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**The Growing Indian Middle Class:
Attracting Indian Tourists to Japan**

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Title: The Growing Indian Middle Class: Attracting Indian Tourists to Japan

Abstract

Two policy decisions motivated this paper. One, a Japanese Government policy to increase the number of visitors to Japan by 30 million; and the other, growing India- Japan relations where emphasizes on 'People to People Exchange' is increasingly gaining significance. While conducting preliminary investigation on this subject, it was realized that India's growing middle class which is the main driver for consumption was being focused on by Japan as a single group and not being considered as segmented entities. Further, the approaches of Japanese tourist agencies towards attracting Indian tourists were similar to that of western tourists. Thus this paper first discusses the changes in decision making pattern in Indian middle class families and why the relevant target group is top 3% of the pyramid. The study then ventures, through an online questionnaire, into understanding what motivates foreign destination tourism among this 3% of Indian consumers. Compilation of data showed certain contradictions to popular beliefs. To gain clarity, the research used relevant cases from among the respondent group.

The findings of this research suggests that for Japan to be the choice of destination for Indian tourists, it is critical to recognize that the needs of Indian tourists differ substantially from that of the western world, and projecting that Japan is ready to meet those needs is essential.

Keywords: Indian middle class segmentation, Indian consumer's decision making, Indian consumer's tourism desires, attracting Indian tourist to Japan

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The Growing Indian Middle Class: Attracting Indian Tourists to Japan

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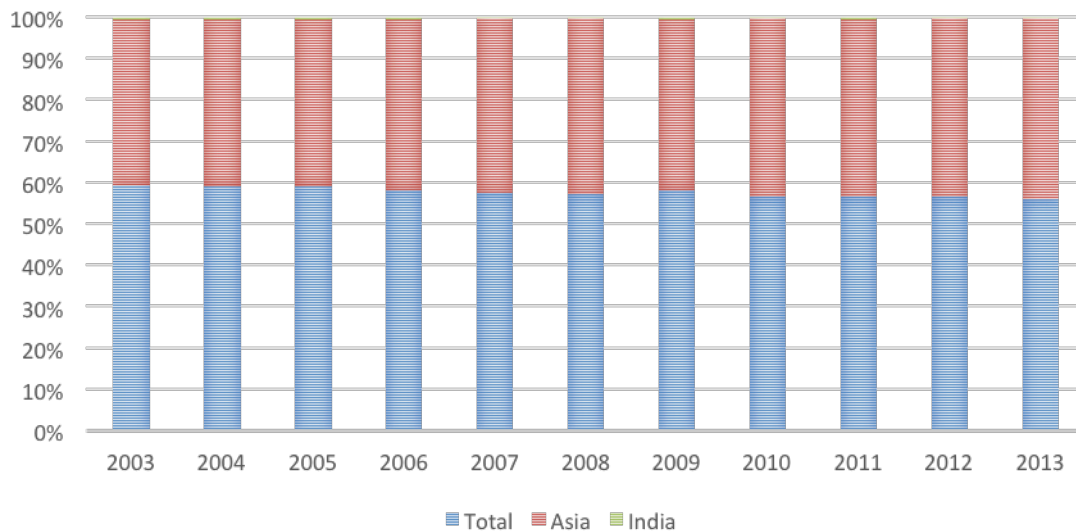
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Introduction

Japan has been trying to get out of its prolonged recession through various means. While monetary, fiscal and structural changes have been the agenda, Prime Minister Koizumi in January 2003 first gave a push to the tourism sector by claiming that Japan would be looking at increasing its foreign visitors to 10 million. A policy direction was given to this by starting the 'Visit Japan Campaign' in April 2003. Land mark policy directions were the December 2006 Enactment of Tourism Nation Promotion Basic law, June 2007 cabinet decision on a Tourism Nation Promotion Basic Plan, establishment of Japan Tourism Agency in October 2008. Establishment of this agency gave impetus towards creating an environment which encouraged tourism. In June 2009, in the Basic Economic and Fiscal policy discussion, the Cabinet mentioned "Realization of the Age of 20 million Foreign Tourists Visiting Japanⁱ". This was furthered by Hatoyama's Cabinet in October 2009 when the number was increased to 30 million foreign tourists. As a policy, relaxations of visa was granted for Chinese people and under Kan Government 'Program for 30 million Foreign Tourists' and 'decentralized vacation' were chosen as national strategic projects.

Under the Tourism Promotion Policy initiative, seven strategic areas were identified. They were- Environment and Energy, Health, Asian Economy Tourism and Revitalization, Science, Technology and IT Employment, Fostering Human Development and Finance. The key was to increase the number of foreign visitors to Japan to 25 million per year by 2020 and then to 30 million. The underlying reason was that tourism is a service sector that generates business and employment for various strata of the society and creation of new destinations and that newer types of man-made tourism would lead to development of little known hinterlands establishing business and employment opportunities in dispersed localities. Though the March 2011 earthquake was a setback to in-bound tourism, the government along with the Tourism Agency came up with many initiatives in various countries to help eradicate the fear and create a positive atmosphere to attract tourists. That policy direction was carried over by the current government.

Fig 1: YEARWISE INBOUND BREAK-UP OF TOURIST TOTAL/ASIA/INDIA

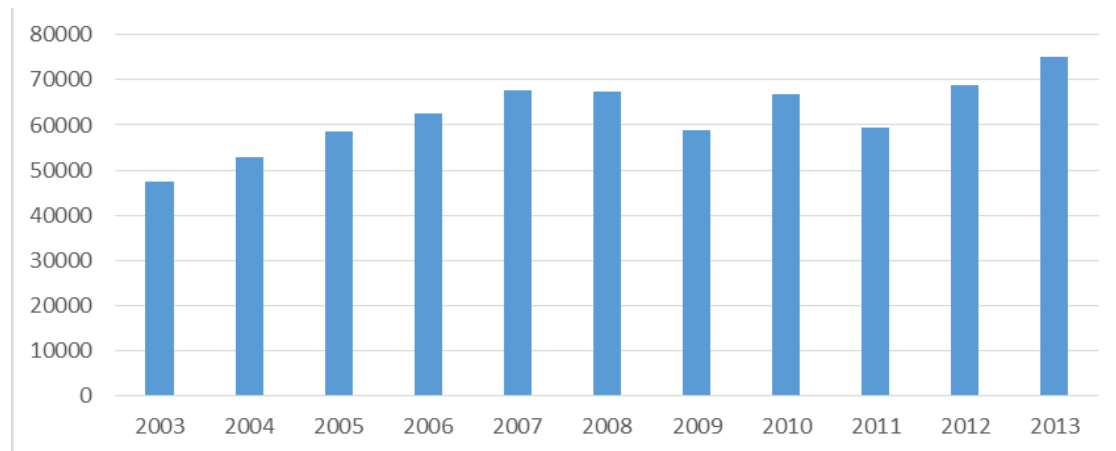


Source: Japan National Tourism Agency

Asia has been predominant in sending its tourists to Japan as for many countries in the region, especially for China and Republic of Korea; Japan is the closest foreign destination with a strong cultural affinity. The White paper on Tourism published in 2012 claims, “A Japanese government initiative to more than double foreign tourism to 25 million visitors a year by 2020 is considered vital to the country's economic health because of the shrinking Japanese population and downsizing of heavy industry.” A record 13.41 million foreign tourists visited Japan in 2014, a 30 percent jump from the previous year, and the number may top 15 million in 2015. With Tokyo set to host the 2020 Olympics, Japan is all set to build infrastructure and develop human resources to make it pleasant for the tourist and thus encourage repeat visits.

While Japan has its policy in place and it has been steadily proving beneficial towards inbound tourism, the Indian tourist to Japan is yet to show any significant preference to visit that country. Magnifying the data for the Indian tourist visiting Japan one can see that in 2013 there were just over 70,000 visitors.

Fig: 2 Indian Tourists in Japan



Source: Japan National Tourism Agency

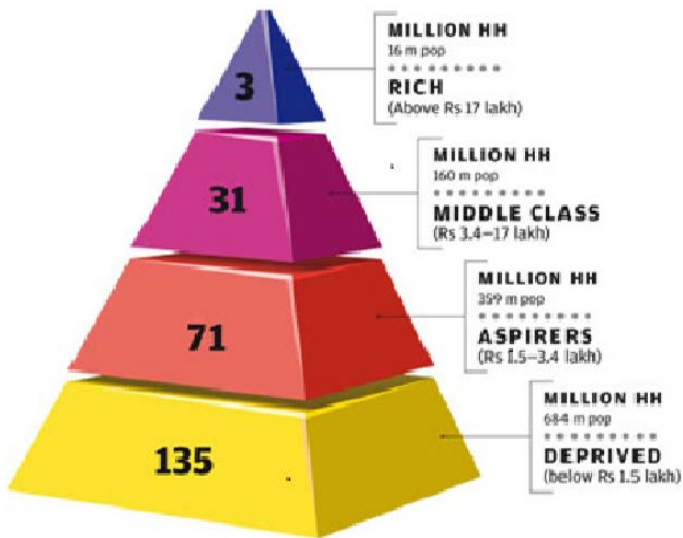
In spite of growing India Japan relations and Joint Statements made by the Prime Ministers of Japan and India in their annual meetings emphasizing on people to people exchange in which tourism is considered the foremost conduit, the ground reality of Indian tourists visiting Japan is miniscule even while considering Trip Advisor's statement in 2014 that there has been a 21percent rise in Indians travelling abroad and the Amadeus Report of 2014 which says "Indian travelers to North East Asia, South Asia, South East Asia and the Pacific are increasing at 10percent annually or more."

However Japan has not been able to leverage this growing interest of Indian consumers to vacation in foreign destinations. Thus the objective of this study was to first understand Indian consumers and realize the importance of targeting the right set of consumers, identify the interest of Indian tourists with regard to choice of destination and activities and then to understand the perception that the people of India have about Japan. All this was done through a questionnaire based survey and case study method.

To gain an understanding of the target consumers, a background of the current profile of Indian consumers becomes essential. A brief description of the new dynamics that has emerged in the Indian consumer market because of changing societal norms and IT enabled technology warrants some attention.

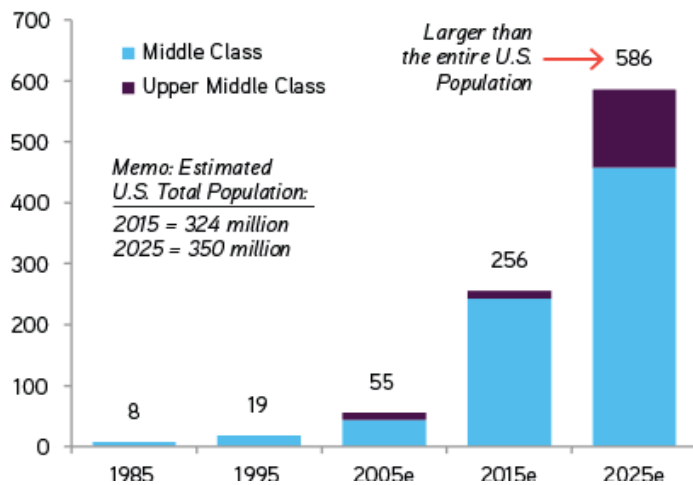
India's ascendance as an economic power has among other things unraveled a huge consumer market. Even with slowdown of growth, consumerism is upbeat among the growing middle class. McKinsey, National Council for Applied Research (NCAER) India and many others have segmented the Indian society according to the varied levels of consumerism.

Fig 3: Indian Middle Class Income Pyramid



Source: NCAER CMR stratification 2010

Fig 3A: India Middle Class Population (millions)



Source India: Unlocking the Demographic Dividend p9

The implication of a growing middle class can be gleaned from the above figure which shows that by 2025, the middle and upper class alone will be larger than the entire population of the United States of America.

Five influential segments that are becoming powerful decision makers are the educated women in urban areas, professional women who are also homemakers, youth of India, children above the age of 8 and rural India. While the first three influence tourism, the rural sector does not have significant population who come into the middle and upper class. Further, the aspiration of the rich rural group in India is yet to make any significant impact towards foreign tourism.

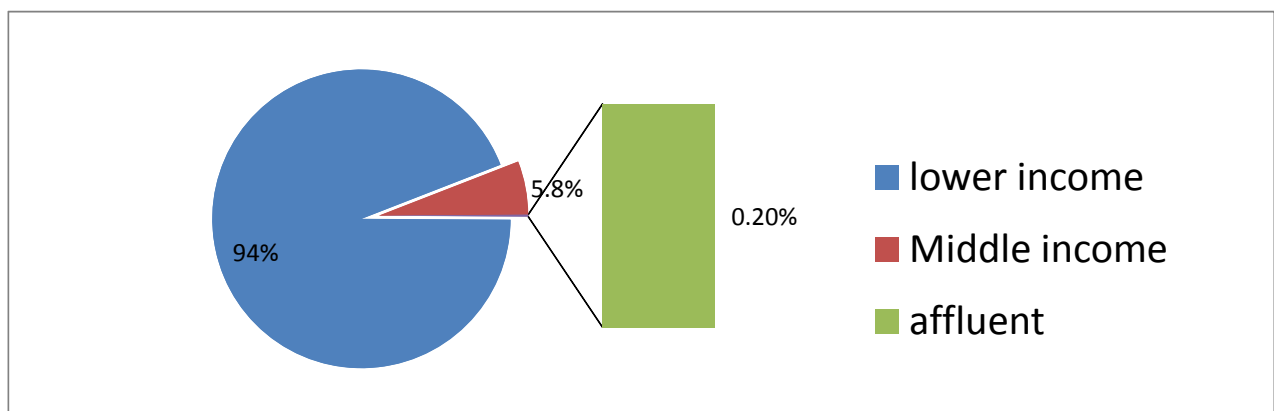
The middle class women have come of age as they are educated, often working professionals and have broken away from the traditional sacrificing image, but does not want to go all the way. She wants to conform to the values she believes in and yet wants to do her own thing. She has also given her career a priority and thus is self indulgent. If she is a housewife, she has moved from being a 'homemaker' to a 'home manager', and is respected for her decisions by her spouse.

The Youth of India are the darlings for retailers, however being young and having a long list of goods that they aspire for they are not keen to spend on expensive vacations. At best they look at the relatively cheap South East Asia for a foreign visit.

The children of 8 years and above are often part of a nuclear family and have indulgent parents. They are also tech savvy and thus have started commanding a role in decision making. Since Indian families usually are family centric children come to play a decisive role in planning vacations and choice of destination.

So how can we interpret this with respect to tourism? According to McKinsey (fig 4) it is the .02percent of the affluent middle class who are the target group for the tourism sector which translates approximately 2,000,000 million people. In the NCAER pyramid it is the upper 3percent. Although in percentage terms it is small, the volume of this population segment is large and can mean a significant number for in-bound tourism for Japan.

Fig: 4 CONSUMER PROFILES 2010



Business Opportunities for Japan: Attracting Indian Tourists

Methodology:

Considering the complexities of Indian consumers and the fact that international tourism is restricted to a small segment of the Indian population, the study set out by targeting households with income of at least Rs. 300,000 which corresponds to 3percent NCAER. Further, given that on an average, an educated Indian joins the work force around the age of 23 and marries around the age of 30 and by the time household income also reaches the above mentioned income level the individual is 35. Thus an age cap of 35 years was used.

The questionnaire format was used to conduct a survey. Since it was essentially a perception study, ranking was the method used. Two sets of questionnaires were compiled: Questionnaire A profiled the Indian respondent and Questionnaire B looked at attraction of Japan to the Indian tourist. The objective of Questionnaire A was to profile the respondents with respect to attitude towards vacationing in foreign destinations, the decision making process, destination criteria, the choice of travel, activities during vacationing and financial considerations. Questionnaire B was to garner information from respondents who have travelled abroad about how they perceive Japan and reasons for not visiting Japan in spite of being well travelled. The Questionnaires borrowed extensively from Travel Tourism Competitiveness Index with respect to the general parameters. Questionnaire for international tourists used by Tourist Attraction Development Division, Tourism Promotion Department of Tourism and Cultural Affairs Bureau, City of Sapporo, was used as a reference point to map how to attract the Indian tourist to Japan.

The survey was conducted online by posting it on Face book. The researcher also pursued some individuals who have a network among the targeted income group to post the questionnaire on their social networking pages. The questionnaires were consecutively posted for a month. 322 people responded to Questionnaire A, of which the valid number of responses from among those who met requirement criteria was 132. However, incomplete and double counting resulted in the number of valid respondents being further reduced to 102.

Upon compilation of data from the questionnaire, it was realized that some general assumptions of why Indian tourists did not visit Japan were invalidated. Thus the researcher realized that it was important to draw a sample from the respondents and hold intensive interviews to enable an in-depth understanding of the issue at hand. Thus, eight case studies were used to substantiate, authenticate and comprehend the obscurity behind reluctance of Indian tourists visiting Japan. The cases were chosen from the categories defined below with substitution of income and divergence of interest of travel. They were not only interviewed in detail about their decision making as well as other considerations; but those respondents who

were travelling abroad were queried in detail about their imaging of Japan, the knowledge and understanding of the country, their perception of the culture and people and the reason for not visiting that country. A mix of income and the profiles was matched to identify the cases as listed below:

- Both professionals with a monthly household income of above Rs 500,000; two children; well travelled for both business and pleasure, stayed in China for three years but have not travelled to Japan (50percent of the 3percent of the Indian middle class)
- The male in business with huge inheritance and with income level of Rs.2, 000,000 monthly. Family consists of two children and a wife. Travels abroad more than once a year for pleasure. (Top 5percent of the 3percent of the Indian middle class).
- Both professionals, no kids, monthly household income above Rs.5,000,000. Well travelled for business and pleasure. Same destination twice over but never Japan. (Top 10percent of the 3percent of Indian middle class)
- Among top 1000 businessmen of India. Did not disclose income. Family of four. Well travelled both for business and pleasure. Travelled to Japan for business reasons but never for tourism(Top.02percent of the 3percent of the Indian middle class)
- Both husband and wife in business with a monthly household income of Rs. 400,000. One kid. Well travelled to Europe, USA and South East Asia but never to Japan. (Top 50percent of the 3percent of the Indian middle class)
- Male in business with household income of Rs.10,000,000 monthly. Two kids. Travelled to Europe Australia and South East Asia but never to Japan. (50percent of the 3percent of the Indian middle class)
- Both professionals, no children. Monthly household income of Rs.3000,000. Mainly travel for business but takes holiday in exotic destinations once in two years.(70percent of the 3percent of the middle class)
- Both professionals with monthly household income of Rs.500,000. Never travelled abroad but has intention to travel at least once in next two years. (50percent of the 3percent of the Indian middle class)

Profiling the Respondents

Compilation of the data resulted in categorizing the respondents into three groups. The age gender and regional break up can be gleaned from the data representation below. As for age, 80percent of the respondents were from the age group of 35-45 and 46-55, who are essentially represent the image of new-India. Post 55 years comprise of 20percent, though they are a significant target group for tourism as they have more time for leisure, having 'taken care of' or having completed their family commitments. Low catchment of this group could be due to poor use of social networking. In gender profiling, there are lesser men respondents and in regional representation, south has few respondents as compared to other three regions.

However, the subject of query “attracting Indian tourist to Japan” is not compromised by this age, gender and region profiling as is evident from the findings of this survey.

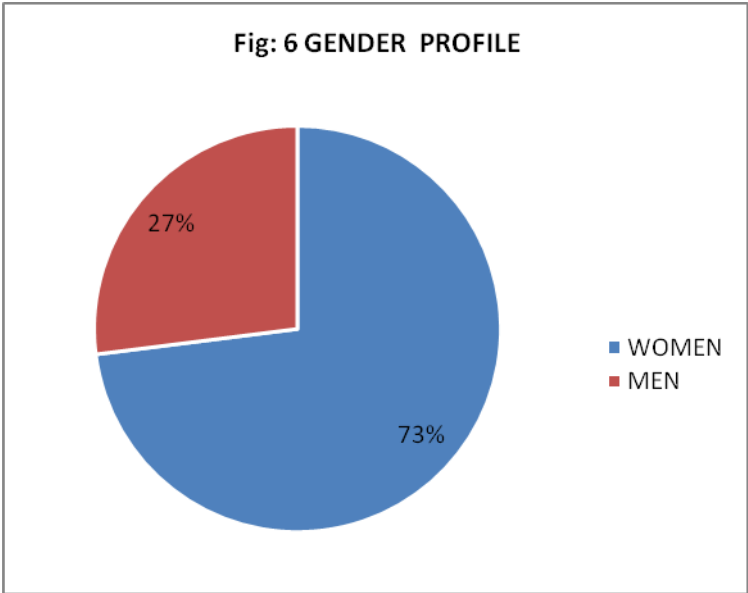
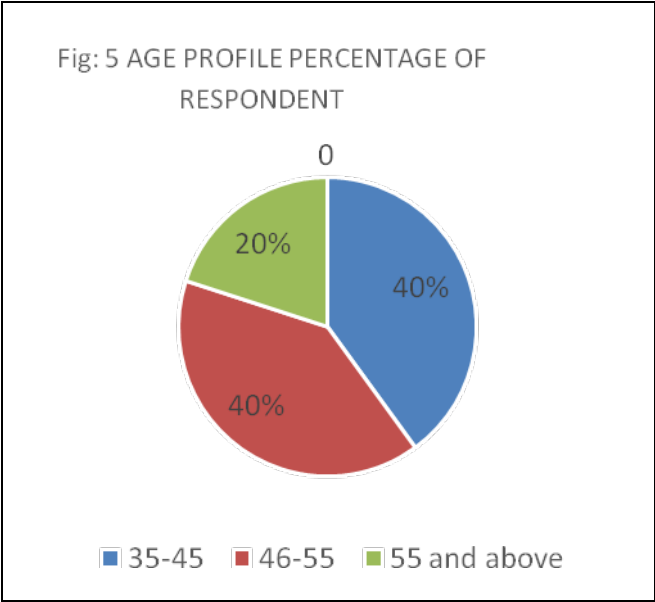


Fig: 7 REGIONAL BREAK UP

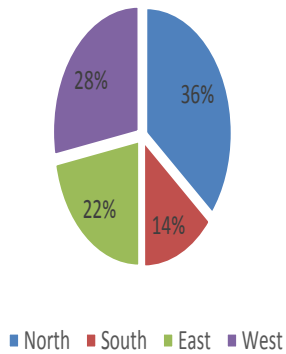
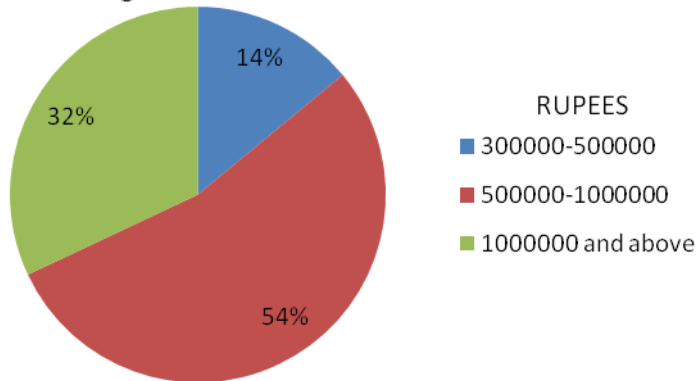


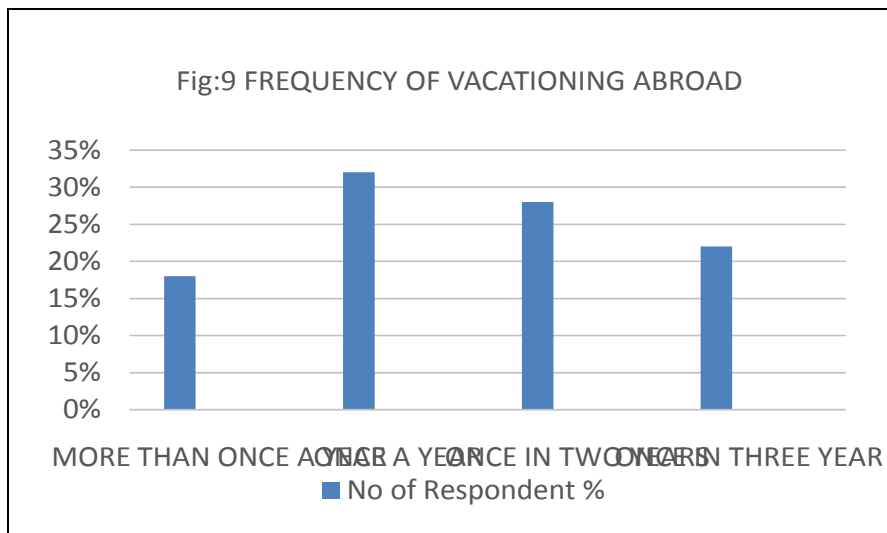
Fig:8 INCOME DISTRIBUTION



It is well conceived that income, more importantly disposable income, is a critical consideration for tourism and more so for foreign destinations. The survey thus set the level of monthly income of the household to 300,000 rupees and above. The distribution is well represented with 54percent of the respondents falling in the income bracket of Rs. 500, 000 to Rs.1, 000,000 which is a good representation of the population.

Categories

- **25.7%** of the respondents were both working professionals with a median age of 42. Significantly they were well travelled with high disposable income with 2percent of them either single or without any kids. Double income no kids (DINKS) as they are referred to is an emerging phenomenon. Travel was both for pleasure and work.
- **71.9%** of the respondents matched the typical image of upper middle class Indian consumer, where the husband ran a business in form of small / medium/ large enterprise and the wife was homemaker. This group has a very high level of disposable income, and has the leisure and will to spend a sizable amount of money on themselves. Strongly influenced by international brands and peer pressure, they have grown to look at foreign destinations as way of show casing their status in their society.
- **2.4%** of the respondents were both professionals like the other group. However, the departure was that they had not visited foreign countries; but 86percent of this group claimed that they aspire to visit a foreign destination in the next two years.



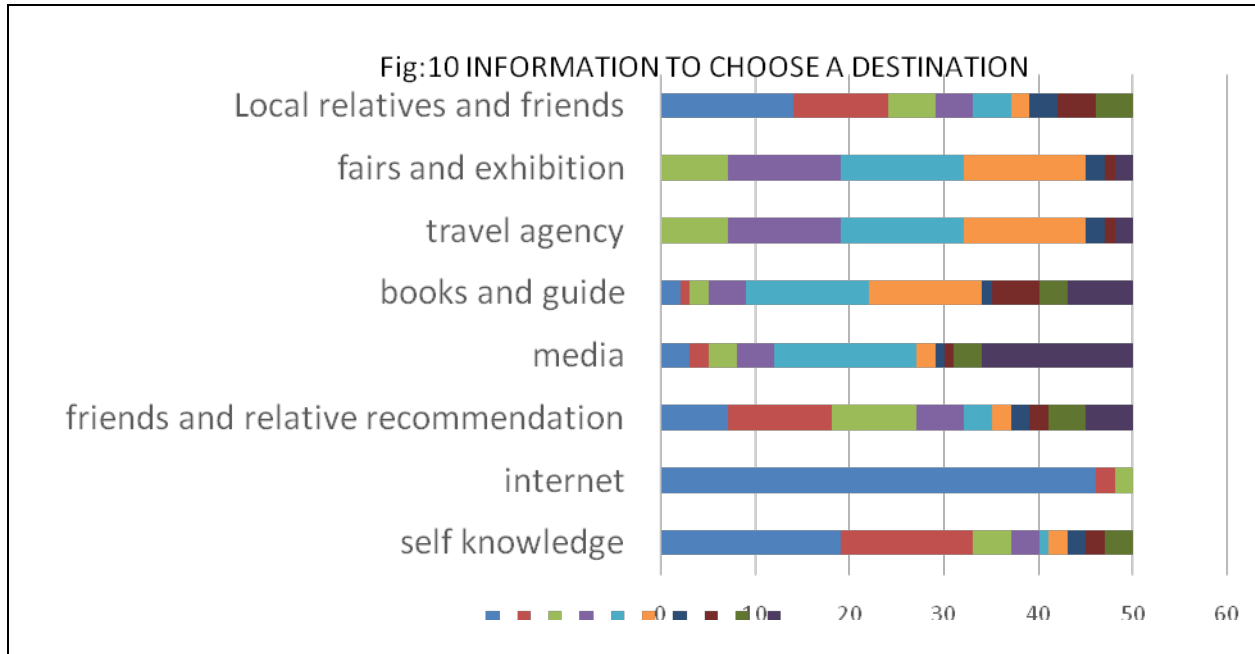
Among the respondents 18percent took vacations more than once a year; 32percent once a year, 27percent once in two years and 22percent once in three years. Thus the target group in the questionnaire fulfilled the necessary requirement and also the sufficient criteria of having a will to travel abroad.

Decision Making

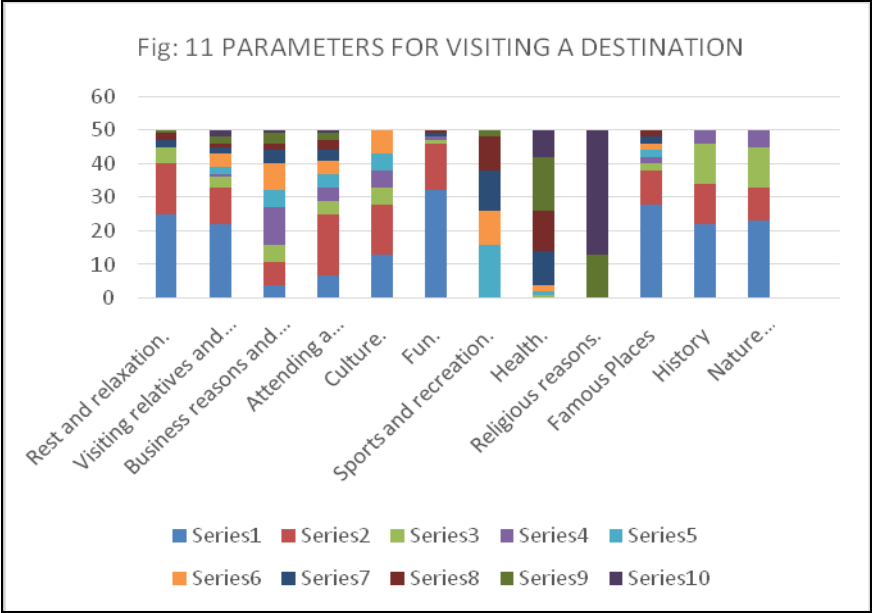
Tourism, especially to a foreign destination is of prime intent in all households across the income group. The most important deviation that was seen with respect to foreign destinations was that while domestic travel included friends and relatives, travel abroad was essentially with spouse and children among 90percent of the respondents. Among the spouses, it was the male

participants who broadly decided the financial commitment, and beyond that the destination was chosen by women and children.

The eight case studies pointed to the fact that deciding on a destination saw active participation of children, and the children and the women went through rigorous research to zero in on a destination.

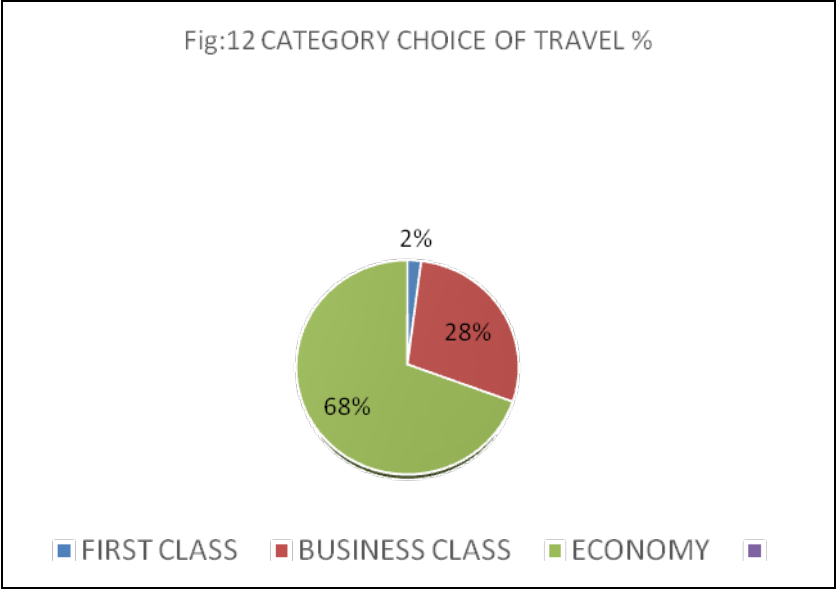


Internet search along with popular “must see” sites was found to be source of information. 86percent of respondent ranked the Internet as the most important information gathering site. The role of the Internet is gaining momentum because the children too are becoming active participants to the decision making process, and being savvy with Internet, they are able to source relevant information not only with respect to sightseeing but also accommodation and travel itinerary. While it is believed that word of mouth plays a major role in India, this survey showed it was a poor 7percent. Self knowledge however played a significant part of decision making. Travel programmes came in at 5percent and travel guide literature at 2percent. The case studies thus focused on the issue of “self knowledge”. By self knowledge respondents claimed that often a business trip to a particular destination becomes motivation for tourism, especially for a vacation with family and thus figured high as an option.



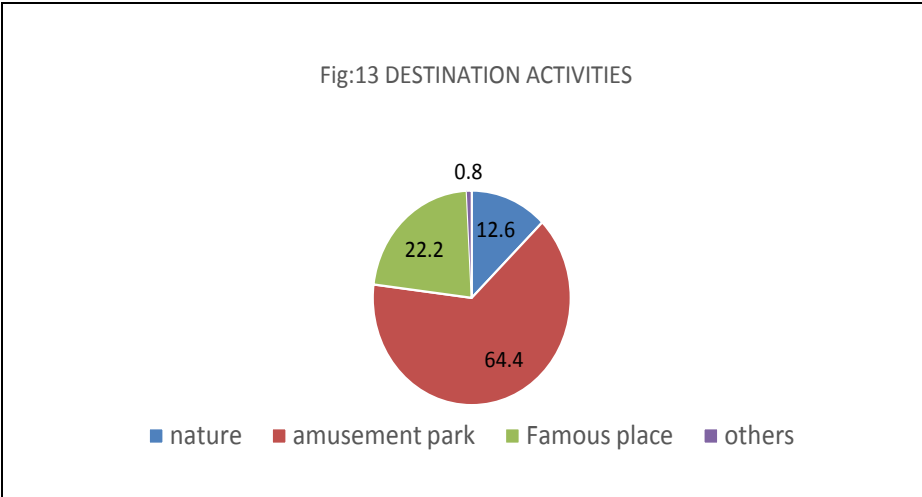
The parameters for choosing a destination were taken from travel and tourism competitiveness index and two parameters were added: namely, visiting relatives and friends and famous places. The reason for this is that Indians, unlike the western travelers, include visiting friends and relatives along with tourism, as culturally Indians like to keep up familial ties and it is cost effective to combine the two. The respondents were told to rank the 12 parameters. The significant departure from western tourism was that rest and relaxation was not the prime reason for travel; rather, it was 'fun'. 'Famous places' followed by choosing destinations where relatives were stationed were given strong consideration. Religious destinations were also not high on the list.

Choice of Travel



The choice of travel would seem irrelevant as every respondent travelled by air as very few cruises have India as port of call. But this question helped the researcher in validating the corresponding income level and also made it easy to target the case studies.

Activities during Tourism



The activities that the respondents indulged in were significantly different from western travelers and needs greater scrutiny. Clarity on the previous section on parameters under consideration while choosing a destination is achieved when the information is juxtaposed along with the above data. High on the list was ‘amusement park’ as not only children but at least one of the spouses was enthusiastic about this form of entertainment. The “fun” as a parameter for choice of destination- (Fig(14) was

intriguing and figured as a major reason in the case studies. While interviewing the selected cases, this aspect was discussed in detail and the understanding that emerged was that the element of fun included amusement parks, some adventurous sports which were not high risk and seeing some street shows like circus. Yet another deviation from the western tourist was that night life carried little weight for foreign travel consideration. Cases categorically emphasized that since they travelled as a family, leaving the children behind and going out did not merit consideration while deciding an itinerary. Although culture and history figured high on the choice of destination, the cases confirmed that it was not a prime mover: rather, nature in form of cool weather, sea beaches or mountains with easy to medium trekking trail was desired. The cases typically qualified that a destination with mix of a city/ metro and some nature was always the consideration. Thus, according to the cases, on a one-week vacation, it would ideally be two days in a city where sightseeing would include historical monuments, exhibitions, shopping etc., two days of amusement park and children’s activity, two days of being with nature; either moving to the hills or sea shore which the cases claimed as rest and relaxation, and one day for shopping.

Financial Considerations

The foremost consideration for the respondents in choosing a foreign destination has been stay and daily allowance. The 2percent travelling by first class were typically staying in starred properties and their budget extended way above the other two categories. The other two groups stayed in budget hotels. The business class travel respondents mostly marked budget hotels with only an insignificant number marking starred properties. The cases picked from the business travel respondents said that travel by business class was predominantly supported by mileage points gathered due to business travel during the year.

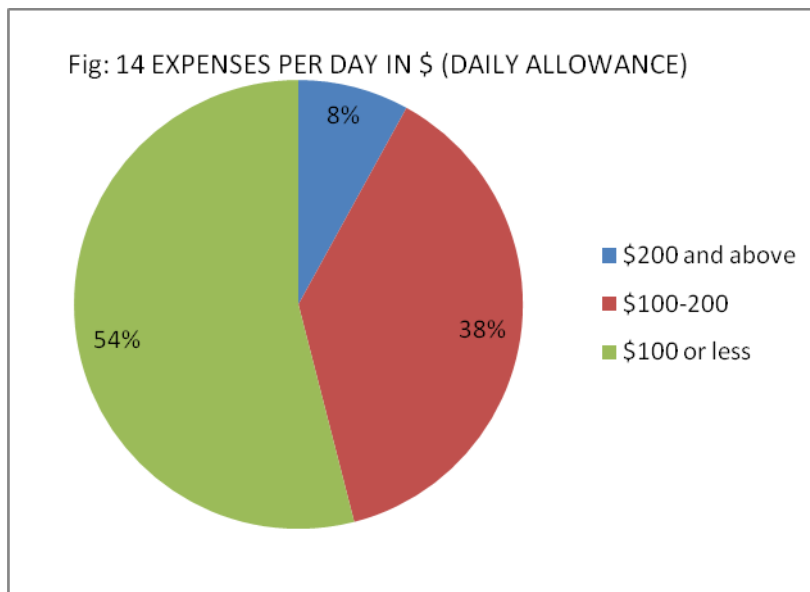
Table: 1 A COMAPRISION OF HOTEL STAY FOR FOUR PEOPLE

City	Budget Hotel Cost #		Lunch/Dinner Cost*	
	Local Currency	USD	Local Currency	USD
London	88-103 GBP	150-175	60/120 GBP	100/200
Zurich	156-178 Swiss Franc	175-200	70/105 Swiss Franc	80/120
Paris	73-91 Euro	100-125	40/80 Euro	55/110

New York	USD	175-200	USD	60/100
San Francisco	USD	175-200	USD	60/100
Tokyo	7606-10141 JPY	75-100	8000/10000 JPY	80/100
Kyoto	7600-10141 JPY	75-100	6000/8000 JPY	60/80

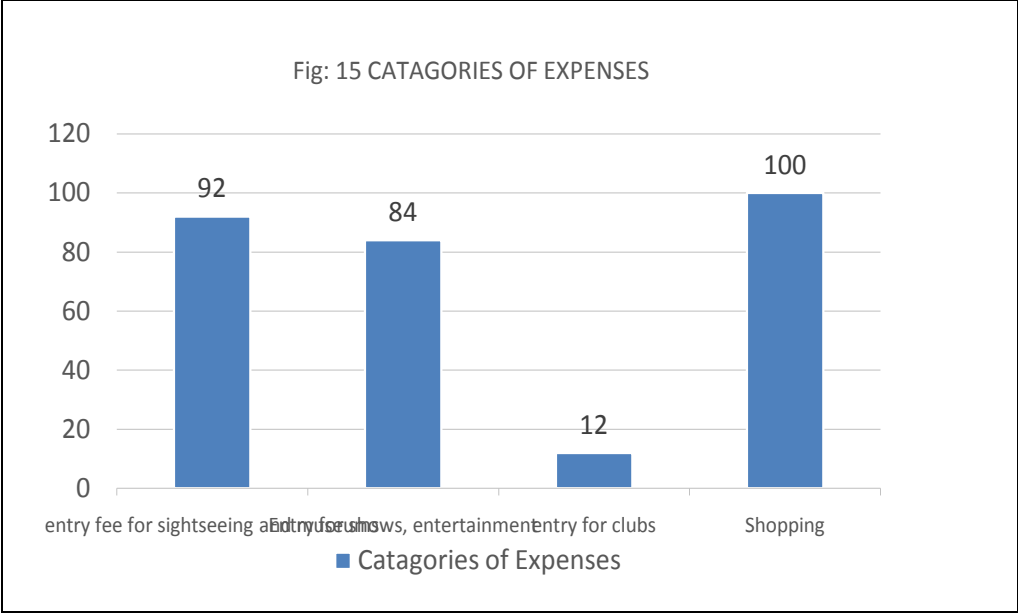
Compiled from sites of Travel agencies

Since accuracy of budget break up was found wanting in the questionnaire format a survey of the budget hotel rates was culled out from travel agency sites and it showed that among the destinations visited by Indians like London and Zurich the rates were costlier than that of Tokyo and Kyoto, two important hubs for tourist travel.



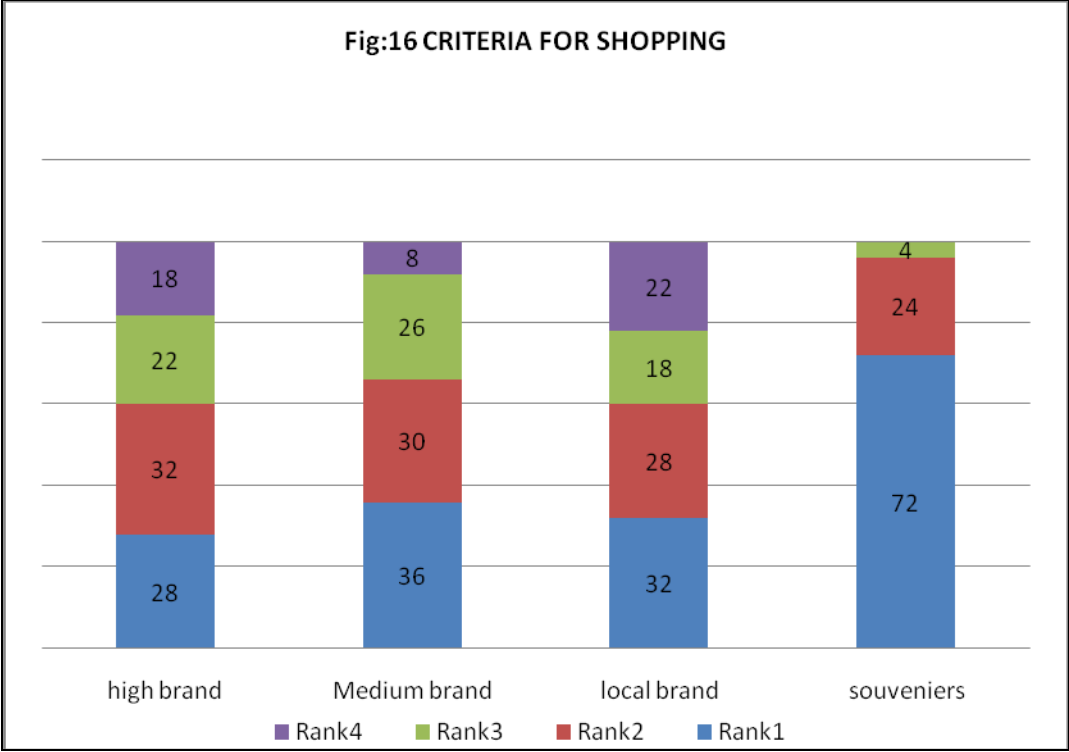
As for daily expenses, one can notice the frugality of Indian tourist. Ideally, targeted expense was \$100 or less for 54percent of the respondents. The cases argued that it also depended on the place of visit as in Europe there are expensive locations like Austria as well as cheap destinations like Greece. However, the case respondents agreed that going above \$150 did cause angst.

If one was to distribute the daily allowance in various categories one can notice that



Shopping entry fee for sightseeing constitute substantial expense on a foreign trip. Clubs, pubs and night life which is a huge draw for the western tourist has little interest among the Indian respondents.

Shopping is high on the agenda for Indian tourists and is well documented. The data harnessed also gave similar output.

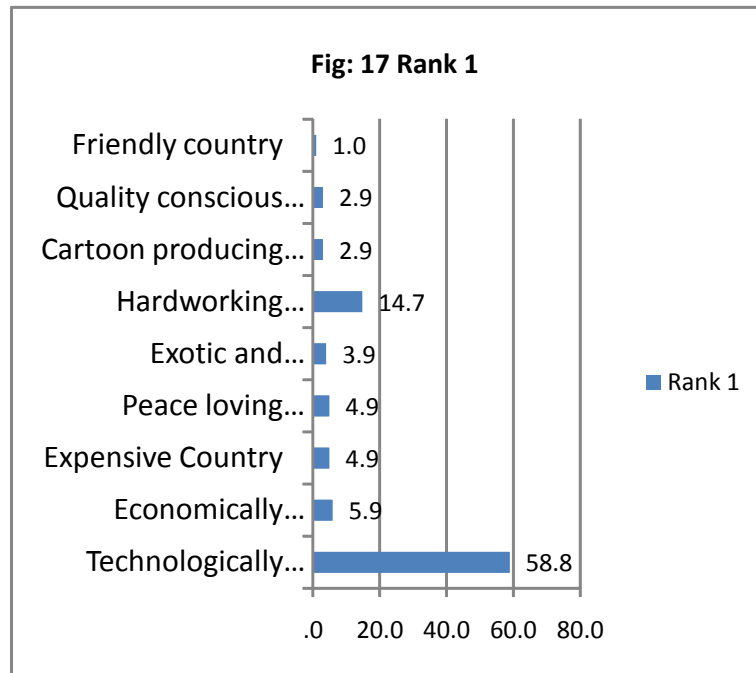


Buying souvenirs predominated shopping with a whopping 72 respondents ranking it at 1. Not much can be assumed in studying the buying pattern among high, medium and low brands. There was

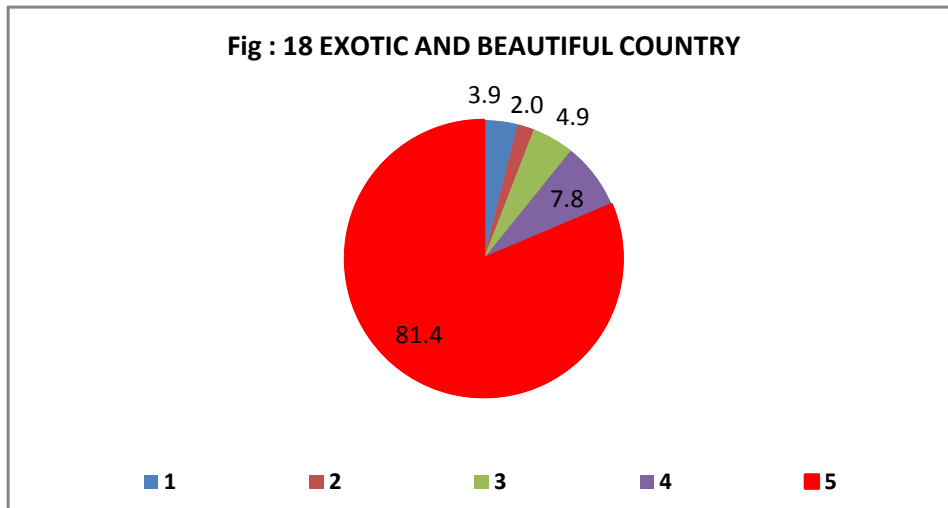
unanimous agreement that women were anxious to shop and often researched on the Internet about what to shop and where to shop. They also gathered self knowledge through word of mouth. In some locations the name and the location of the shop is so well known that it is almost a ritual to visit it. . The cases also pointed out that they have little knowledge of Japanese brands and did not perceive Japan as a destination for shopping.

Having profiled and gathered information about vacationing abroad from respondents, it was important to gather their perception of Japan in terms of imaging, awareness, knowledge of cities. Questionnaire B sought information on these aspects which highlights the area of concern while targeting Indian tourists to Japan.

Perception about Japan



The respondents were asked to rank certain qualities that are commonly attributed to Japan. The list of qualities ranged from ‘friendly country’, ‘expensive country’, ‘technologically strong’, ‘economically advanced’, to ‘hard working people’. The fig (18) ranks each quality. Almost sixty respondents have rated Japan as a technological advanced nation, ranking that indicator as 1 . The second image is that of Japan as a nation of hard working people. Most respondents were unaware of Japan’s exotic locales or even of its culture, thus proving that Japan did not hold much attraction in how it is perceived by the average Indian tourist.



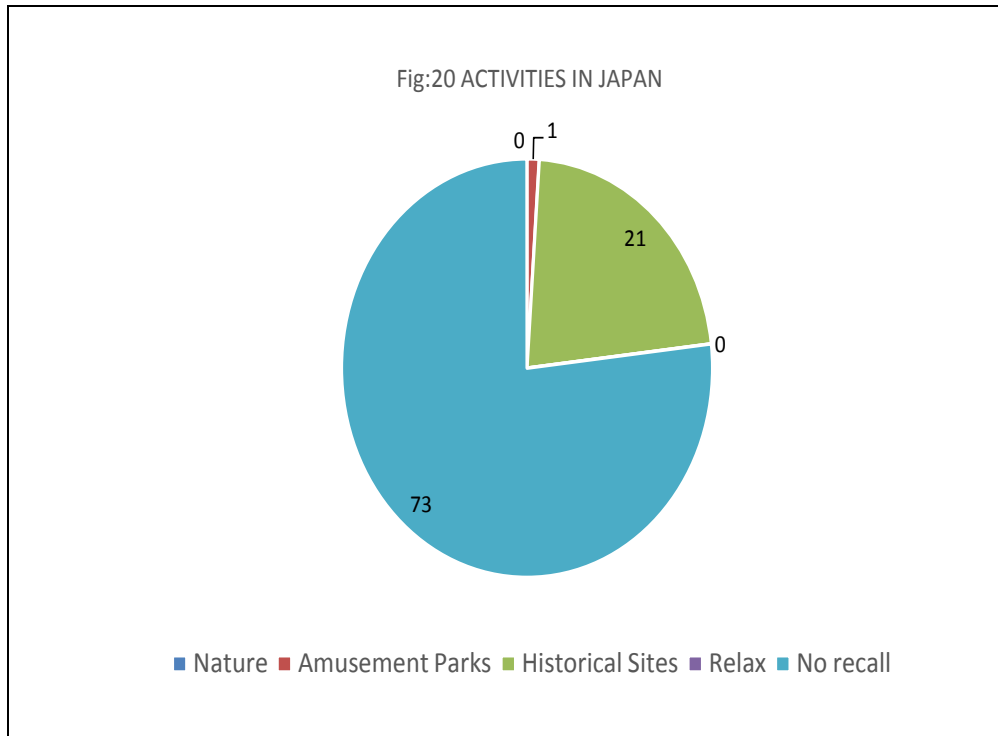
To the western world Japan is an image of the mystical and exotic, of samurais and geishas: However, this image has little appeal among the Indian respondent. Only 3.9percent gave this image rank one and 81.4percent gave it rank 5. Thus, foretelling that promoting Japan on the criterion of ‘exotic’, will have little or no recall by the Indians. Thus to sell ‘Japan’ to Indian tourists, the tourism department of Japan and various agencies need to understand Indian’s indulgence criteria during vacationing at foreign destinations and thus reposition itself.

Fig: 19 KNOWLEDGE OF PLACES IN JAPAN



The respondents were then given names of seven cities and asked to recall them. While Tokyo had 100 percent recall, Hiroshima and Nagasaki had 98.8percent recalls mainly because of the history attached to them. Even Kobe with significant Indian Diasporas had less than 50percent recall, and Kyoto which is the cultural capital had recall level of slightly over 50percent. This further show cased the relatively low

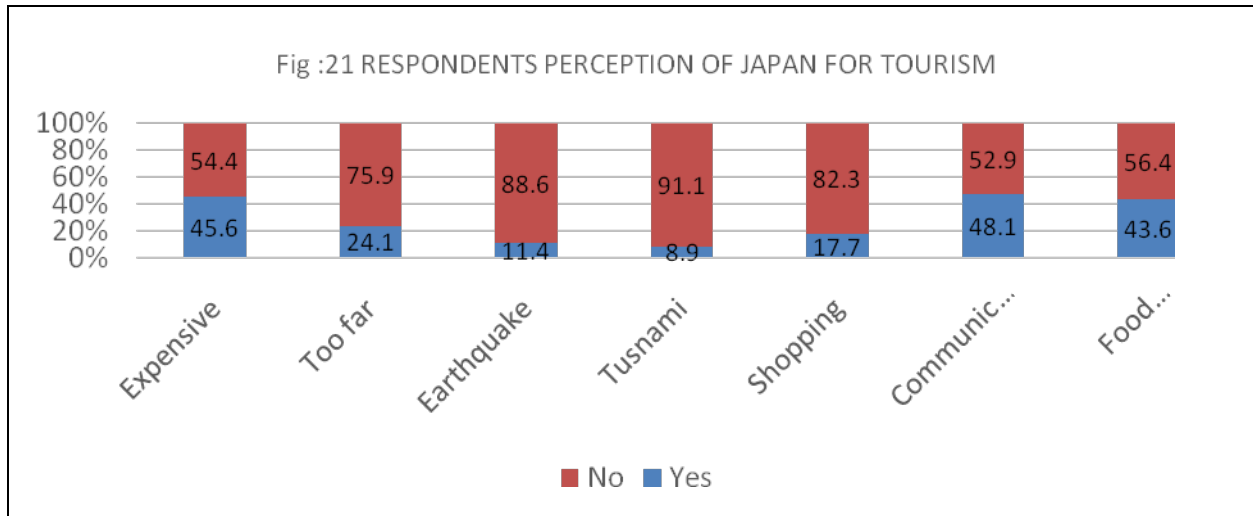
level of knowledge or awareness of Japan among Indian tourists. In questionnaire A, the researcher had asked about activities that the respondents would indulge in when on vacation. Taking the first five ranked activities the respondents were asked whether they would indulge in those activities in Japan.



To the Indian tourists the two most common reasons for choosing a destination is nature and fun in the form of amusement park. With respect to Japan, very few respondents had neither recall of any particular natural heritage nor name of any amusement park. In fact

Thus the case studies became a good source of understanding the apathy towards Japan with respect to image and activities associated with tourism. Among the eight case studies, three of them had visited Japan on business. While each of them had seen a little of Tokyo during their visit, they had found little time to visit any sites in and around Tokyo. While they liked Japan as a clean, polite and disciplined country, they had no urge to bring their family for a vacation. When the respondent of a case who had stayed in China was asked why not Japan, the reply was there was no list of any must see places in Japan and thus felt little interest to visit.

However what was intriguing was that the travel agencies in India had uniformly ascribed the reasons for not travelling to Japan as expensive, difficult because of language, cuisine and the recent tsunami and earthquake which has resulted in lesser interest in Japan.



In an attempt to garner whether the potential tourist's views matched with the views of the travel agencies, the study asked the respondents to state their reasons for not visiting Japan with a 'YES' or 'NO'. Shopping was added as an indicator to a list of reasons stated by the travel agencies. Interestingly, unlike the myth on which travel agencies rest their views of Indian tourists least interest on Japan, the data as represented in the above bar diagram indicates even criteria of 'expensive' and 'food/ cuisine' had less than fifty percent of the respondent stating them as the reason.

Conclusion

According to the national census data of 2010, India's population stands at 1,027,015,247. However as is well known, the country has a large number of poor people and thus cannot qualify as an advanced nation and for out-bound tourism. The 'middle-class' as termed by the NCAER stands at mere 0.20percent of the population. This middle class has been further segmented into three categories according to household incomes. As pointed out early the essential target group is the 3 million households of approximately 16 million people. This middle class would be growing to 26percent of the population who would then be termed as affluent class by 2020. Thus this group needs to be identified and targeted to ensure flow of tourist to Japan.

An interesting fact emerged from the respondents of Questionnaire A in which they were asked to list the countries visited in order of first time vacation abroad to the latest one. The map that emerged showed that first round of trip abroad is limited to South Asia, South East Asia and Dubai. Second round is mainly to Europe, the third round is to the United States of America. Respondents were asked for their reasons for choice of destination. The reasoning was South Asia and South East Asia are closer destinations, with similar culture and relatively cheap. Europe has a lot of historical ties with India and thus a recall leading to a destination choice. Respondents chose USA because of the brand recall of the country. Australia, New Zealand, Mauritius and China come in as exotic locales and are destinations to

be explored once Europe has been visited. Japan should thus position itself as a vacation beyond the first two rounds.

To claim its position as a destination for Indian tourists Japan requires to build its image as a tourist destination by offering tourist activities that Indians indulge in. Japan can showcase itself as an inexpensive tourist destination, promoting travel and including familiar cuisine to the Indian traveler. Use of social media and cinema would also help elevate Japan's recall in Indian minds.

Japan has huge potential as a tourist destination for travelers from India. A multi pronged approach in image building, targeting and focusing on indulgence of Indian vacationers would help attract Indian tourists and augur well for Japanese economy.

ⁱ White paper Japan Tourism Agency 2009

ⁱⁱ Fig5-21Compiled from Questionnaire survey questionnaire A and questionnaire B

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