much as Japanese employers exercise much more influence upon their employees than do U.S. employers, Japanese employers can be viewed as a viable target market for international tourism. Recommendations subsequently made by Japanese employers to their employees will be taken much more seriously than those made by others. Package tours developed to meet the needs of both employers and employees will likely be well received.

Hierarchal Acknowledgment

The Japanese are very conscious of social status. Their first rule of behavior is to stay in one's place. Determinants of a person's importance are sex, age, and position/occupation. One's social rank decides the manner in which one will be received and treated. In Japan, age plays a determining role in the social structure. Promotions are independent of merit and come, for the most part, with seniority (Holtzman et al., 1991). Tourism personnel should always identify one's position in business. For example, the Japanese always carry their business cards depicting their company affiliation and the position they hold. It is a common practice among Japanese tourists to address their host by the position held, such as Mr. Travel Agent, Miss Tour Guide, etc., indicating respect for the host's position (Machlin and Field, 1979).

Other manifestations of Japanese preoccupation with superiority/rank is their low regard for their less fortunate neighboring countries. Disdain toward "backward" peoples, including Asian neighbors, has been revealed through the rude behavior of Japanese tourists to South East Asia (Lebra, 1976).

Marketing recommendations would be for tourism employees to wear identifying uniforms or badges attesting to their status; the resort or hotel manager be personally present to welcome and bid farewell to Japanese tourists; and it is also advisable that such managers be older males as they will be viewed as high status individuals. Such a recommendation is clearly sexist, but it is highly likely that the number of upper-level management positions held by females will increase significantly as they gain more time and experience in the industry (Cornell Hotel and Restaurant Administration Quarterly, 1989). It is also highly likely that because of the international travel sophistication of Japanese tourists, they will more readily accept females as high status individuals, as well.
Propensity to Save

No other nationality saves a greater percentage of their income than the Japanese (Mente and Perry, 1967). Reasons for the high savings rate are the underdeveloped social welfare system, high educational goals, the high cost of housing, liberal tax policies, and the semi-annual bonus system. While those in the U.S. are more concerned about accumulating funds for retirement, the Japanese put more emphasis on building for an emergency fund and saving for a home (Japan Economic Institute, 1982).

Consumer policies are also affected by institutional policies. The Japanese wage system is characterized by the semi-annual bonus payment. Most Japanese companies pay employees a bonus twice a year and in large firms, the bonuses equal several month’s pay. Saving is encouraged by this system because the family budget is usually adjusted to what is normally received per month and the bonus is set aside for leisure pursuits such as international vacationing.

Japanese social and cultural influences on savings should also be considered. In the 19th century, the average person was led to believe in the “morality of austerity” and the “sinfulness of conspicuous consumption.” This attitude is still manifested today by the elderly Japanese who believe that one should buy only what is necessary.

The Japanese emphasis on building an emergency fund and saving for a home is a means to overcome feelings of basic insecurity. Consequently, tourism-related warranties, guarantees, and other risk-reduction strategies are likely to be effective.

As the Japanese continue to become more consumption oriented, especially with governmental and private efforts to spur international travel, a “travel now, pay later” approach could be applied to their bonuses. In cooperation with employers, employees could engage in employer-approved international travel prior to the bonus being paid. While older Japanese will resist such innovation, the younger, more consumption-oriented consumers should find such an arrangement appealing.

Kinen

Kinen is a key concept, which could be translated as “souvenir.” It is the legitimizing and commemorating of one’s visit to a particular tourist destination. Each tourist resort is expected to offer a number of kinen items, which are to be taken home to legitimize one’s visit. A knowledge of appropriate kinen is also necessary for legitimization. Each tourist destination/resort is supposed to be known for its meibutsu (literally, the things for which...
it is famous), its specialty or special attraction. It is from among these that omiyage and kinen must be obtained. Kinen, which are not to be given away, are equally important for self-legitimation. These are culturally approved evidence of travel to a prestigious tourist destination and engagement inappropriate activities during the visit.

Resorts, hotel gift shops, and other souvenir outlets catering to Japanese tourists should provide point-of-purchase indicators with special displays for goods that would be especially appropriate for kinen. Specially prepared boxes containing items suitable for kinen could be offered for sale. Such boxes might contain a variety of items of differing value, all higher quality items, or all lower quality depending on the quality of omiyage and kinen individual tourists might desire.

Tourist Photography

One of the major characteristics of a Japanese tourist’s photography is to have a picture of oneself taken in front of a tourist site, the kinen shashin, or memorial photo. This is achieved in one of two ways. For larger groups, official photographers are arranged at important sites to take formal group portraits, and for smaller groups, couples, and individuals, one hands one’s own camera to someone else to take a similar photo. The photographer may be another tourist, a merchant, or taxi-driver. In fact, a mere photo of the site without the individual or members of the group renders any photo invalid as kinen-shashin. Because of the importance of photography to the tourist system, senbetsu money is often used for film, or a new camera may be a form of senbetsu in itself.

Japanese tourists should be provided with ample time to engage in picture-taking. Tour operators should make arrangements to insure that film is readily available at all time for their Japanese clients. Tourism personnel should be taught fundamentals of photography and readily offer to take pictures using the tourists’ cameras. Group pictures should be taken regularly during a tour and given or sold to the tourists at the conclusion of the tour.

Passivity

Most older Japanese tourists are passive tourists. For instance they do not participate in outdoor recreation activities while traveling internationally. They prefer to watch others surfing, water skiing, canoeing, white-water rafting, hunting, and so forth. Though the younger generation is trying to follow the U.S. style outdoor recreation oriented vacationing and can be seen surfing, skiing and boating, older Japanese try to avoid participation in physical activities especially in unfamiliar cultures.
In the egalitarian U.S., everyone is encouraged to participate in leisure pursuits. Tour operators should be aware that older Japanese people should not be urged to participate but rather provided comfortable seating where they can readily observe the action being performed by younger people.

Risk Avoidance

The older generation of Japanese tourists also wish to avoid adventurous leisure pursuits, where risk and/or danger to life is imminent such as scuba diving, mountaineering, exploring unknown destinations such as Amazon forests, and so forth. Contrary to their domestic lifestyle, the younger generation is pursuing adventurous activities with new vigor. This pursuit should not be interpreted as disregard for life and limb but rather as similar to the safe but thrilling experience of a roller coaster ride. It is intermingling of the seemingly dangerous with the psychological certainty of safety that makes such experiences so pleasurable. Tourism marketers can readily meet the increasing safety concerns of Japanese tourists with oral and written assurances, citing safety records, testimonials from other Japanese, and other credibility enhancement devices. By so doing, the cultural predisposition to avoid risk can be overcome without losing the interest of younger Japanese consumers of international tourism.

CONCLUDING REMARKS

Japan has emerged as Asia's leading generator of international tourism after making an enormous transition from a passive society to one of the world's leading economic powers. Since millions of contemporary Japanese are traveling around the world, there are opportunities to be tapped by U.S. tourism suppliers by appreciating the unique consumer behavior of Japanese tourists and adjusting their marketing-mix accordingly. Such an appreciation and adjustment, if properly planned and managed, can significantly help in balancing the unfavorable balance of payments position of the U.S. in its trade with Japan. By attracting the optimum number of Japanese tourists to U.S. tourist destinations and sending them back as satisfied and brand-loyal clients, all the participants in the endeavor stand to benefit.

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EMERGENCE OF JAPAN AS OVERSEAS LEADING GENERATOR OF INTERNATIONAL TOURISM FOR THE UNITED STATES

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The decade of the 1980s will be remembered in the annals of international tourism for the emergence of Japan as one of the major generators of global tourism on the face of the earth. This paper offers marketing tips to U.S. tourism firms on how to take advantage of the surge of global vacations by Japanese tourists in an era of economic recession and also help the U.S. in reducing its trade deficit with Japan by Japanizing their operations.

Introduction

Japan is the supplier of the largest number of overseas international tourists to the U.S. and the U.S. holds the position as the top Japanese international tourist destination (see Tables 1 & 2). For the U.S., international tourism is the second largest source of earning foreign exchange (see Table 3). What attracts the Japanese to the U.S. is the low value of the U.S. dollar in comparison to the yen, moderate inflation, relatively low gasoline prices, and an abundance of shopping opportunities nationwide. Consequently, it is desirable and less expensive for the Japanese to visit the U.S. than most other industrialized nations of the West [Uddin and Krohn 1990].

Japan has emerged as Asia’s leading generator of international tourism after making an enormous transition from a passive society to one of the world’s leading economic super powers. Since millions of contemporary Japanese are traveling around the world because of higher affluence and more leisure acquired in the post second world war period, there are opportunities to be tapped by U.S. tourism suppliers. They can do it by appreciating the importance of treating Japanese differently than other international tourists because of their different activities, interests, and opinions (A.I.Os) as compared to other international tourists. Treating every international tourist with the similar marketing mechanism is unstrategic.

Review of Literature & Statement of Purpose

Japan has been the focus of research in contemporary tourism literature because of its emergence as one of the distinguished generators and consumers of international
TABLE 1
POPULAR INTERNATIONAL TOURIST DESTINATIONS FOR JAPANESE IN 1988

<table>
<thead>
<tr>
<th>Destinations</th>
<th>Number of Tourists</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ASIA</strong></td>
<td></td>
</tr>
<tr>
<td>People's Republic of China (N)</td>
<td>591,929</td>
</tr>
<tr>
<td>Hong Kong (R)</td>
<td>1,240,470</td>
</tr>
<tr>
<td>India (R)</td>
<td>49,244</td>
</tr>
<tr>
<td>Indonesia (N)</td>
<td>N.A.</td>
</tr>
<tr>
<td>South Korea (N)</td>
<td>1,124,149</td>
</tr>
<tr>
<td>Macau (N)</td>
<td>318,759</td>
</tr>
<tr>
<td>Malaysia (R)</td>
<td>154,376</td>
</tr>
<tr>
<td>Philippines (R)</td>
<td>181,681</td>
</tr>
<tr>
<td>Singapore (R)</td>
<td>682,405</td>
</tr>
<tr>
<td>Taiwan (N)</td>
<td>917,161</td>
</tr>
<tr>
<td>Thailand (N)</td>
<td>449,086</td>
</tr>
<tr>
<td><strong>EUROPE</strong></td>
<td></td>
</tr>
<tr>
<td>Austria (R)</td>
<td>166,215</td>
</tr>
<tr>
<td>France (R)</td>
<td>631,518</td>
</tr>
<tr>
<td>Greece (N)</td>
<td>105,000</td>
</tr>
<tr>
<td>Italy (N)</td>
<td>384,850</td>
</tr>
<tr>
<td>Netherlands (R)</td>
<td>N.A.</td>
</tr>
<tr>
<td>Spain (N)</td>
<td>170,292</td>
</tr>
<tr>
<td>Switzerland (R)</td>
<td>397,739</td>
</tr>
<tr>
<td>United Kingdom (R)</td>
<td>N.A.</td>
</tr>
<tr>
<td>West Germany (R)</td>
<td>621,363</td>
</tr>
<tr>
<td><strong>AMERICAS</strong></td>
<td></td>
</tr>
<tr>
<td>Canada (R)</td>
<td>329,600</td>
</tr>
<tr>
<td>U.S.A. (R)</td>
<td>2,542,140</td>
</tr>
<tr>
<td>(Guam) (R)</td>
<td>493,543</td>
</tr>
<tr>
<td>(Hawaii) (N)</td>
<td>1,358,000</td>
</tr>
<tr>
<td><strong>OCEANIA</strong></td>
<td></td>
</tr>
<tr>
<td>Australia (R)</td>
<td>352,200</td>
</tr>
<tr>
<td>New Zealand (R)</td>
<td>33,789</td>
</tr>
</tbody>
</table>

Source: World Tourism Organization (WTO), Pacific Asia Travel Association (PATA), Organization for Economic Co-operation and Development (OECD) and national tourist offices in Tokyo.

Notes: (H) Arrivals at tourist accommodations. (R) By residence. (N) By nationality. (A) Arrivals at registered tourist accommodations. Estimated figures. (b) Estimated by Hawaii Visitors Bureau. N.S.: Not available.

TABLE 2
TOP OVERSEAS TOURIST GENERATING COUNTRIES FOR AMERICA

<table>
<thead>
<tr>
<th>Rank</th>
<th>Country</th>
<th>Number of Tourists</th>
<th>% Change From 1989</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Japan</td>
<td>3,231,495</td>
<td>+4.9%</td>
</tr>
<tr>
<td>2</td>
<td>U.K.</td>
<td>2,243,792</td>
<td>+9.9%</td>
</tr>
<tr>
<td>3</td>
<td>Germany</td>
<td>1,202,826</td>
<td>+11.7%</td>
</tr>
<tr>
<td>4</td>
<td>France</td>
<td>716,036</td>
<td>+9.5%</td>
</tr>
<tr>
<td>5</td>
<td>Australia</td>
<td>465,505</td>
<td>+14.5%</td>
</tr>
<tr>
<td>6</td>
<td>Brazil</td>
<td>398,484</td>
<td>+19.4%</td>
</tr>
<tr>
<td>7</td>
<td>Italy</td>
<td>395,783</td>
<td>+11.5%</td>
</tr>
<tr>
<td>8</td>
<td>Bahamas</td>
<td>324,255</td>
<td>-3.2%</td>
</tr>
<tr>
<td>9</td>
<td>China*</td>
<td>305,082</td>
<td>+27.1%</td>
</tr>
<tr>
<td>10</td>
<td>Switzerland</td>
<td>293,652</td>
<td>+6.8%</td>
</tr>
</tbody>
</table>

Source: U.S. Travel and Tourism Administration, December 1990.

*It includes both Taiwan and People's Republic of China.

TABLE 3
INTERNATIONAL TOURISM AS AN EXPORT COMPARED TO OTHER MERCHANDISE EXPORTS IN AMERICA

<table>
<thead>
<tr>
<th>Top 4 Commodity Sections</th>
<th>Exports &amp; International Travel (In $ Billions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Machinery &amp; Transport Equipment</td>
<td>$175.5</td>
</tr>
<tr>
<td>International Travel to the United States**</td>
<td>$52.8</td>
</tr>
<tr>
<td>Miscellaneous Manufactured Intern</td>
<td>$39.3</td>
</tr>
<tr>
<td>Chemicals &amp; Related Products</td>
<td>$39.0</td>
</tr>
<tr>
<td>Agricultural Goods</td>
<td>$38.8</td>
</tr>
</tbody>
</table>


*The $393.9 Billion figure excludes the $52.8 Billion spent on international travel to the United States. Travel is a service export.

**International travel receipts is a service export and not a merchandise export. But if it was compared to the 1990 merchandise exports, above is its ranking.

dictates a global marketing approach modified by localized elements embracing cultural values inherent in the target population. Polunin (1989) has outlined the factors

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responsible for the growth of international tourism in Japan. Graburn (1983) has discussed the socio-cultural structure of Japanese domestic tourism. Lin (1990) has examined the factors responsible for the emergence of Taiwan as one of the most popular tourist destinations among Japanese tourists.

In spite of the above contemporary studies conducted, no research has been done examining how Japanese tourists should be treated differently than other international tourists. Apart from examining the factors responsible for the emergence of Japan as the top generator of international tourism in Asia, this paper will suggest certain marketing tips which U.S. tourism suppliers and the government should employ to attract an optimum number of Japanese tourists in the foreseeable future. The U.S. has been selected as a case study because international tourism affords it the opportunity to balance its unfavorable balance of payment position with its largest trading partner (Japan). Besides being the most preferred tourist destination among the Japanese, the U.S. has more potential than other international destinations to attract an optimal number of Japanese tourists in the foreseeable future by virtue of the tremendous expansion capacity of its tourism industry.

The factors responsible for the emergence of Japan as the largest generator of international tourism in Asia have been examined in detail. They range from: (1) higher affluence, (2) recognition and growth of leisure, (3) internationalization of Japanese society, (4) appreciation of Japanese currency [yen], (5) opportunity to shop internationally, (6) and the formulation and execution of the "Ten Million Program".

Higher Affluence

The single most important factor responsible for the emergence of Japan as Asia’s leading generator of international tourism is the higher affluence acquired by the Japanese population in general as a result of the economic boom, and higher savings rate leading to the emergence of Japan as one of the economic super powers of the world (see Table 4). The continuous surplus in Japan’s trade with its major trading partners such as the U.S. has helped Japan in accelerating the pace of economic growth, paving the way for higher quality of life for its citizens. Hence contemporary Japanese can afford to vacation internationally, which their predecessors did not.

Recognition and Growth of Leisure

Today, after decades of workaholism, the Japanese are finally learning how to enjoy life by pursuing leisure.

<table>
<thead>
<tr>
<th>Nation</th>
<th>% of GDP *</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. United States</td>
<td>7.90</td>
</tr>
<tr>
<td>2. United Kingdom</td>
<td>8.58</td>
</tr>
<tr>
<td>3. Germany</td>
<td>14.18</td>
</tr>
<tr>
<td>4. France</td>
<td>12.74</td>
</tr>
<tr>
<td>5. Japan</td>
<td>20.69</td>
</tr>
</tbody>
</table>

Leisure is now becoming serious business, and some are pursuing it with the same drive as their jobs. To increase leisure travel, a reduction of working hours is a prerequisite. This process was facilitated by the enactment of an amendment in the Labor Standards Act in 1988, which stipulated (1) phased reduction of legal working hours toward the goal of a 40-hour work week, which is equivalent to a 5-day work week; (2) more flexible legal controls on working hours such as introduction of flex-time, and (3) improvement of paid vacation system. Thus, the legal framework is complete and Japan is heading toward the establishment of a regular 5-day work week (Wall Street Journal 1990). Moreover, public relations activities to promote consecutive holidays and active leisure time activities are underway. As a consequence of these governmental measures, the Japanese society, as a whole, is sure is now becoming serious business, and some are stepping toward a more leisurely future.

All of these socio-economic changes in the lifestyles of the Japanese have led to the consumption of more international tourism products as a pursuit of leisure. After the monetary liberalization for the growth of international travel in 1964, the drive for international travel has continued to grow dramatically, encouraged by the Japanese firms’ widespread practice of granting workers large bonuses once or twice a year in order to enable them to vacation internationally and pursue other leisure activities of their choice.

Internationalization of Japanese Society

The word internationalization reflects the mood of technological and educational development. Innovations in
these areas; which have come from the West in general and the U.S. in particular, are evident everywhere in Japan. The historical links of the U.S. and the Japanese people trace back to the late 19th and to the early 20th century when large immigration of Japanese to the West Coast of the U.S. took place.

Japan abandoned Europeanization and adopted Americanization after the end of second world war and their partnership with the U.S. has grown since then. It was Gen. MacArthur, Supreme Commander of the Allied Forces in the Far East, who began his mission of Americanizing the Japanese society. He practically changed Japan from top to bottom. The right to vote was extended to women when he gave the country the constitution of true democracy. Changes in the educational system, revision of wage and work-hour laws, and encouragement of strong unions were some of the changes Gen. MacArthur introduced in Japan. It is a strange paradox of history that the U.S. defeated Japan militarily in the Second World War by dropping two atomic bombs, which caused enormous havoc, devastation and deaths to the Japanese people, but on the other hand, the same U.S. has been responsible for revolutionizing Japan economically, technologically, politically and socially. Right up to the signing of the 1951 San Francisco Peace Treaty, which gave Japan her independence, the Japanese continued to apply American rules and regulations. And even since then, America has remained their prime point of reference [Delassus 1972].

There are few countries such as Japan in the world, which are more committed to the basic American values of freedom, democracy, capitalism and the rule of law [Kirkpatrick 1991].

Even today Japan looks up to the U.S. for its economic might, technological superiority and global status. In Japan, one cannot deny the American influence on the country. Adoption of baseball and golf as national games since 1945, and style of dressing for both men and women, for instance, are some of the manifestations of Americanization of Japan's socio-cultural fabric. American power and achievements are objects of genuine admiration in Japan. In general, the U.S. has maintained a good public image to the Japanese, and is, in fact, the nation most admired. All of these have contributed to the emergence of the U.S. as the most popular tourist destination for international vacations in Japan (see Table 1).

Appreciation of Japanese Currency (Yen)

The yen took a sudden strong turn as a consequence of the monetary agreement between the five most industrialized countries in the world (G-5: U.S., Japan, Germany, France, and Britain). The G-5 countries resorted to this extraordinary measure because of the need to find a solution for the adverse balance of payments position between member countries and Japan. Consequently, Japanese goods and services became costlier around the world and international products such as international travel became cheaper in Japan.

The tremendous spending power of a Japanese tourist, because of the appreciation of the yen against major international currencies, has been one of the major factors contributing to the growth of outbound international tourism in Japan in recent years. Price is still the biggest incentive for a Japanese tourist to vacation internationally in general and the U.S. in particular because of the continuous appreciation of the yen and depreciation of the dollar throughout the decade of 1980s as illustrated by Figure 1. Figure 1 shows that as a result of currency rate decline (it is $/y), tourist arrivals from Japan to the U.S. has increased. A tourist can vacation in Hawaii for 15 days for less than it costs to vacation in Japan. Japanese tourists feel that the low cost of vacations in the U.S. is another "wonder of the world" to explore. Because of the appreciation of the yen, more than one quarter of the entire Japanese population of over 121 million can afford international tours in contemporary Japan. Since group travel is less expensive, and Japanese prefer to travel in groups, it is less expensive for them to travel than for westerners who prefer to travel individually.

Opportunity to Shop Internationally

While traveling internationally, Japanese love to shop and spend a lot of their savings. The average tourist spends nearly Y100,000 ($750) on shopping on each international trip (Economist 1988). Japanese tourists have the highest newly confident Japan, which is coming out into the world from its former shy and reticent international position. Outbound international tourism is a direct beneficiary of the internationalization process which has influenced every sphere of contemporary Japanese life.

Japan has always looked to the West, especially the spending per person by any tourist in the world. There are many reasons for this phenomenon. First, the Japanese government allows them to bring home goods up to $1,500 from each international trip (this is the highest in the world). Second, shopping internationally is cheaper for U.S., for ideas and technology for its political, economic, then when they can buy duty-free in Hong Kong, Singapore, etc. The third reason is their preference for fashion as they wish to buy the latest fashions of the west. Tour groups have stripped markets of painted wooden dolls and Mongolian blankets in New York City. If they are on the West Coast, left over cash is spent in duty-free shops in
Figure 1 the Effect of Exchange Rate on U.S. Travel from Japan, 1980-1990

Source: U.S. Travel & Tourism Administration (USTIA), Dept. of Commerce, Washington, D.C. October 1990

Table 5

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>BILLIONS IN U.S. DOLLARS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Japan</td>
<td>-41.1</td>
</tr>
<tr>
<td>2. Taiwan</td>
<td>-11.2</td>
</tr>
<tr>
<td>3. China</td>
<td>-10.4</td>
</tr>
<tr>
<td>4. Germany</td>
<td>-9.4</td>
</tr>
<tr>
<td>5. Canada</td>
<td>-7.5</td>
</tr>
<tr>
<td>6. Venezuela</td>
<td>-6.3</td>
</tr>
<tr>
<td>7. Saudi Arabia</td>
<td>-5.9</td>
</tr>
<tr>
<td>8. Nigeria</td>
<td>-5.4</td>
</tr>
<tr>
<td>9. Italy</td>
<td>-4.7</td>
</tr>
<tr>
<td>10. South Korea</td>
<td>-4.1</td>
</tr>
</tbody>
</table>

America's Total Annual Deficit -101.0


Anchorage, Alaska. The fourth reason is that the Japanese have the highest savings rate in the industrialized world, (see Table 4), and they wish to spend it on shopping for their favorite items while traveling internationally. The fifth reason is their customs of Omiyage and Senbetsu. Omiyage is the term that refers to the obligatory feeling that they have to return to Japan with gifts for their friends, family, or colleagues. Senbetsu relates to giving cash as a gift to friends, relatives and colleagues when they are leaving for international travel. When tourists receive these gifts, they are supposed to return with something at comparable price.

Ten Million Program

The last major factor responsible for the tremendous growth of international tourism in Japan is the discovery by the Japanese government that an incentive to encourage Japanese to travel internationally could be used to counter the trade surplus problem with its major trading partners, such as the U.S. U.S. registered a trade deficit of $41 billion with Japan in 1990 (see Table 5).

The Ten Million Program was launched by the Ministry of Transport (MOT) in September 1987 with the goal to double the number of Japanese people traveling internationally from 5.5 million in 1986 to 10 million in 1990. Various measures have been taken to promote international travel by the Japanese government. For instance, in November 1987, the Overseas Travel Promotion Forum was organized to promote the program at a non-governmental level. Through these efforts, together with the lowered travel cost brought about by the yen appreciation, the MOT was able to accomplish its goal of sending 10 million Japanese abroad in 1990, when 10.9 million Japanese traveled internationally. Japan is the only country in the world, whose government has earmarked funds and established an official mechanism directed at motivating Japanese to vacation internationally. This unique program has been welcomed by foreign countries and international organizations such as the World Tourism Organization.

The promotion of Japanese international travel is effective not only in developing mutual understanding and a sense of international citizenship, but also in contributing to the economic growth of other countries and solving the imbalance of international trade between Japan and its major trade partners such as the U.S. To keep a stable position in the international community, where interdependence is deepening, the promotion of international travel by Japanese people is becoming more important.

The Department of Tourism and The Bureau of International Transport and Tourism are the two agencies within the federal Ministry of Transport (MOT) responsible for the growth and development of outbound international tourism in Japan. The MOT, by implementing the said program, was able to accomplish its goal of facilitating the outflow of 10 million Japanese tourists embarking upon international vacation one year ahead of schedule. The measures which led to the accomplishment of this goal are outlined in Table 6.
TABLE 6
MAJOR CHARACTERISTICS OF
TEN MILLION PROGRAM

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. MOT has been conducting a publicity campaign encouraging the Japanese to vacation internationally.</td>
<td></td>
</tr>
<tr>
<td>2. MOT has been inviting foreign government tourism officials to Japan every year for signing the agreements aimed at ameliorating the barriers of travel of Japanese tourists to their countries.</td>
<td></td>
</tr>
<tr>
<td>3. The MOT has helped in the establishment of an information network on international travel by aiding marketing efforts of foreign tourist organizations in Japan.</td>
<td></td>
</tr>
<tr>
<td>4. Japanese government has negotiated the abolition of visa with other countries on reciprocal basis to facilitate global travel of its citizens. Abolition of visas between the U.S. and Japan for a trial period of three years is the direct outcome of this endeavor (Ahmed and Krohn 1990).</td>
<td></td>
</tr>
<tr>
<td>5. The Japanese government has increased the tax privileges to promote international travel by raising the tax-exemption limit for travel expenses. To encourage the purchase of souvenirs in foreign countries, the government raised the tax-exemption limit for souvenirs from Y100,000 ($750) to Y200,000 ($1500) in July 1987.</td>
<td></td>
</tr>
<tr>
<td>6. The MOT has encouraged the use of local airports for international flights by promoting charter flights to and from those airports.</td>
<td></td>
</tr>
</tbody>
</table>


Where the U.S. Fits in the Picture

Hong Kong and South Korea are the most popular tourist destinations for Japanese tourists in Asia, but the tourism infrastructure in these destinations is hard pressed to keep up with the expected growth in Japanese tourism in the 1990s and beyond. Nearly 592,000 Japanese tourists visited China in 1988 (see Table 1), but they are now avoiding China because of the massacre of thousands of innocent Chinese. Moreover, they are disinterested as a result of the grave violations of human rights and the crackdown by the Chinese government against the democracy movement. The shortage of accommodations in Asia is inducing Japanese tourists to visit the U.S. However, except for Los Angeles, San Francisco, Las Vegas and New York City, the U.S. is not prepared to accommodate a large number of Japanese tourists. International destinations that can offer services tailored specifically to the Japanese tourists will be the winners in their marketing endeavors to lure an optimum number of Japanese tourists in future.

Most U.S. and Japanese tourists have one thing in common: they are multilingual. This situation poses many problems for Japanese tourists in the U.S., but less so for the American tourists visiting Japan. When an American tourist arrives in Japan, most of the cab drivers speak English and hotels have English-speaking front desk personnel. Most of the major Japanese hotels can change the U.S. dollar to the Japanese yen without any extra charge and are pleased to accept U.S. credit cards. Any bank in any part of Japan can accept U.S. dollars and exchange them for the Japanese yen. Most of the major hotels and restaurants have American menus featuring steak and hamburger. Guidebooks or local tourist information available is multilingual (English, French etc.). Secretarial support in English can be arranged. Translations and other business services can also be made available in English. They can inform a U.S. tourist about those establishments which have English-speaking staff such as shops, gas stations, police stations, buses, trains and airlines. They can even provide CNN on television.

Contrary to the above mentioned scenario of the Americanization of Japanese tourism operations, most of the U.S. tourism firms catering to the large Japanese clientele have not Japanized their operations. Since tourism is the second largest earner of foreign exchange for the U.S., (see Table 3), and Japan is already the supplier of the largest number of overseas tourists to the U.S., (see Table 2), the U.S. government and the U.S. tourism firms should consider treating Japanese tourists differently because of the tremendous potential Japan offers in terms of future growth, and the highest deficit the U.S. has in its international trade with Japan (see Table 5). Japan's outbound international tourism is expected to register the highest growth in the world as compared to other major generators on international tourism in the foreseeable future, providing the U.S. an ample opportunity to tap into the gold mine of international tourism because of its most favorable international tourist destination status in the Japanese society, and the tremendous potential of its growth.

Japanese tourists should not be treated as any other international tourist. They offer a great opportunity to the U.S. in building bonds of trust, friendship and goodwill between the people of the two largest trading partners in the world. International tourism affords an opportunity to the U.S. to convince visiting Japanese with the greatness of America's free market enterprise system, free trade and open international competition, where Japanese products are not subjected to punitive levies, duties and taxes, but are treated at par with American products by the government, industry and consumer. Such an understanding would help in bridging a communication gap between the people of the two friendly countries. Certain vested interests in Japan are resisting governmental attempts to open up Japan to foreign competition in general and U.S. corporations in particular.
Millions of satisfied and pleased Japanese travelers could act as opinion-influencers, forcing the Japanese government to adopt free trade on the pattern of the U.S., thus eliminating the last barrier to improved U.S.-Japanese political relations. This phenomenon has assumed more importance because of the recent emergence of Japan bashing in the U.S.

Such Japanization also becomes more imperative because of the fact that Americans are curtailing their vacations in the current era of recession, which has adversely affected the American tourism industry, causing enormous financial losses to tourism firms and layoffs to tourism employees in the early 1990s. There are many measures the U.S. tourism firms could consider in order to "Japanize" their operations with the goal of sending a satisfied consumer back to Japan. Such a satisfied consumer, besides influencing the opinions, perceptions and images of his/her relatives, friends, colleagues, and neighbors about the U.S., may also bring more tourism business to the U.S. by repeating his/her visit, which will go a long way in helping to build brand loyalty. The following are some marketing tips:

1. Japanization of operations of American tourism firms also becomes imperative because of the uniqueness of Japanese "tourists" consumer behavior. For instance, every moment of a Japanese tourists' day is briskly intense and planned to maximize every minute of vacation from sunrise to sunset. It is intense from the perspective of velocity and volume of tourism pursuits. Conversely, the vacation of an average international tourist hailing from the western hemisphere is designed to be relaxed and free from worry [Fields 1983]. There are opportunities to be tapped by American tourism suppliers by understanding and appreciating the uniqueness of Japanese tourists' consumer behavior and adjusting their operations accordingly.

2. Hospitality firms hosting large numbers of Japanese tourists should consider providing Japanese-speaking staff 24-hours a day.

3. The United States Travel and Tourism Administration (USTTA) should provide airport greeting staff fluent in Japanese at those airports which regularly receive a large number of Japanese tourists in order to assist them with arrivals, baggage handling, currency exchange, transfers and ground transportation.

4. Tourism suppliers should consider providing special rooms with Japanese in-room amenities, such as green tea and Yakatas (bathrobes).

5. Hotels and restaurants should provide Japanese food on their menus, which should be printed in the Japanese language along with English.

6. Hotels and motels should consider providing communication services in Japanese.

7. Tourism establishments should develop a mechanism to exchange currency, traveler's checks and credit cards in yen without any extra charge.

8. Tourism companies should provide multilingual telephone instructions.

9. Tourist destinations and firms should print tourist literature in the Japanese language.

10. Major hotels in San Francisco, Los Angeles, Las Vegas, New York City, Chicago, Niagara Falls, Miami, Houston, Disneyland and Disney World etc., which are visited by most of the Japanese tourists, should consider providing a weekly Japanese magazine and newspaper at the newspaper stand.

11. Tourism firms should consider approaching the American Hotel and Motel Association (AAMA) Educational Institute on the campus of Michigan State University in East Lansing, Michigan, to develop a training program on Japanese hospitality on the pattern of "International Hospitality."

12. Tourism firms, local government, local business community and local residents should establish a platform coordinating their efforts in order to provide a conducive and cordial atmosphere for hosting the Japanese tourists. For instance, most of the small banks across the country do not accept foreign currency, traveler's checks, and credit cards. Such a platform should convince these banks to change their policies in order to be more receptive to Japanese tourists.

Concluding Remarks

Japan has made an enormous transition from a passive society to one of the world's leading economic, technological and industrial powers. Now that the Japanese are taking the time to enjoy leisure through international vacations, there are opportunities to be tapped by Japanizing the operations of U.S. tourism firms. International tourism offers great opportunities to the U.S. to contribute in balancing the unfavorable balance of payments position in its trade with Japan. How the U.S. tourism industry, in cooperation with the federal, state, county, city and village governments, can benefit from the surge of global vacations by Japanese tourists, is a marketing challenge worth implementing in an era of economic recession before other international competitors do so.

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Marketing India as a tourist destination in North America—challenges and opportunities

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The purpose of this paper is to demonstrate how effective marketing can be employed by India’s tourist department to attract North American tourists. It is found that Indian tourism marketers have traditionally attempted to ‘sell’ their services rather than market them. Seven specific steps are recommended for increasing tourism to India: (1) improving the image; (2) identifying target markets; (3) strategically locating tourist offices; (4) developing promotional themes; (5) correcting attitudinal problems; (6) improving product strategy; and (7) promoting India as a convention destination. It is concluded that the Indian Government must attend to all seven steps before being able to significantly improve their ability to attract North American tourists.

Key words Indian tourism tourist destination North American tourism

Introduction

India has been a destination to international tourists for hundreds of years because of the uniqueness of its culture, richness of its civilization, unparalleled hospitality of its people, glorious heritage, and fascinating outdoor recreation opportunities. Tourism in India today is rapidly changing, trying to inform the world that it offers a veritable cornucopia of nature, culture, and history. Besides being one of the top economic priorities of the government, tourism in contemporary India has emerged as the largest source of foreign exchange earnings and a multi-billion dollar industry, generating enormous revenue in taxes and millions of jobs for the teeming population of the country (Ahmed, 1991[a]; Dev and Kuckreja, 1989; International Tourism Reports, 1986).

India is mainly dependent on Western Europe and North America for its tourism
business, which collectively contribute over 54% of the tourist traffic. Though in terms of numbers, international tourist arrivals in India are not as impressive as those of its neighboring countries such as Thailand, Singapore, and Malaysia (see Table 1) the average stay of tourists in India is six times longer than its neighbors-competitors. An international tourist stays an average of 28 days in India. About 92% of the international tourists who travel to India make their own travel arrangements independently (non-package tourists). About 43% of the tourists visit India for pleasure, 25% for business, and 11% for visiting friends and relatives. Tourists below the age of 30 are predominantly pleasure seekers. There are 58 destinations, which are mostly patronized by international tourists, with the Taj Mahal in Agra among attractions and Delhi among cities as the prime destinations (Know India: Newsletter of Indian Tourism, 1989).

Marketing Indian tourism reflects the complexities of the multi-cultural nation itself. On the one hand, India has one of the largest tourism marketing budgets and tourism forces in the world (Department of Tourism, 1990) to promote their enormous variety, diversity and richness of tourist attractions. On the other hand, the number of tourists attracted by India are far fewer than many tiny nations in the South East Asian region. For instance, India registered only 1.66 million tourist arrivals compared to Thailand's 4.74 million in 1989 (see Table 1). Lack of attention to marketing prerequisites may be responsible for this poor state of affairs. This paper examines these prerequisites with respect to the marketing of Indian tourism in the United States (U.S.) and Canada (North America).

The discipline of marketing is a broad-based field encompassing a wide range of topical concerns. Ever since Levitt (1975) proposed broadening the marketing concept, marketers have been concerned with satisfying consumer wants and needs in four specific areas: (1) the product or service itself, (2) the price to be paid by consumers, (3) where and how the product or service will be made available to consumers, and (4) advertising and promotion, which was formerly the only concern of the marketing function (Kotler, 1977).

It is not unusual to confuse 'selling' their products and services rather than attempting to market them. Tourist destination marketers are not an exception because many attempt to sell whatever they happen to have in their countries rather than isolate those benefits that are sought by potential consumers and promote them effectively.

<table>
<thead>
<tr>
<th>Country</th>
<th>Total arrivals (millions)</th>
<th>Tourist receipts ($U.S. millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thailand</td>
<td>4.738</td>
<td>3120</td>
</tr>
<tr>
<td>Singapore</td>
<td>4.385</td>
<td>2399</td>
</tr>
<tr>
<td>Malaysia</td>
<td>3.673</td>
<td>1766</td>
</tr>
<tr>
<td>India</td>
<td>1.655</td>
<td>1500</td>
</tr>
<tr>
<td>Indonesia</td>
<td>1.134</td>
<td>1028</td>
</tr>
</tbody>
</table>

Marketing India as a tourist destination

Implications

India should consider seven important steps before being able to attract international tourism-consumers. The seven steps can be summarized as: (1) improving the image; (2) identifying target markets; (3) strategically locating tourist offices; (4) developing promotional themes; (5) correcting attitudinal problems; (6) improving product strategy, and (7) promoting India as a convention destination.

Improving the image

Image is commonly defined as the mental picture created when one is exposed to a particular stimulus. The image of the product or service in the minds of consumers greatly affects their acceptance or rejection of it. Thus, the manipulation of that mental image becomes a major concern for marketers (Davidoff and Davidoff, 1983). The mental picture created in the mind of the potential tourism-consumer is not necessarily the same as that of the tourism marketer. Even though the tourism marketer may have more accurate first-hand knowledge of the product, prejudices and pre-conceptions in the mind of the potential consumer must be taken into consideration. There is appreciable evidence that image influences a tourist’s decision-making process when he or she considers alternative destinations for touring experiences (Ahmed 1991[b]; Fridgen, 1984; Gartner and Hunt, 1986; Goodrich, 1978; Hunt, 1975; LaPage and Cormier, 1977; Mayo, 1975). Hence a destination marketer has to ensure that a favorable image exists before motivating his clientele to undertake tours.

Most of the information available in North America about India in the form of news (Roy, 1989; Strout, 1967), feature articles (Scofield, 1963; Silverstone, 1965), tourist guides (Fodor, 1989), school textbooks (India Abroad, 1988[a]) and tourism texts (Lundberg and Lundberg, 1985) has often portrayed a negative image of India. These sources of information usually emphasize what India does not have rather than what it does have. Managers of these sources of public information appear to reinforce the stereotyped image of India either out of ignorance or maliciousness. They often seem to emphasize the negative aspects of India’s culture and civilization based on sensational, crude and outlandish aspects of Indian life. This prejudice jeopardizes the efforts of India’s tourism marketing strategists to motivate North Americans to visit India. For instance, an article on the front page of the Wall Street Journal (1989) reported vivid horror stories gleaned from Indian newspapers that were sure to frighten all but the most seasoned and experienced tourist. In as much as most North Americans live in comfort and safety, such stories often deter even the consideration of a trip to India.

While assessing Americans’ perceptions about India as a possible vacation destination, Kale and Weir (1986) found twelve major factors responsible for the negative image of India in the U.S. (see Table 2). They range from poverty (41.6%) to language barriers (7.9%).

Identifying target markets

Once the benefits of a region are similar to the image held by the potential target markets, the tourism marketer must consider target marketing to a more precise audience: those most likely to be interested and able to actually purchase a trip to the tourist destination (Burke and Resnick, 1991). Differentiating markets thus becomes an important means by
Table 2. Major reasons for not visiting India

<table>
<thead>
<tr>
<th>Reason</th>
<th>Number mentioning</th>
<th>Per cent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poverty/beggars</td>
<td>37</td>
<td>41.6</td>
</tr>
<tr>
<td>Politically unstable</td>
<td>25</td>
<td>28.1</td>
</tr>
<tr>
<td>Not clean</td>
<td>24</td>
<td>27.0</td>
</tr>
<tr>
<td>Climate</td>
<td>21</td>
<td>23.6</td>
</tr>
<tr>
<td>Fear of the unknown</td>
<td>19</td>
<td>21.3</td>
</tr>
<tr>
<td>Prefer to go elsewhere</td>
<td>17</td>
<td>19.1</td>
</tr>
<tr>
<td>Crowded/overpopulated</td>
<td>17</td>
<td>19.1</td>
</tr>
<tr>
<td>Nothing to 'see or do'</td>
<td>12</td>
<td>13.5</td>
</tr>
<tr>
<td>Expensive</td>
<td>9</td>
<td>10.1</td>
</tr>
<tr>
<td>Not safe</td>
<td>9</td>
<td>10.1</td>
</tr>
<tr>
<td>Poor accommodations</td>
<td>8</td>
<td>9.0</td>
</tr>
<tr>
<td>Language barriers</td>
<td>7</td>
<td>7.9</td>
</tr>
</tbody>
</table>


which tourism marketers can focus on those potential consumers most likely to be interested, and perhaps equally important, direct available marketing efforts to those activities most likely to influence the target audiences.

India seems to have pursued the policy of undifferentiated marketing despite the varying interests of North American tourists. It is difficult to determine their target audience except that it is in broad geographical areas of North America. This undifferentiated marketing campaign suggests that India's tourism marketing strategists do not fully understand the activities, interests, and opinions (A.I.O.s) of its existing and potential North American tourists. In other words, India seems to be pursuing a policy of selling rather than of marketing. Marketing demands that India should match its tourism products with the lifestyles of its clientele whereas a selling approach could warrant offering whatever India already has without considering specific (A.I.O.s) preferences of the different segments of its North American target market.

Few effective marketers attempt to market their products or services to a single segment of the market but rather aggregate a number of segments whose needs and wants are likely to be met (McCarthy and Perreault, 1990, pp. 62-86). The affluent Asian Indian community in North America is about one million strong, and could form a viable segment worth exploration. It is likely that this large group tends to be well educated and of sufficient income to afford traveling back home. Moreover, it is customary for ethnic Asian Indians to return home regularly to visit. A thorough, well-developed marketing plan to attract the children of non-resident Indians (NRIs) to discover their roots by visiting India more often would be highly likely to be successful.

It would appear that the Indian Government has not yet recognized the NRIs as the affluent tourist group they seem to be. About 55% of Air India's clientele on its New
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York–New Delhi route consists of Indian–Americans (India Abroad, 1989). But India has never developed a separate marketing strategy to target this segment of the North American market. Additional research into this highly viable group would be very appropriate and should inquire into how the needs and wants of NRIs differ from other segments. Exploration of the ways and means by which appeals to NRIs will be most effective should be a high priority research objective.

The economically vibrant Indian community of about one million people in North America and India's tourism marketing strategists both could help in establishing a socio-marketing system of strategic communication. More than 16,070 Indian students attend almost every important university in the United States alone (India Abroad, 1988 [b]), where they have formed their culturally oriented Indian Student Associations. Similarly, Americanized and Canadized Indians have set up their city level associations throughout North America. Professionals of Indian origin too have established their own bodies. All of these socio-cultural associations and bodies could have a definite and positive influence on the way India is perceived in North America. Documentaries, books, and other promotional material could be produced by the government of India and then distributed to clubs, associations, educational institutions, and other bodies across the country. Doing so would provide information that is well-balanced and portrays a more accurate image of India.

India's tourism product strategy, based on sound tourism marketing research in North America, should offer those outstanding and unique tourism products, which match the psychographic and demographic profiles of potential tourists. For instance, by simply advertising its Gulmarg Ski Resort located in the State of Jammu and Kashmir, India cannot motivate North Americans to go to India and ski because tourists do not travel thousands of miles to engage in activities they can accomplish closer to home (Ogilvy, 1965). Of course Gulmarg may be a secondary attraction to visiting tourists, but it cannot constitute the prime destination product motivating them to undertake a skiing tour to India. After scrutinizing all of its tourism resources, India should select those which have a marketing, not selling, potential in North America to their most promising target markets.

Almost every marketing study conducted by the Government of India to understand the dynamics of North America's market seems to be demographic-orientated. However, two people sharing common demographic profiles may differ psychographically. Hence, demographic research should be supplemented by psychographic studies of tourist markets to understand the activities, interests and opinions of both actual and potential tourists (Wells, 1975). Without investigating the tourism-related lifestyles of its clients, India will not be able to develop an effective tourism marketing strategy. These lifestyle studies would significantly help India in its strategic attempts of product positioning and market segmentation.

Strategically locating tourists offices

Determining where and how products and services will be made available to potential consumers is a major concern for marketers (Evans and Berman, 1984, pp. 223–253). One widely used medium in tourism promotion is that of tourist offices. Tourist offices commonly become sales promotion tools designed to stimulate tourism. Without having first developed an image consonant with what actually exists in the destination country and the image that is stimulated in the potential tourist’s mind, little effective marketing can
take place. Likewise, without the second stage of selecting a differentiated market to which to address the marketing appeals, success is also unlikely. The tourist offices usually need specialized themes to promote attention, increase desire and stimulate action.

India maintains four tourist offices in North America—in New York City, Chicago, Los Angeles, and Toronto. Research studies have concluded that the number of tourists who visited India after the establishment of the tourist offices was much lower the number of tourists estimated by trend projections (Anand, 1976). It could be argued that India failed to reach their projected goals because of uncontrollable environmental factors. However, when the accelerated growth rates of the rest of the world and especially of the East Asian tourist destinations are noted (Tuttle, 1987), it would appear that the effort expended by India’s tourist offices had negligible impact on the flow of tourists from North America. However, no available research has been found to suggest the investigation has been conducted by the Indian Department of Tourism into the marketing effectiveness of these tourist offices. Important questions relating to which offices perform more effectively, what roles they play, how they cooperate with other tourism agencies, and the degree to which they promote through local business and social organizations need to be investigated.

Continuous shift of the U.S. populations from snow-belt to sun-belt suggests that three more tourist offices should be opened in Texas, Florida, and Washington, D.C. to cover the growing areas. The proposed office in Washington, D.C. would also cover the enclave consisting of Maryland and Virginia.

Developing promotional themes
Tailoring advertising to specific market segments has long been a standard practice in marketing, and promotional themes have become an essential component of successful international tourism marketing in recent years (Harris and Katz, 1986). The competitive nature of the industry demands that new, creative, and well-planned promotional themes be employed on a regular basis.

As a part of India’s program to increase awareness of their country to potential tourists, and to build a positive image of their country, a Festival of India was organized during the summer of 1985 in the United States. Exhibitions, dance concerts, seminars, store promotions, public television documentaries, Indian films, etc. were the major highlights of the Festival’s promotion attempts. By presenting India to the North American audience as a packaged product, visa applications to visit India went up by 35% in the latter half of 1985 at the Indian Consulate in Chicago. This increase testifies to the Festival’s positive impact on image building. Furthermore, Maupintours, a tour operating company that specializes in offering 25 inclusive tours to India annually, added five tours in response to the increased enthusiasm about India.

It is highly likely that the Festival of India theme promotion would have been even more successful if greater attention had been given earlier to the topics of India’s image, most likely target markets, strategic marketing plans and more effective employment of India’s tourist offices.

Correcting attitudinal problems
The marketing concept (McCarthy and Perreault, 1990, pp. 27–30) requires that everyone in an organization be aware of the need to satisfy consumers expeditiously and courteously. Ensuring that the marketing concept is employed by all persons delivering goods or services
is a specific responsibility of the marketing function. If necessary, training and development should take place to ensure that the marketing concept is applied consistently throughout the entire organization.

Attitudes and social behavior are often the result of cultural indoctrination learned early in life and are highly resistant to change. Differences in social behavior are usually expected by international tourists but not to the point where such differences become irritating. Very few tourism personnel receive cross-cultural instruction in how to interact with nationals of other countries (Krohn and Ahmed, 1991 [a]).

Any country seriously desiring to effectively compete in the international tourism market will be required to insure that persons most likely to come into contact with tourists are skilled in cross-cultural communication.

Most of the people working in Indian tourism establishments (airlines, hotels, motels, airports, travel agencies, tour operating companies, railroads, cabs, etc.) have a condescending attitude toward tourists. They appear as if they are doing a favor to the tourist and also expect a reward for the services for which a payment has already been made. This condescending attitude, besides causing psychological discomfort to the tourists, portrays a negative image of India's hospitality. Though India wants to be regarded as a ‘Land of Welcome & Hospitality’, the attitude of most of India's travel and tourism employees does not ensure a satisfying experience to a visiting tourist (New York Times, 1990).

**Improving product strategy**

The product, as identified by Evans and Berman (1984, pp. 285–366), is a major component of marketing concern. The product is not only the physical item or service purchased but includes a wide variety of other variables including the manner in which it is offered, its cleanliness, packaging, and guarantee or warranty. Unfortunately, the tourism industry is one of the worst offenders in not delivering the product advertised while nevertheless conforming to the letter of the description (Krohn and Ahmed, 1991 [b]).

Ease of obtaining the product in tourism is often misrepresented and while tourists may endure an unenjoyable trip, it is certain that they will not repeat their visit and inform others of the misadventure upon their return home (New York Times, 1990). Tourism providers need to consider the entire experience of the tourists, not just the basics and incorporate those considerations into their packages.

India's tourism product strategy is not compatible with the claims made through its tourism promotion strategy. Problems encountered by tourists as a result of poor touristic facilities often spoil the touring experience of vacationing tourists. If India wants to capitalize upon the flow of tourists from North America, it should consider introducing new flights from Chicago, Los Angeles, Miami, Toronto, and Vancouver to India. Air charters should also be considered. The failure of the domestic carrier, Indian Airlines, to confirm bookings because of aircraft shortages has been a major factor responsible in causing embarrassment to touring people (New York Times, 1990). Without opening the domestic market to private airline(s), this problem is unlikely to be solved.

**Promoting India as a convention destination**

Sales has long been identified as a major element in marketing; in the minds of some, it is the only element. Despite the attention given to other important elements in marketing, sales remain a major factor in effective marketing (Wotruba, 1980).
One of the reasons that tourist packages are so popular is because scales of economy can be attained and lower costs passed on to the clientele. Convention tourism is similar in that one sale results in hundreds or even thousands of tourists coming to a single destination. Furthermore, such tourists are commonly more affluent and spend more than others. Greater solicitation of convention business could spur India’s tourism business.

A large share of tourism revenue for many countries derives from conventions because the delegates tend to stay longer, spend more and may repeat their visits. Most convention delegates mix business with pleasure tourism. Once conventioneers return home, they are likely to tell others of their experiences, thereby stimulating word-of-mouth publicity (International Association of Convention and Visitor Bureaus, 1990).

India’s successes in attracting and hosting the annual convention of the American Society of Travel Agents (ASTA), attended by 1,200 delegates in spring 1989, demonstrates that India possesses the potential to market itself as a world class convention destination. India has successfully hosted about 100 international conventions in the first half of 1989 (Know India: Newsletter of Indian Tourism, 1989).

In view of ASTA’s successful 1989 convention, India should formulate marketing plans to target the convention market more aggressively.

Conclusion

This paper has examined the challenges and opportunities confronting India in marketing itself as a successful tourist destination in North America. Seven interrelated prerequisites were suggested as a means of overcoming their problems: (1) the Indian Government was urged to develop a strategic marketing program to correct India’s negative image; (2) targeted marketing based on psychographic segmentation principles was recommended as a necessity to focus upon the wants and needs of North American tourists in all their diversified natures; (3) it was suggested that marketing research should be conducted to determine the effectiveness of India’s tourist offices and they should be made focal points of a strategic communication system; (4) promotional themes should be developed on a regular basis; (5) attitudinal changes were cited as needing attention to reduce cross-cultural misunderstanding between tourism personnel and tourists; (6) differentiated marketing strategies were proposed to replace currently pursued undifferentiated marketing programs; and finally (7) it was recommended that India should be promoted as a convention destination.

If the Indian Government wishes to increase its share of world tourism and especially that of the North American market, it would be well advised to consider the seven points analysed and discussed in this paper.

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