

Culture, Values and  
Japanese Tourism Behaviour

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## **Abstract**

While the role of culture as an influence on consumer behaviour and product/service choice has long been acknowledged, the current literature in marketing offers an incomplete understanding of how and why culture plays its influential role (Overby, Woodruff and Gardial 2005). Research suggests that values provide the link between culture and consumer behaviour and values have been the focus of much research in the social sciences. In particular, values have received significant attention in cross-cultural research, being used to characterise the similarities within and differences across cultures. Values are central to the marketing discipline as they determine value, i.e. what activities, interests, and material goods consumers identify with, enjoy, acquire, or consume (Grunert and Muller 1996). Both directly and indirectly, values drive consumption behaviour.

Typically, values have been assessed and compared through the use of standard measures such as Rokeach's Value Survey, the List of Values and Schwartz's Value Survey. Recent literature highlights growing concern over the application of standard measures across cultures and issues of cross-cultural invariance. There is a need for new research into cross-cultural applications of consumer value measures and theoretical models. This thesis critiques the use of Western conceptual paradigms and imposed etics in value research, and, using a Japanese tourism context, seeks a deeper understanding of how culture and values affect tourism consumption and experience.

This thesis offers an empirical test of the cross-cultural applicability of a commonly used values scale in consumer research, the List of Values (Kahle 1983). The findings of this phase of the research extend the literature concerning methodological issues in values research and highlight the limitations of the LOV as a cross-cultural measure of values. Based on these findings the thesis adopts an alternative, qualitative methodology to investigate the relationship between Japanese culture, values and tourism behaviour in New Zealand. The findings of the second phase of the research contribute to a recent call in the literature for more qualitative research in tourism, and allow the identification and understanding of the key values relevant to Japanese tourism behaviour. The results of Means-End interviews with Japanese visitors reveal the important cultural assumptions informing values and shaping tourism decisions and behaviours for two key groups of Japanese tourists.

The theoretical framework presented in this thesis promotes our understanding of the relationship between cultural beliefs, values, and consumer behaviour. The results of the primary research highlight the importance of cultural and physical history, world-view, self-concept, thought patterns and language in the formation and interpretation of values. The thesis presents a holistic attempt at understanding Japanese culture, values and travel behaviour by examining how these concepts cohere in a logical framework. The thesis argues that, given the inherently cultural nature of values, their interpretation within the context of cultural beliefs is highly important in understanding variability in consumer behaviour across cultures.

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## **Chapter One - Introduction**

### **1.1 Background to the Research**

Values have long been considered a core element of culture and used to conceptualise its influence on behaviour (Kroeber and Kluckhohn 1952, Rokeach 1973). The literature clearly provides support and empirical evidence linking values and consumption, and acknowledges cross-cultural differences in these values. Values have been shown to be efficient, measurable sets of variables that are less numerous, more centrally held and more closely related to motivations than demographic and psychographic measures (Madrigal and Kahle 1994).

The study of values has a long history in the social sciences and their application in consumer research has shown significant relationships with consumer choice behaviour. The most popular approach to values research in marketing has been the approach typified by Rokeach (1973). Values are typically assessed through the use of value surveys such as Rokeach's Value Survey (RVS), Schwartz's Value Survey (SVS), the Values and Lifestyle Survey (VALS) and the List Of Values (LOV).

While the link between culture, values and behaviour is well established and values research in marketing has been extensive, its results have not always been conclusive (Chan and Rossiter 1997). Values survey research is the preferred method of investigating values in cross-cultural consumer behaviour research; however, there are significant methodological issues that threaten the cross-cultural validity of this approach.

Despite the importance of culture to marketing practices, and particularly the marketing of tourism products and services, Reisinger (2005) has noted that there is a lack of literature looking at the influence of culture on tourism behaviour. Converging technologies and disappearing income differences across countries have not, as expected, lead to homogenisation of consumer behaviours (De Mooij and Hofstede 2002, Holden 2004); and a knowledge and understanding of cultural values remains essential to successful international marketing efforts (Sun, Horn and Merritt 2004). One such industry in New Zealand, where knowledge of cultural values is vital, is tourism. One of New Zealand's key tourism markets, consistently in the top four countries in terms of visitor numbers is Japan. Despite the huge importance of the Japanese market to New Zealand tourism, our knowledge of the values and

motives that drive their tourism choices and behaviour is limited (Chon, Inagaki and Ohashi 2000, Reisinger 2002). This thesis seeks to identify and understand the values relevant to Japanese tourism behaviour and better conceptualise the relationship between Japanese culture and the tourist behaviour of Japanese visitors to New Zealand.

### **1.1.1 Research Context**

The total number of Japanese visitors to New Zealand for 2004 was 179, 530, making it one of our largest markets (along with the UK, USA and Australia). In 2004 there was an increase of 19% in visitors from Japan, and the market shows positive signs of further growth. Total Japanese visitor expenditure is the fourth largest overall, and in the year to December 2004 contributed NZ\$649 million to the NZ economy in visitor spend. Japanese are among the highest spenders whilst in NZ, spending on average NZ\$3,934 per person in 2004 (NZTB 2005). NZTB recognises three major travel segments for the Japanese market; FIT (23%), Semi-independent (29%), and Package Tourist (36%) (NZTB 2006). This research focuses on identifying the values for the two groups with the most divergent values (i.e the FIT and the package tour markets), in an effort to gain the maximum variation in information and understanding.

Japan currently remains New Zealand's largest source of Asian visitors, however, while Japan's outbound travel is increasing, New Zealand's share of these arrivals has been in decline over the past three years (NZTB 2006). This is despite New Zealand rising from ninth to seventh place worldwide as the most desired destination for Japanese travellers (JTB 2005). Clearly in order to tailor our tourism offering and our promotion of that offering, an understanding of the values influencing Japanese tourism is vital to New Zealand's success as a destination. As the literature suggests, an understanding of values is essential to international marketing efforts and thus it is vital for NZ to understand the values influencing tourism motivation and behaviour to ensure we continue to appeal to and attract the Japanese tourist.

The large extant literature on Japanese tourism discusses and quantifies the key characteristics of Japanese travel behaviour, however the research is mainly descriptive and does not examine the link between cultural values and travel behaviour (Chon et al. 2000). An understanding of the link between Japanese culture and values, and how this relates to tourist behaviour, has not been well conceptualised. In a list of specific areas suggested for further

research, Chon et al. (2000:182) identified “the systematic theoretical link between Japanese travel behaviour and Japanese cultural values”. It is intended this research will contribute to the understanding of this link.

### **1.1.2 Justification for the Research**

Although You, O’Leary, Morrison and Hong (2000) noted the scarcity of cross-cultural research, particularly in the context of international tourist behaviour and marketing, this area remains under-researched. The most recent special issue of the *Journal of Vacation Marketing* (2005) calls again for greater awareness of the need for more research on leisure travel in a cross-cultural context. Reisinger (2005:195) states: “The way in which national culture influences travel behaviour and tourist decision making is more important than ever... (however)... it appears that there is little knowledge among academics and marketers of the influence of national culture on travel choices”.

There is an acknowledgement in the literature of the necessity for a standard cross-cultural values measure, and it has been suggested that researchers should rely on instruments of known validity and reliability, such as the RVS or LOV, in an effort to develop some cumulative knowledge of values and consumer behaviour (Becker 1998, Kahle 2000). Kahle (2000) has suggested the LOV is a viable candidate to be a widely accepted instrument for the cross-national and cross-cultural comparison of values and it has been widely applied in this context. Kahle (2000:7) states: “Differences in values have been identified but little is known about the meaning and specific expression of these values across cultures... To the extent that international and cross cultural research can focus on one instrument, multiple studies will become comparable and provide converging information about values”

The application of Western conceptual models in other cultures and the issue of cross-cultural equivalence in the application of measures across cultures is a growing area of concern in marketing research and studies have highlighted several problems in this regard (Malhotra and McCort 2001, Vandenberg and Lance 2000). However, the issue is still rarely examined in much of the marketing literature (Schaffer and Riordan 2003, Smith and Reynolds 2002, Steenkamp and Baumgartner 1998, van Herk, Poortinga and Verhallen 2005). There has also been a growing body of literature calling for qualitative approaches as an alternative to survey research (Shrum McCarty and Loeffler 1990, Steenkamp 2002, Thompson and Troester 2002).

Specifically a Means-End approach to link values to product attributes and benefits has been called for (Steenkamp 2002).

## **1.2 Research Question**

The research question for this thesis is: **What are the values relevant to Japanese tourism behaviour, and how do these values impact on tourism behaviour and decision choices for Japanese tourists to New Zealand?**

Objectives:

The specific objectives of this thesis are:

1. To discuss the limitations of conventional approaches to the study of values and to examine the cross-cultural validity of the LOV scale in Japan
2. To establish and apply an alternative methodology to value surveys to investigate the link between values and tourism behaviour
3. To provide academic researchers with a framework for conceptualising the relationship between culture, values and consumer behaviour
4. To enhance our understanding of the benefits sought and behaviour of Japanese tourists to NZ with respect to Japanese culture and values

## **1.3 Contribution**

This research contributes to identifying and understanding the values impacting on Japanese tourism behaviour and provides insight into the link between Japanese culture, values and tourism behaviour. Using a two stage approach this thesis firstly contributes to the literature concerning methodological issues in values research, offering a test of Kahle's LOV in a large sample of Japanese nationals and highlighting its limitations as a cross-cultural measure of values. Secondly, the thesis proposes and applies an alternative methodological approach to values research in a cross-cultural context. The research findings from this phase offer a fresh look at the modern Japanese tourist. Finally, the thesis proposes a model to conceptualise the link between deeply held cultural beliefs, values and tourism behaviour choices, and highlights the importance of understanding values in religious, cultural and philosophical context.

#### **1.4 Research Methodology**

Values research has typically been approached from a positivist paradigm and this thesis reviews and critiques current theory and measurement of values from within this paradigm, i.e. by the empirical standards relevant to that paradigm. It then goes on to offer an interpretivist account of values and an alternative methodological approach to the study of values and consumer behaviour.

The first stage of the research focusses on addressing the issue of the cross-cultural validity of the LOV measure. Empirical data for a test of the LOV was collected by means of a self-administered mail survey. The final questionnaire, divided into three sections, asked respondents their level of agreement on a 1-7 Likert scale on a variety of statements about NZ. All respondents were asked to complete the background section containing demographics such as age, income, gender, education and psychographic information including Kahle's List of Values.

A focus group was also conducted to clarify the meaning of the nine value items in Japanese. A group of four native Japanese language instructors were asked the meanings and nuance they associated with each of the values as they were translated into Japanese.

The second stage of the research focusses on identifying and operationalising an alternative methodology to the survey approach to values in order to identify the culturally important values to Japanese tourists and conceptualise the link between these values and tourism behaviour choices. An interpretive, qualitative Means-End approach to the research question was deemed most appropriate in light of the severe limitations found with the survey approach to values in the first phase of the research. Laddering interviews were conducted with fourteen Japanese tourists in a key NZ tourism destination. The interviews guided discussion around four key areas of tourism behaviour: destination, activity, accommodation and transportation choices. Respondents were asked their initial reason for choices in these categories and, using the laddering technique, moved back to uncover the values underlying their choices.

#### **1.5 Outline of the Thesis Structure**

The first section of this thesis reviews the relevant literature in three chapters:

Chapter Two sets the context for the research by offering a review of the history of travel in Japan, identifying several cultural concepts important to modern Japanese travel. This chapter also reviews the findings of past studies of Japanese travel behaviour and outlines the importance and current situation facing the NZ tourism industry with regards to the Japanese market.

Chapter Three provides an overview of culture, reviews the conceptual models underpinning research in the area and examines the link between culture and values. A summary of the key literature regarding Japanese culture, and an examination of the relationship between culture and consumer behaviour is offered in Part One of this chapter. In Part Two the literature related to values and their measurement is discussed and, more specifically, the literature pertaining to values and travel behaviour, with particular reference to the LOV scale.

Chapter Four offers a critical review of methodological approaches to values research, highlighting the inherent problems in values survey research in a cross-cultural context. This chapter concludes with an application of the LOV in Japan and given the limitations found, discusses the merits of a qualitative approach to values research.

Chapter Five provides an overview of the literature review findings and outlines the research objectives.

The remainder of the thesis outlines the primary research subsequently undertaken: Chapter Six outlines the research methodology employed and Chapters Seven and Eight discuss the results and implications of the research for academic theory in both Japanese Studies and Marketing, as well as some practical implications for tourism in NZ. The thesis concludes with a summary of the research and suggestions for further research.



## Chapter Two – Japan and Travel

### Part One - History of Travel in Japan

#### 2.1 Introduction

Travel has long been an important aspect of Japanese culture, from early pilgrimage, to wide domestic travel and more recently the so-called overseas 'travel boom'. This chapter will set the context for the thesis by providing an in-depth analysis of Japanese tourism from the past to the present, and highlighting the importance of the Japanese tourist market to New Zealand. Part One will discuss the history of travel in Japan and the important links to pilgrimage needed to contextualise modern Japanese travel behaviour. Part Two will provide a critical review of the literature on modern Japanese travel.

This section will trace common themes, travel styles and reasons for travel from the Tokugawa period (1600 – 1868) through to the twentieth century. Pilgrimage and tourism are inseparably intertwined in Japan and therefore an understanding of pilgrimage and its development, is necessary for an understanding of modern Japanese travel. According to various sources, pilgrimage was from an early time an excuse for pleasure travel and the similarities between the organization and travel styles of early pilgrims and modern tourists are many. The concepts of *meibutsu* (famous things), *senbetsu-miyage* (souvenirs) and *kinen* (memorabilia) remain as relevant to modern Japanese tourism as to the discussion of pilgrimage where they first arose. However, other considerations, specifically economic and political ones, have also played a major part in the formation of the modern Japanese travel industry and these too will be examined.

#### 2.2 Pilgrimage and Tourism in Japan - Some Important Definitions

Cohen (1974:542) defines a tourist as "a voluntary, temporary traveller, travelling in the expectation of pleasure from the novelty and change experienced on a relatively long and non-recurrent round trip". The *Oxford English Dictionary* defines a tourist as "one who travels for pleasure or culture, visiting a number of places for their objects of interest, scenery, or the like". It is a break from the ordinary routine of life and according to Graburn (1983a: 11) travel "falls into that set of non-ordinary behaviours which also includes play, ritual, ceremony, communion, altered states of consciousness, meditation, worship, pilgrimage, and

so on". The *Oxford English Dictionary* defines a pilgrim as "one who journeys to some sacred place as an act of religious devotion".

The link between pilgrimage and tourism is a debated one (see Graburn 1983a for a summary). Although it is beyond the scope of this thesis to debate this link in a general context, in the case of Japan, its religious background, long isolation, and distinctive travel development, mean the link between the two is undeniable. The unique aspects of modern Japanese travel require a detailed look at pilgrimage to be fully appreciated and understood.

In Japan, the dividing line between pilgrimage and tourism is obscure – from the earliest period of Japanese history the pilgrimages of courtiers were also pleasure trips, as we know from their diaries (see Donald Keene's anthology *Travellers of One Hundred Ages*). While the journeys of common people did have sacred places as their destination, they also fulfilled all aspects of the above definitions of travel; an important part of the trip was the pleasure derived from the 'novelty and change'. The important difference between the definitions is the issue of purpose, a pilgrimage being 'an act of religious devotion' rather than purely for novelty and change. For two major reasons the purpose for Japanese travellers is unclear. Firstly, the nature of Japanese religion means the concepts of pilgrimage and more secular forms of travel differ from Western definitions. The native Japanese religions are more concerned with rites of passage, nature and beauty, and the lines between the secular and the religious, the mundane and the transcendental are more fluid than in Western thought. Secondly, pilgrimage was the only option open to common people to justify travel, and was often used as the 'official excuse', if only in order to get around tight travel restrictions in Tokugawa Japan.

The Japanese concept of *honne* (true purpose/feeling) and *tatemae* (official purpose) which pervades all aspects of Japanese culture is clearly seen in the example of Japanese travel behaviour. While the official purpose for early travel (*tatemae*) was religious worship, the real motive (*honne*) was often pleasure, and, for the Japanese people, what might be referred to as an 'ulterior motive' is a recognized and accepted cultural norm. Even today, Confucian and Buddhist ethics regarding work and leisure remain an important part of Japanese culture and, especially among the older generations, pleasure for pleasure's sake is frowned upon. This in part explains the continuing practice of travel, both domestic and overseas, tending to

have "an educational or religious nuance that camouflages, or at least justifies, the recreational element" (Ueda 1994: 57).

Linguistic analysis also points to the strong connection between religion and tourism. The Japanese word for travel, '*tabi*', originally meant military travel and also has religious origins (Graburn 1983b). The origin of the word *tabibito* (traveller) was *tabebito* "a wandering ascetic, a stranger who would ask for food, who could have been a (Buddhist) holy man asking for alms....."(Graburn 1983b: 50).

Within the context of Japan's culture, history and religious beliefs, there exists no clear dividing line between tourism and pilgrimage. Cohen's definition of a pilgrimage as "a form of 'religious tourism' combining elements of pilgrimage with those of ordinary tourism" (1974:542) is most applicable to Japan. As Graburn (1983b:60) asserts, in the case of Japan at least, "the traveller does not have to decide between being a tourist or a pilgrim, for both modes are part of the larger whole; neither does he have to undergo sharp changes in attitude from awestruck reverence to playful secularity, for they are intertwined parts of one cultural structure". In the context of Japan, a journey to a place of nature or history may be considered as sacred as a journey to a temple or shrine, while the latter may be enjoyed without moral restrictions on behaviour and intent but merely for 'novelty', without losing its status as 'pilgrimage' (Graburn 1983b).

### **2.3 The Development of Pilgrimage**

Pilgrimage in Japan appears to have developed slowly, over time the ascetic wanderings of individuals gradually taking the form of pilgrimage routes then adopted by the aristocracy and later the common masses. The *Kodansha Encyclopaedia* (1983) states that pilgrimage became popular in the Heian period (794 – 1185) among the aristocracy who visited places like Ise Shrine, and Hasedera and Shitennoji temples, and it was during the Edo period (1603 – 1867) that pilgrimage was made popular by all classes of people. The most famous pilgrimage in Japan - around the island of Shikoku - appears in chronicles of the Heian era, when it developed as an ascetic practice involving religious sites (Reader 1987). By the seventeenth century this had developed into a more structured route involving the eighty-eight temples still visited today. Reader (1987) believes it to have been in the latter part of the Muromachi period (1338-1573) that the trip to Shikoku became "a widespread practice involving participants other than religious specialists and ascetics" (Reader 1987: 116). By

the mid eighteenth century pilgrimage was no longer solely for individual ascetic purposes but more commonly for farmers and townspeople travelling with a specific aim such as prayers for good crops, safety and so on (Reader 1987).

According to figures kept by pilgrim lodges in 1764, as many as 36,000 to 48,000 people over a six-month period visited Shikoku for pilgrimage (Reader 1987). In order to accommodate these huge numbers of travellers, towns and pleasure quarters developed near major religious sites. *Monzen machi* – literally ‘town in front of the gate’ - were commercial areas which developed around shrines or temples, offering accommodation, food, gift shopping and geisha establishments. According to the *Kodansha Encyclopaedia* they developed to serve “the pilgrims they attracted, who required the services of an embryonic tourist industry” (1993: 1003).

Kato (1994) outlines the development of another popular pilgrimage route - to the shrine at Ise. Between the months of April and May 1705, 3,620,000 visitors to this shrine were recorded. By the end of the Edo period, around Ise shrine, a pleasure quarter called *Ashi-arai-ba* (literally ‘a place to wash the feet’) had developed within the boundaries of the outer shrine and Kato believes pilgrims would "go through the motion of praying at the shrine and then spend the bulk of their trip in the pleasure quarters" (Kato 1994: 57). The atmosphere at Ise was described as "festive and uninhibited" (Kato 1994: 59). Even at the time, this phenomenon was recognized and lamented by some. In *Kiyū Shōran*, a famous compendium of miscellaneous information published in 1830 by scholar and bibliographer Kitamura Nobuyo, he wrote:

Nowadays people [living around Edo] are fond of going to tour Kyoto, Osaka and Nara, but they never go to visit the Kashima Shrine [one of the most famous shrines in the vicinity] for worship. They are going to visit many shrines and temples, but it is only for nominal purpose. The true aim of the travel is absolutely for pleasure. Of course, they visit the Ise shrine, but only because it is just on the route of the popular tour to Kyoto, Osaka and Nara (cited in Formanek 1998: 168)

Other authors have reviewed surviving literature and accounts of popular pilgrimages and support the idea that indeed pleasure had become an important aspect of pilgrimage. Susanne Formanek (1998) looks in detail at the pilgrimage to Mount Tateyama, and concludes that by the Edo period pilgrimage involved institutionalised and commercialised trips in which

"sightseeing and pleasure seeking was at least as important, if not more important than the religious goal" (Formanek 1998: 178).

While restrictions on travel within Japan and the effect this had on popularising pilgrimage will be discussed in the next section, it is clear that in reality, by the Edo period, religious reasons were only one part of 'pilgrimage' trips, which were also concerned with pleasure and enjoyment. This touristic side to pilgrimage was fostered by the development of facilities to serve and encourage pilgrims. Hence all travel in Japan at this time involved visits to temples and shrines, and pilgrimage and tourism became inseparable. Only the true intent of the individual, which cannot be known, differentiated the two activities.

#### **2.4 The Politics and Infrastructure behind Pilgrimage and Early Travel**

Another feature of pre-modern Japan to encourage pilgrimage by the masses was the impressive infrastructure developed by the *bakufu* (Tokugawa government) to support travel. The original motivations for the network of overland communication infrastructure set up by the *bakufu* were political and economic (Vaporis 1994). The main route of this network linked Edo (present-day Tokyo) to Kyoto and this developed into the 'five-highways' (*Gokaidō*) emanating from the capital. In 1635, a system of 'alternate attendance' was developed whereby *daimyō* (lords) and their entourage were required to travel from their local area to Edo annually to wait on the Shogun, and this was one of the motivating factors for the establishment of central travel routes. "In its completed form, the *Gokaidō* network consisted of 248 post stations, which were, depending on the road, spaced from four to twelve kilometres apart" (Vaporis 1994: 22). These stations were designed as rest stops, transportation and information centres, and around them grew recreation areas that included inns, eating and drinking establishments, and *meibutsu* (famous things to be purchased).

It is considered that Tokugawa Japan had at that time "attained the world's highest level of overall infrastructure formation" (Vaporis 1994: 5). Combined with a political stability that was to last 265 years, and relative economic security, this well developed travel infrastructure contributed to the emergence of travel as a form of recreation for the masses that remains today a national pastime for the Japanese (Vaporis 1995). However, despite the impressive infrastructure that was in place in Tokugawa Japan, government regulations on who could travel and for what purpose restricted travel for the common people. It is clear that these

restrictions played a large part in the secularisation of pilgrimage and led to it becoming merely an excuse to circumvent the active discouragement of pleasure travel.

*Sekisho* (barriers) were established along major routes, officially to monitor compliance with the system of alternate attendance (Vaporis 1994: 99), and to control travel to and from the capital for security reasons. By 1625 a set of regulations regarding procedure for passing through these check points was established and 'suspicious-looking people' and women came under particular scrutiny. In order to pass these check points travel permits were required. Two types of permits were available: the first, transit permits (*sekisho tegata*), were a form of identification to pass through *sekisho*. They were issued by the government and were generally only valid for passage through a particular station (Vaporis 1995). The second type, passports (*ōrai tegata*), were issued by local government offices or one's local temple, for pilgrimage or business, and could be used to pass through as many stations as needed over a given period of time (Shinmura 1997). Passports were easier to obtain and more convenient than transit permits and therefore more popular. Because they were often issued by temples, pilgrimage was the obvious intention stated. Pilgrimage carried its own restrictions, instituted to control the amount of time common people spent away from their fields and the money used outside their local area.

The Tokugawa government did not recognize the concept of pleasure travel, and in fact outwardly discouraged it. For economic and disciplinary reasons it was considered vital that commoners remained at home and working on the land. Tokuhisa (1980) links these constraints to the prevailing Confucian ethics of the time, which supported the idea that free time should be used for work, and "enjoyment for its own sake was frowned upon" (Tokuhisa 1980: 7). In 1721 in a treatise on civil administration it was stated that "no one of any class travel without reason" (Kanzaki 1992: 67).

The only accepted and legitimate reason left to the common people to travel was that of religious pilgrimage. In this way, "activities that might normally be frowned upon as impractical and frivolous were condoned on the basis of their group-oriented, religious nature" (Kato 1994: 54). Thus in reality, pilgrimage became the ostensible reason behind trips of a more pleasurable and secular orientation. Reader (1993) states, "besides seeking miracles and salvation, then, there were pilgrims whose primary interest was in seeing places and enjoying themselves, and who travelled in the guise of the pilgrim because this provided

legitimate cover for their intents” (Reader 1993: 123). As the travel historian Shinjo Tsunezo has commented, “virtually all Japanese travel consisted of visits to shrines and temples, and the terms *sankei* (pilgrimage/visit to a shrine) and *tabi* (travel) were virtually synonymous in pre-modern Japan” (cited in Reader 1993: 123).

## 2.5 Features of Japanese Pilgrimage/Travel - Some Important Concepts

Certain features that developed in order to support and maintain the popularity of pilgrimage during the Edo period can be clearly linked to modern Japanese travel habits. The first relates to the organization and style of group travel. Despite pilgrimage being available to the common masses in the Edo period, it was still restricted by financial constraints. This was overcome by the participation of individuals in *kō* - village or religious groups. A system developed whereby the members of the *kō* contributed money and selected several members to make a pilgrimage on the group’s behalf. Travel arranged by the *kō* meant representatives of one group travelled together with people from other villages in the area (Vaporis 1995).

Arrangements for the representative pilgrims were made by *oshi* – low-level priests connected to religious sites, thought to have emerged in this role around 1181 (Kanzaki 1995: 44), and now compared to modern-day travel agents. According to Umesao (1995), these priests arranged everything from

...setting up the route from provincial villages to a particular shrine or temple, guides along the road, reservations at inns, tour guides, worship at the temple or shrine, entertainment such as theatres or visits to the pleasure quarters, and the provision of lodgings (1995:6)

While originally, *oshi* belonged to a particular shrine or temple, they later worked independently and as the concept of pilgrimage became more commercialised and secular it is believed the *oshi* and monks were “at least as eager to earn money as to bring about the religious edification of the pilgrims” (Formanek 1998:30).

Another tradition to stem from the *kō* group was the giving of gifts (*miyage*), still such an important part of the Japanese travel culture. Because pilgrims were travelling on behalf of, and thanks to, the generosity of fellow members, it was important those at home be kept in mind throughout the pilgrimage and presented with a gift when the traveller returned. Graburn (1983b) believes *miyage* to be an important legitimising on-site marker symbolizing the link between the traveller and those of their group left behind. In modern travel, money and other parting gifts (*senbetsu*) are still given to friends and family preparing to travel. The

traveller must then return with *miyage* for all from whom they received *senbetsu*. Graburn (1987) states that the giving of *miyage* is governed by two principles: "1) it must be a culturally accepted symbol or souvenir of that particular place, and 2) it must cost approximately half of the *senbetsu* given" (Graburn 1987: 19).

In early Japan these gifts were not only tokens of gratitude but also important for confirmation that chosen group members had completed the pilgrimage and reached their destination. *Kinen* (souvenirs/memorabilia) thus became an important way to legitimise and commemorate the trip. Graburn (1987) defines *kinen* as, "culturally approved evidence of having been to the right place and done the right things" (1987: 21). In modern travel perhaps the most important form of *kinen* is the photograph. It is extremely important for Japanese people to have their photo taken, as a group, in front of the 'must see' sights at each destination. A photograph of the site itself is not enough; it must include the travel group to be legitimate. *Kinen-sutampu* (souvenir stamps) are now often given on tickets to national attractions and this custom also developed from early pilgrimage - pilgrims carried books to be stamped at each temple as proof they had been there (Graburn 1987).

Another important concept to develop from the pilgrimage era is that of *meibutsu*. *Meibutsu* essentially means 'famous thing' and refers to the specialty products and/or attractions a destination offers. Unless a destination is famous for something, whether it be food, craft items or attractions (including temples and shrines), it is often not thought to be worth visiting. Thus pilgrims and modern travellers travel to culturally approved places and return bearing *meibutsu* (famous things) in the form of *miyage* (souvenirs) and *kinen* (memorabilia).

In order to fulfil the pilgrim's requirements for *miyage* and *kinen*, pleasure quarters and post stations near temples and shrines, as well as the religious institutions themselves, grew to include gift shops and stalls selling specialty items and religious talisman (*meibutsu*). By the late seventeenth century this in itself had grown to be an important industry (Vaporis 1995), providing income for temples and shrines and further encouraging a more commercialised and secularised type of travel in which on-site markers became as important as the visit to the shrine or temple itself.

Graburn (1987) summarizes the nature of Japanese tourism established through pilgrimage:



Each place is known by its central symbol, and each institution by its historically, culturally and naturally significant markers. The conceptual nature of travel is to pick a site, or a circuit of approved sites, to know what to expect when one gets there, to confirm through on-site markers that one is there, to record in material form that one has been there, and to carry back home material evidence that one has been there (1987: 20).

Ishimori (1995) discusses the concept of *meisho* (famous place), locations originally made popular through mention in early writings and poetry. As travel became accessible to the masses in the Edo period these places became popular and actual tourist destinations. What is interesting is that sixty percent of the *meisho* published in the early nineteenth century *Edo Meisho Zue* (1834) (Pictures of Famous Places of Edo), were temples and shrines. Despite the fact that by this time pleasure travel had become a form of travel in its own right and not under the auspices of religious pilgrimage, the majority of famous sites in Japan remained religious sites.

The final development encouraged by the popularity of pilgrimage throughout Japan was the publication of guidebooks, as early as the 1680's (Reader 1993). This literature grew to include illustrated books, maps, how-to travel handbooks, and the development of a specific 'travel-diary' genre of literature that became not only a popular form of general reading material but also a catalyst for further growth in the popularity of travel.

Hence, a brief look at the development and style of 'pilgrimage' in Japan identifies the most unique aspects of modern Japanese travel habits: a preference for group travel organized by a professional guide, a desire to visit well-known places, the importance of memorial photographs and souvenirs, and the custom of purchasing *miyage* (gifts) for family and friends. Likewise, these concepts, as well as more general ones such as *meisho* and *meibutsu*, support the argument that for the Japanese themselves the division between sacred and profane, pilgrimage and tourism, is and has always been, a vague one.

## **2.6 The Recent Past**

Despite being one of the most popular forms of relaxation, and by all accounts a widespread activity in Tokugawa Japan, travel for pleasure remained frowned upon and discouraged by the government. The Tokugawa policy was also one of 'national seclusion' and for the two and a half centuries of their rule Japanese people were forbidden to leave the country. Takashina (1992) believes that despite official prohibition, travel had emerged as a kind of national

pastime during the eighteenth century. Although officially referred to as pilgrimage "the term *monomi yūsan* meaning 'sightseeing jaunt' expresses the spirit of these trips, in which the destination was less important than the process of getting from here to there, savouring all manner of unaccustomed experiences and amusements along the way" (Takashina 1992: 65). In the mid nineteenth century the military feudal regime was overthrown and a central government established with the emperor nominally leading the country. Not only was this new government no more enthusiastic about travel for pleasure's sake, but they also discouraged pilgrimage as it was seen as a 'relic of a primitive past' and their intention was to make Japan a 'modern' country (Graburn 1983b: 54). This attitude to travel prevailed and "long distance travel for ordinary people was confined to seeking work in the cities, journeying home for annual events (to visit family ancestral graves [*haka mairi*], and the shrine or temple of one's allegiance), and making occasional pilgrimage, combined with sightseeing, to national religious sites" (Graburn 1983b: 55). The only people to commonly travel abroad at this time (to Europe, the U.S and China) were diplomats and scholars. It was not until World War One, when Japan's economy began to boom, that pleasure travel began to expand, and 'pure tourism' did not emerge until after World War Two (Graburn 1983b).

In the 1950's, the government, while encouraging inbound travel, instituted various barriers to overseas travel by Japanese people. These included passports that were only valid for one trip, a requirement for committee approval to travel overseas (tourism not being considered a valid reason), and a limit of \$500 on foreign exchange to be taken out of Japan (Carlile 1996). In effect, overseas travel was limited to "such people as government officials, participants in cultural exchange programs, those on special study programs and employees of international trading firms" (NZTP 1986: 2). The impetus for the easing of these restrictions was Japan's entry into the OECD, one of the conditions for entry being a liberalization of the system of foreign exchange and exit controls that had hindered outbound tourism (Carlile 1996). For the average Japanese citizen this liberalization came into effect in 1964, when Japan held the Tokyo Olympics.

The result of Japan's isolation and its relatively late entry to world tourism can be linked directly to the preference for package tour style travel. Not only was language a major hurdle for Japanese people intending to travel abroad, but in every sense they were inexperienced overseas travellers (Graburn 1983b). Cultural barriers and a lack of facilities for Japanese customers meant overseas travel was an exciting yet daunting proposition. Combined with

generally low cultural self confidence (Kim and Lee 2000), the only 'safe' option was group travel with an experienced guide to take care of details. Travel at this time remained an expensive proposition for most Japanese people, and was considered a 'once in a lifetime' experience. Carlile (1996) believes this meant, "tourists themselves demanded as much tangible 'output' from the experience as possible. Gruelling multi-destination 'if this is Tuesday it must be Brussels' - style tours were thus preferred" (Carlile 1996: 13).

By the early 1970's the steady increase in overseas travel had become a booming industry. Rising disposable incomes, an increase in leisure time, a decrease in airfares, and the strength of the yen are considered the primary factors contributing to this boom (Carlile 1996, NZTP 1986, Tokuhisa 1980). In 1974, over two million Japanese travelled overseas compared with only 128, 000 just ten years earlier (Tokuhisa 1980). By the 1980's the Japanese government had done a complete turn-around and was actively encouraging overseas travel, primarily to help reduce Japan's huge surplus of trade balance and promote better international relations.

In less than a generation, Japan became one of the leading tourist-generating countries in the world (Sakai, Brown and Mak 2000). Despite this relative boom, when compared to other industrialised countries travel propensities remain low, suggesting the potential remains for significant increases in the number of Japanese travelling overseas in the future. Despite population aging, Japanese international travel is expected to continue to rise, albeit at a slower pacer than in the past (Sakai, Brown and Mak 2000). In 1987 the government announced the "10 million plan" with a goal of encouraging ten million Japanese to travel overseas by 1992. This target was reached one year earlier, putting Japan in third place in international tourist arrivals (Cha, Cleary and Uysal 1995). The government's current plan "two-way tourism 21" is aimed at enhancing understanding between Japan and other countries through the promotion of both inbound and outbound tourism in the 21st century.

## **2.7 Conclusion**

Pilgrimage and travel have long been synonymous in Japan, and the development of pilgrimage is vital to an understanding of present-day Japanese travel behaviour. The infrastructure in place to support travel in early Japan made pilgrimage accessible to the masses, yet contributed to its secularisation by insisting that all travel come under this definition. Many of the features of pilgrimage still remain important aspects of Japanese overseas travel habits. A preference for group travel organised by a professional guide is

likely to remain strong, especially amongst older Japanese travellers. The *senbetsu-miyage* custom remains widespread and therefore shopping for gifts is an important part of travel for Japanese people. Well known destinations (*meisho*) and the things that make them famous (*meibutsu*) are likely to be important in determining both destination choice and the selection of activities once the traveller arrives. Likewise, the long history of *kinen* explains the importance of group photographs and onsite markers to Japanese visiting famous locations. A further reasonable assumption to be inferred from Japan's travel history would be a religious nuance to travel that may still be combined with Japanese tourists more widely observed secular consumption behaviours. In the context of Japan's religion, its long and unique history of travel and pilgrimage, prolonged isolation, and the country's sudden and recent emergence into the world tourism arena, uniquely Japanese travel habits become much more understandable.

## **Part Two - Characteristics of Modern Japanese Travel Abroad**

### **2.8 Introduction**

Despite its relatively short history, the rapid growth in overseas travel has brought with it changes in Japanese travel styles and motivations. The dramatic rise in income levels and the 'westernisation' of Japanese lifestyles have also affected travel habits. Overseas travel has become a more casual affair, expectations have risen, and the Japanese person has become more discerning in their choice of destinations and activities. According to JTB, in 2004, 48% of travelers were taking their first overseas trip, while 4% indicated it was their 10th or more trip. Since the first such survey in 1989 the number of Japanese people who have been overseas has steadily increased – 2004 data show that 51% of Japanese respondents have experienced overseas travel. These factors alone explain the growing sophistication of Japanese travellers. Japanese people tend to stay longer in one destination rather than visit as many places as possible and want to 'experience' rather than just observe foreign lifestyles and cities (Nozawa 1992). The following section reviews the current literature with respect to various important characteristics of Japanese travel behaviour. Mok and Lam published a thorough review of the literature pertaining to Japanese tourist behaviour in 2000; seven of the following sub-headings are based on their conceptualisation of the key behavioural attributes of Japanese tourists.

## 2.9 Preferred Destinations

There have been a number of studies that have investigated the types of destinations Japanese travelers prefer. Morris's (1990) summary of various surveys regarding Japanese travelers concluded that they preferred places with natural scenery and good beaches, as well as cities offering modern culture and historical spots. Good shopping and 'crime-free' reputations were also extremely important. According to Nozawa (1992), desirable destinations are those with 'abundant natural and scenic beauty', 'plenty of sun, sand and sea', 'cities with an abundance of modern culture and historical spots' and 'crime-free cities rich in culture and history'.

Brian Moeran (1983) analysed the language used in Japanese travel brochures as a method of understanding the aspirations of tourists. Nature arises as a major theme in the tourism brochures and it is typically depicted by words such as beautiful (*utsukushii*), grand (*yūdai*), opulent (*yutaka*), and unpolluted (*yogore no nai*). Thus the focus is on nature in its totality rather than activities that can be enjoyed within nature, although he notes that the younger generation especially are increasingly interested in experiencing nature rather than mere sightseeing. Food is another key theme in tourism brochures and is portrayed as one way the Japanese are invited to experience being abroad. Travel to foreign countries is also portrayed as an escape from city dwelling – a chance to sample 'nature' and an opportunity to participate in sport and recreation activities tourists cannot regularly do at home. Travel brochures also showed an emphasis on art and culture and information was specifically related to a particular destination's 'cultural markers' (for example in France - fashion, cuisine, the Eiffel tower). He notes brochures are full with foreign cultural information regarding architecture, history, tradition, art, fashion and culture. Moeran believes individualism is becoming increasingly important in Japanese society and this is reflected in overseas travel trends: people are seeking more authentic experiences and want to participate and experience rather than observe.

Kazuo Nishiyama (1989) devotes a chapter in his book 'Strategies of Marketing to Japanese Visitors', to overseas visitor attractions and identifies major destination attractions for Japanese travelers as: nature and scenery; historical sites and famous architecture; amusement parks and entertainment; outdoor sports; rest and recreation; gambling; and romantic encounters. According to a study by You et al. (2000) the top-rating destination attributes for

Japanese travellers were: outstanding scenery; historical or archaeological places; nice weather; standards of hygiene or cleanliness; and availability of pre-trip information.

With regards to actual destinations JTB (2005), reports that Hawaii and Australia have been the two most preferred destinations for Japanese tourists since 1999. The remaining top five include Italy, Canada and Switzerland. NZ has moved from ninth place in 2003, to seventh place in 2005, as the most desired destination for Japanese travellers worldwide (see further discussion in section 4.20). The most frequently visited destinations worldwide were – Hawaii, Korea, Hong Kong/Macau, Guam and Singapore.

In a New Zealand context, Marten Weevers (1998) looked specifically at Japanese images of NZ as a destination and believes:

the image of a clean, green, tranquil and uncrowded country, where the people are friendly and well-disposed towards Japan has proved successful in marketing the New Zealand destination. Our English-speaking developed country status; the lack of significant time difference, and therefore jet-lag; opposite seasons; and relative proximity have also helped attract customers (1998: 154).

Gnoth and Watkins (2002) found the top five attractions of New Zealand for Japanese tourist were (in order of importance): scenery and nature experiences, rest and relaxation, accommodation and food, cosiness and a familiar atmosphere and the opportunity to learn new things.

In summary, the findings related to preferred destinations consistently indicate natural scenery, safety and history/culture to be major attractions for Japanese tourists.

## **2.10 Activities**

According to JTB's most recent publication (2005), the top five ranked activities for outbound travelers were natural and scenic attractions, shopping, gourmet sampling, historic and cultural attractions, and visiting art galleries and museums. When compared across age and gender segments, shopping and gourmet sampling were highest among women, and natural and scenic attractions high among the elderly. 90% of the sample stated natural and scenic attractions as their main activities in Oceania.

Other studies have looked at the activity interests of specific market segments. Ahmed and Krohn (1992) reported preferred activities of the 'silver' market, which accounted for 29% of the total Japanese population. They concluded older Japanese tourists were generally passive, and avoided participation in outdoor activities in unfamiliar cultures. However, they liked to watch others engage in recreation activities such as surfing, water-skiing, canoeing, etc.

Lang, O'Leary and Morrison (1993) investigated the 'young female' segment of the Japanese market and employed a cluster analysis based on activities to produce five groups – Outdoor Sports, Sightseeing, Life-Seeing, Activity Combo, and Naturalist. Socio-demographics, travel characteristics and information sources were then used as independent variables to compare the five segments. The Outdoor Sports cluster showed a particular interest in water sports and beach activities, they were generally the youngest segment with lower income levels and shorter length of stays. The Sightseeing segment was the oldest group and had lower English language ability. The Life-Seeing segment enjoyed getting to know the locals and experiencing the local lifestyle, most were single, and few were on package tours. They had a greater command of English and friends and family were an important source of information. The Activity Combo segment had a broad range of interests, the longest stay, and 30% were travelling with their just married spouses. The final segment, the Naturalists, were interested in history, culture and nature, they showed a good command of English, and brochures were an important source of information for them. All segments showed an interest in shopping and sampling the local food; sightseeing in cities was also popular across all segments

NZTB (2005), note that the activities undertaken by Japanese visitors to NZ vary significantly by age. 47% of Japanese visitors aged fifteen to twenty-four mentioned education/study or attending a language school as a primary activity. The younger group were also more likely to mention beaches, cinema/movies, visiting friends/family, and sport as activities. Older Japanese tourists were far more likely to mention geothermal attractions, lookouts/viewing platforms, farm shows, botanical gardens, Maori performances, glow worm caves and scenic boat tours. The top five activities across all age groups in NZ (in order) were: shopping, eating out, walking in city, general sightseeing and scenic boat cruises (NZTB 2005).

A review of the literature on activity choices indicates nature and scenery, shopping, food and sightseeing are the main activities Japanese enjoy when traveling. Gender and age clearly

affect activity preferences, older tourists being more passive, younger tourists having broader interests and higher participation rates.

### 2.11 Travel Motivation / Benefits Sought

Various authors have conducted empirical research on Japanese travel motivations and their findings are relatively consistent. Cha, McCleary and Uysal's (1995) study identified six motivation factors for Japanese travellers: Relaxation; Knowledge; Adventure; Travel Bragging; Family; and Sports. They showed Japanese place an emphasis on knowledge and adventure – wanting to explore the world and learn new things were major motivations. "The Japanese travellers seem to be very eager to acquire new knowledge and to enjoy adventure through overseas travel" (Cha et al. 1995: 37).

Moeran's (1983) analysis of tourism brochures suggests that 'experiencing' foreign countries and 'discovery' are key themes and tourists are invited to experience the thrill of being overseas, to 'melt into' (*tokekomu*) new surroundings and get in touch with the lives of local people. He also notes the important theme of escape in the brochures. Travellers are encouraged to escape the usual pressures of group affiliation and subordination of individual interests to the group. Appeals are made to the second person 'you' (*anata*), uncommon in Japanese speech, and this use of language serves to increase the idea and appeal of individuality, freedom of choice and freedom from restrictions.

Travel brochures use such phrases as 'my pace' or 'my plan' (in English) to make the tourist realize that s/he can do what s/he wants to do once s/he has escaped the confines of Japanese society. The tourist is invited to 'enjoy' herself, to play (*asobu*), to be light hearted (*kigaru*) when away from an environment in which the importance of work (*shigoto*) and seriousness (*majime*) is stressed. S/he is told to take it easy (*yukkuri*), to be carefree (*nonbiri*), to 'relax', to make use of 'free time', to do so as s/he pleases (*kimama*) in a leisurely (*yuttari*), self-composed (*ochisuita*) and easy (*yutori*) manner. In short tourists are invited to do all the things Japanese society has not traditionally permitted them to do... (Moeran 1989:52)

Nishiyama (1996) also addresses the issue of escape as a motive for Japanese travellers and suggests the population congestion and lack of open spaces, parks and sports facilities encourage Japanese to travel overseas in search of space and natural beauty.

Woodside and Jacobs (1985) found the major benefit realised for the Japanese market was time spent with family. Yuan and McDonald (1990) examined data gathered in the US and



Canada to compare the push and pull motivations for overseas travel for Japanese, French, West German, and UK tourists. They found that individuals from the four countries travelled to satisfy the same unmet needs (push factors); however, the attraction of a particular destination (pull factors) differed among nationalities. The ranking of push factors for Japanese travellers, in order, were: novelty; escape; prestige; enhancement of kinship relationships; and relaxation/hobbies. You et al.'s (2000) study show for Japan the top five push factors were: 1) Going places I had not visited before, 2) Having fun, being entertained, 3) Getting a change from a busy job, 4) Relaxing, and 5) Increasing one's knowledge.

Kim and Lee's 2000 study looked specifically at the cultural differences in tourist motivation between Anglo-American and Japanese tourists and concluded that Japanese tourists tend to show more collectivist characteristics in seeking travel motivation, while American tourists tend to show more individualistic characteristics (2000). Japanese tourists rated prestige/status, family togetherness, and novelty significantly higher than American tourists; however, there was insignificant difference between the two groups on the variables of knowledge and escape. Kim and Lee note, however, that Japanese young people especially are showing increasing individualistic characteristics.

Based on qualitative interviews which preceded their survey of Japanese independent travellers to Scotland, Anderson, Prentice and Watanabe (2000) identified seven motivational domains: novelty, independence (escape), prestige, relaxation, understanding (new experiences/culture), development (concerts and plays) and utility (future/career). Heung, Qu and Chu's (2001) study of Japanese visitors to Hong Kong identified five factors to be important to Japanese people and they termed these (in descending order of importance): benefits sought (e.g. shopping, safety, food); exploration (adventure, fun, novelty); attractions and climate; cosmopolitan city; and dream fulfilment (new destinations, fulfilling dreams of travel).

Jang et al. (2002) conducted in-home interviews to obtain information on socio-demographics, trip characteristics, benefits sought, activities, information sources, destination images and levels of satisfaction from a random sample of past or planning Japanese travelers to the USA or Canada. The original forty-six benefit statements were reduced to eight factors through factor analysis, the eight factors were described as; nature and environment, knowledge and entertainment, history and culture, outdoor activities, family and relaxation, escape, value, and

lifestyle. Overall, value (value for money, information) was rated as the most important benefit; nature and environment, knowledge and entertainment, family and relaxation and escape were also important benefit factors. History and culture, outdoor activities and lifestyle were not rated as highly.

JTB reports that preferred reasons for travel have remained unchanged since 1997 (NZTB 2005). The top two reasons are 'enjoyment of nature and scenery' and 'visiting historical sites and buildings'. These were followed by preferences for 'rest and relaxation', 'local cuisine', 'shopping' and 'experiencing different cultures (NZTB 2005). Specific to New Zealand, NZTB's 1993 report identified new and different experiences, and a need to escape stress and have fun, as the key needs determining destination choice for Japanese travellers.

The table below summarises the important travel motivations found in the literature. Escape consistently suggests itself as a major motivation for Japanese travellers. Family time and relaxation are frequently noted as motivations; status, novelty, exploration and relaxation are also consistently mentioned.

**Table 1**

Summary of Travel Motivation Literature

	Exploration/ discovery	Escape (Independence)	Family	Fun	Relaxation	Knowledge	Status	Novelty
Moeran (1983)	X	X						
Woodside and Jacobs (1985)			X					
Yuan and McDonald (1990)		X	X		X		X	X
NZTB (1993)	X	X		X				
Cha, McCleary and Uysal (1995)			X		X	X	X	
Nishiyama (1996)		X						
Anderson (2000)	X	X			X		X	X
You (2000)		X		X	X	X		X
Kim And Lee (2000)			X				X	X
Jang (2002)		X	X		X	X		
<b>Total</b>	<b>3</b>	<b>7</b>	<b>5</b>	<b>2</b>	<b>5</b>	<b>3</b>	<b>4</b>	<b>4</b>

## 2.12 Travel Style

Both simple observation and the literature support the cultural stereotype that Japanese predominantly travel in package tours (Carlile 1996, Dace 1995, Lang, O'Leary and Morrison 1993, Nozawa 1992). Various explanations for this have been postulated, including: the

cultural value of collectivism, and the comfort found in group travel (Ahmed and Krohn 1992); practical issues such as ease of organisation and cost (Carlile 1996); historical and cultural issues that continue to affect travel (see section 2.5); and the lack of confidence and the relative inexperience of Japanese travellers (Carlile 1996). According to Lagana (1980), the word *tabi* (travel) carries a nuance of unease (*fuan*), and danger. Thus the security of a good travelling partner or group is essential. This idea is captured in the Japanese sayings (*kotowaza*) ‘travelling is difficult to face without people to depend on’ (*tabi wa ureimono tsuraimono*), and ‘in travel the important thing is a good companion (*tabi wa michizure*)’ (Lagana 1980:123,124). Pizam and Sussman (1995) believe travelling in a group reduces culture shock, fulfils social needs, provides identity and a sense of security. From a sociological perspective Nishiyama (1996) stresses the importance of cultural socialisation of Japanese into group travel. From kindergarten trips, to annual school excursions (*shūgaku ryokō*) and company recreation trips, he argues this socialisation means Japanese are much more familiar and comfortable with group travel than individual travel. Fukada (1979) notes that the difficulties of language, the feeling of being over-awed in a foreign city, and the general feelings of unease associated with travel, mean Japanese are more comfortable travelling as members of a group.

Prior to the 1970’s travel for Japanese people was still an expensive proposition limited to the wealthy; therefore, tourists demanded as much ‘tangible’ output as possible and Carlile (1996) believes this led to the stereotypical Japanese-style tours. Japanese at this time had very little or no overseas travel experience, and language and other cultural barriers made travel difficult; therefore group travel was preferred. However, as travel becomes cheaper and more accessible, and the experience and sophistication of Japanese travellers increases, travel styles are changing. In 1996 Carlile noted that leisurely stays at a smaller number of destinations were replacing gruelling tours, package tours were being whittled down and ‘options’ increased, and a growing number of travel agents catering to free and independent (FIT) style travel were emerging.

Kato (1994) postulates that just as pilgrimage in early Japan was a way of justifying a more hedonistic type of pleasure travel, so present-day group travel often camouflages the recreational aspects behind educational and group reasons. “...The package tour format, with its guaranteed, standardized content, seems to offer one final benefit: it is a kind of insurance against disapproval in a society where everyone is expected to be doing something useful at

all times. Participants can justify their indulgence in travel because society favours this travel option as the most efficient way to learn about foreign countries” (1994:59).

Yamamoto and Gill (1999) conducted a total of 1399 in-home interviews with Japanese people who had travelled overseas in 1989 and 1995. ANOVA<sup>1</sup> analysis was used to compare package tour travellers with non-package tour travellers regarding travel patterns, motivations for overseas travel, activities, sociodemographics and other variables. Their conclusion was that there is a growing demand in Japan for more individual forms of travel but lean/flexible or specialised package tours will continue to attract significant segments.

According to JTB (2005), 45% of outbound Japanese tourists use package tours and 39% arrange their own travel. Trends over recent years show package tours are remaining steady, while individually arranged travel is increasing and group travel decreasing. More experienced travelers are most likely to arrange their own travel. Among package tour participants 60% were on full package tours (an increase), while free-time type tours decreased. The package tour participation rate is particularly high among the elderly and lowest among young and middle-aged men. JTB reports 57% of tourists to Oceania traveled by package tour, and 27% FIT. Students and single women are more likely to travel with friends or acquaintances, while the majority of married, middle-aged and elderly women travel with family. The elderly are most likely to travel with their husband or wife.

In regards to the travel style of the Japanese tourist to NZ, NZTB has noted an increase in the number of Japanese tourists traveling semi-independently, increasing from 15% in 2002 to 33% in the year to March 2005. Transportation and accommodation statistics support the idea that the majority of travelers still travel on organized tours (63% of Japanese travelers used plane as their primary transportation, 61% tour coach and only 29% car. 66% stayed in hotels; 21% in bed and breakfasts/guesthouses, and 15% in both motels and backpackers). 23% of Japanese travellers classified themselves as FIT, 33% as Semi-Independent and 39% as package tourists (NZTB 2005).

### **2.13 Length of stay**

Another distinct and generally accepted view of Japanese travellers is their comparatively short length of stay in overseas destinations (Carlile 1996, Lang, O’Leary and Morrison 1993,

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<sup>1</sup> Statistical technique used to determine differences between groups on two or more independent variables

Nozawa 1992). The most cited explanation for this is the cultural value placed on work in Japan and therefore the difficulty of taking time off to travel. Nozawa (1992) believes this deeply embedded cultural value is unlikely to change and that short stays will continue to be a characteristic of Japanese travel.

Recent statistics (JTB 2005) show 27% of Japanese traveled for one to four days, 37% five to seven days and 29% eight to fourteen days. For Oceania the majority of travelers stayed five to seven days (49%), 37% for eight to fourteen days and a very small percentage one to four days. Data from NZTB shows that the length of stay in NZ is slowly rising, the average length of stay in the year ended March 2005 up to 21.9 days, compared to 16.5 days in 1998. The majority of Japanese tourists in the year ended March 2005 stayed five to seven days (NZTB 2005).

#### **2.14 Status**

Overseas travel has long been considered a status symbol for Japanese people (Clammer 1997, Moeran 1983, Nobuo 1988). Moeran (1983) discusses how status has affected recent developments in travel styles (group travel is viewed as being lower status and there is an elitist emphasis on individual travel), and destination choice (the distance travelled is more or less equivalent to financial status). Travel abroad is part of the Japanese concern for their position in society, an overseas honeymoon is practically essential, and a knowledge of things 'western' important (Moeran 1983). The overwhelming use of English loanwords in travel brochures is interpreted by Moeran to be a reflection of the Japanese admiration for Western culture. In contrast to the language used in domestic tourism brochures, foreign travel brochures use descriptive adjectives in romanised Japanese such as 'sporty', 'active', and 'modern' to describe overseas places and activities.

#### **2.15 Age**

Age is another important consideration in the discussion of Japanese tourists. There is a genuine respect for age and hierarchy in Japan and many aspects of Japanese life are determined by age.

Gilbert and Terrata's (2001) study compared older and younger Japanese visitors to the UK. The younger people expressed a desire to travel, follow their own desire and assert their individualism. The older group, however, wanted to go to famous, popular places. For both

groups novelty was an important motivator, as were new/unusual experiences, different cultures, and escape. The younger group also sought to broaden their views, understand another culture and go somewhere completely new. In general their findings indicate that escape was a common ‘trigger’ for older people to travel, while enhancing their experiences was more common for the younger tourists. Scenery, heritage/history, culture and relaxation were important pull factors for both groups; knowledge, education, adventure, romance and interaction with the local people were significantly more important to the younger segment. The authors challenge the idea of status as an important push factor for outbound travel, believing that, especially for the young, travel is no longer a prestigious product. According to their results, shopping is also no longer an important motivating factor for travel. From a Maslow (1954) motivational point of view their results indicate older travellers are seeking to fulfil ‘belonging’ needs – they seek famous places, prefer group tours to create a sense of shared identity and free them from language concerns. On the other hand, they believe younger tourists are seeking to fulfil higher order needs such as ‘esteem’ or ‘self-actualisation’. They follow their own preferences more, want to be distinguished from others and view overseas travel not only as an opportunity for new experiences but also for self-examination, self-enhancement and broadening of their views (Gilbert and Terrata 2001).

The fastest growing age group of visitors to NZ is the fifty-five to sixty-four year old age group, making up 27% of the Japanese market. This is followed by fifteen to twenty-four year olds (21%) and twenty-five to thirty-four year olds (20%) (NZTB 2005).

## **2.16 Service Expectations**

The quality of products and services in Japan is usually uniformly high and customers are treated with extreme courtesy and respect. In order to better serve and satisfy Japanese guests an understanding of the basis for these expectations is important to tourism service providers. According to Fukada (1979), Japanese expect to be understood and provided for in service situations without having to ask, as this makes them uncomfortable.

Dace (1995), in a paper examining Japanese consumer behaviour in reference to the UK hotel trade, stresses the high level of service Japanese are accustomed to at home. He also comments on the different perceptions of what constitutes good service and notes Japanese guests would expect a pro-active approach, i.e., a receptionist anticipating their requirements, and ‘extended support’ beyond the defined duties of service staff. Respect for hierarchy and

the use of honorific language are also important cultural traits that influence the Japanese experience of service. Dace believes courtesy, etiquette and patience are key behaviours when dealing with the Japanese and stresses not hurrying them and giving them time to confer on decisions. The concept of *wa* or harmony needs to be understood and anything intrusive to the group avoided. As security is always a concern, advice, attention to and checks on belongings and personal safety are important.

Reisinger and Turner (1998) found five cultural dimensions, which differed significantly across cultures, regarding expectations of service provision. For the Japanese market the most critical factors were courtesy and responsiveness, competence and interaction. According to Reisinger:

The focus should be on delivering a significantly higher level of service quality and adopting the mentality of Japanese tourists. The emphasis should be on service punctuality, professional competence and apologetic attitude by service providers, social etiquette, customer differentiation based on social status and age, sense of order, politeness and respect, accuracy and adequacy of information, concern about the collectivist needs of the Japanese tourist, and binding personal relationships (1998:1223).

## **2.17 Concerns**

The key concerns hindering overseas travel identified by respondents of JTB's 2005 study indicate security, language, cost, anxiety about health, and fear of flying. Long work hours and a lack of holidays were also noted by Carlile (1996) as a major constraint on overseas travel, and despite a new government initiative to make Japan a 'lifestyle superpower' and attempts to reduce work hours and increase holidays, Japanese companies remain resistant to change (Carlile 1996).

Gilbert and Teratta (2001), in their study comparing younger and older outbound Japanese travellers, found peace and order, communication in English, expense, and time available to be the major concerns of Japanese travellers to the UK. Expense and time were of particular concern to younger travellers. Respondents were also concerned about how to behave in a foreign culture. The authors link the time constraint to Japan's workaholic culture and the fact that, despite the systems in place to allow for longer holidays, Japanese workers are reluctant to take them due to the emphasis on diligence in Japanese culture. They believe English language ability remains a concern even for younger Japanese and tourists feel shame and embarrassment due to language difficulties. Fukada (1979) provides specific examples of

language difficulties experienced by Japanese travellers such as instructions at international airports, remembering hotel and place names, and asking for help when lost.

NZTB (2005) report that Japanese travellers to NZ are concerned about safety, their ability to speak English, how they will be perceived in a foreign country, and how difficult it is to travel here. They note that older and less experienced travellers are particularly concerned about safety.

## **2.18 Shopping**

The cultural traditions of *omiyage/senbetsu* and *kinen* described in Part One of this chapter explain why shopping is an integral part of travel for Japanese tourists. Many items are also cheaper overseas than in Japan and this is a further incentive to shop. Moeran (1983:99) believes “one of the pleasures – and indeed one of the ‘musts’ – of going abroad is that of being able to purchase brand name goods in their country of origin”.

Hobson and Christensen (2001) look in depth at cultural issues affecting Japanese tourists’ shopping behaviour and identify five important cultural factors little understood by Western retailers. The first is the importance of retail service (the importance of proper greetings, language, personal advice and the need to assure and re-assure the Japanese consumer that their purchase decision is a good one); secondly, the importance of high quality, decorative packaging; thirdly, ‘*saabisu*’, or tangible premiums, discounts and appreciation shown to regular customers or those that spend a lot of money; fourthly, a sales commission to the Japanese tour guide for bringing the group in; and fifthly, the importance of time constraints given the limited schedule most tour groups are on. Hobson and Christensen argue that a lack of understanding of these cultural factors is the reason Japanese owned/operated stores out-perform local stores in foreign destinations. According to Keown (1989) the main sources of shopping information for Japanese tourists are their tour guides, advertisements in Japanese language publications, and recommendations by friends or people they meet at the destination.

## **2.19 Japanese Culture and Travel Behaviour**

Two studies have looked specifically at the relationship between Japanese culture and tourism behaviour. Ahmed and Krohn (1992) compared Japanese and American tourist behaviour and believe there are ten important concepts influencing Japanese consumer behaviour: 1.



**Belongingness** - the comfort in togetherness that encourages group style travel. 2. **Family Influence** - the importance of extended family left at home and the tradition of *senbetsu-miyage* (see Part One). 3. **Empathy** - Japanese rarely display displeasure as this would be disruptive. 4. **Dependency** - Japanese tourists demand constant care and attention. 5. **Hierarchal Acknowledgments** - the importance of superiority and rank. 6. **Propensity to Save** - in Japan there is an emphasis on saving for an emergency, i.e. to overcome basic insecurity; therefore risk reduction strategies are important for Japanese. 7. **Kinen** - culturally approved evidence of travel to a prestigious tourist destination is important. 8. **Tourist Photography** - photos of the travelling group at important sites are an important form of *kinen*. 9. **Passivity** - older Japanese tourists especially prefer passive activities; they enjoy watching but try to avoid participation. 10. **Risk Avoidance** - the Japanese show a cultural predisposition to avoid risk and adventurous leisure pursuits; however, they note this is changing for younger generations.

Based on the suggestion that nationality is one factor that can account for differences in tourist behaviour, Pizam and Sussman (1995) surveyed UK tour guides regarding their perceptions of Japanese, French, Italian and American tourists. Factor analysis identified five factors of tourist behaviour, which were compared across the nationalities using analysis of variance (ANOVA). On the 'Social Interaction' factor Japanese tourists were perceived to keep mostly to themselves and avoid socialising with other tourists. Tour guides thought they seemed more interested in artefacts than people and avoided local food and beverages, preferring to eat their own cuisine. Japanese were thought to shop the most, take the most photographs, travel in groups and have relatively high trust in tourism service providers. On the 'Activities Preference' factor Japanese were perceived to be the least adventuresome and the most passive. Regarding 'Bargaining and Trip Planning' the Japanese were perceived to plan the most. On the 'Knowledge of Destination' factor Japanese were perceived as less interested in 'authenticity' and quite happy with 'staged' experiences. Overall, the Japanese were perceived to be the most distinct of the four nationalities. The authors offer some suggestions to explain these differences, linking the Japanese preference for their own cuisine with Hofstede's high uncertainty avoidance score, and the preference for group travel to Hofstede's individualism/collectivism score.

Reisinger and Turner (2002a, b) conducted research into the importance of culture on tourism interaction with five language groups of Asian tourists to Australia, including Japanese

respondents. They found five key dimensions of cultural difference between Asian tourists and Australian hosts, these were: communication (the Asian markets do not tolerate ambiguity and risk taking); family /competence (family needs and security are concerns for Asian travellers); interaction (Asian tourists are oriented toward group interests and needs); feeling displays (the Asian markets do not display their feelings in public); and satisfaction (for the Asian market satisfaction depends on the development of an atmosphere of closeness and cooperation and a higher standard, more personalised and customer oriented approach to service). In the Japanese sample three specific dimensions were identified as important in tourism interaction – *perceptions of service helpfulness* in terms of being punctual, informative, trustworthy, respectful and polite; *competence*, which was seen to be dependent on personal qualities such as being self-controlled, logical, obedient and self-respectful; and *greeting*, the importance of addressing people by second names, titles or function as opposed to the Australian practice of first name use which is considered rude in Japan. Reisinger and Turner's conclusion suggests that differences in rules of behaviour (e.g. feeling display), and cultural values (e.g. family/competence) determine Asian tourist satisfaction.

## **2.20 Japanese Tourism in New Zealand**

Japan currently remains New Zealand's largest source of Asian visitor, and our fourth largest market overall. In the year to December 2005 Japanese tourism contributed NZ \$512 million to the New Zealand economy. However, while overall Japan's outbound travel is increasing, New Zealand's share of these arrivals have been in decline over the past three years (NZTB 2006). This is despite New Zealand rising from ninth to seventh place worldwide as the most desired destination for Japanese travellers (JTB 2005). There are several factors accounting for the desire to travel to NZ not being realised. The state of the Japanese economy, the distance from NZ to Japan, exchange rate relativity and other external factors are hindering Japanese travel to NZ. While these factors are beyond our control, NZ can influence our tourism offering, and the promotion of that offering to ensure we continue to appeal to and attract the Japanese tourist.

According to NZTB, Japanese travellers are becoming more independent in their decision making, group participants are looking for more free time, there is more demand for self-drive, and customers are looking to slow down and relax their travel style. However, the group tour market is still considerable in size and has good future growth potential (NZTB Market

Forum 2006). The current target markets for the NZ Tourism Board are: the silver market (60+), baby boomers (55+) and SWAF (smart working affluent females 25-40).

According to Tourism NZ's perception research, pre-visit Japanese see NZ as agricultural and slightly boring. Post-visit they feel invigorated, surprised at the seasons in NZ, and perceive it as a place to recharge. They also reported feelings of accomplishment and freedom. Overall, Tourism NZ believes the country does not have a strong, unique, appealing proposition that overcomes rational arguments against it. NZ's perception in Japan is limited to 'looking at nature', 'too rural' and with no famous landmarks. They have identified an opportunity for NZ to focus on the emotional needs of potential travellers – to promise unique and appealing experiences and emotions that are different from those gained in other countries. NZTB are currently focussing on promoting NZ as an 'Energising Natural Environment', creating a more lively, active and energetic image for the country (NZTB 2006).

Clearly however, in order to tailor our tourism offering and our promotion of that offering to appeal to the Japanese market, an understanding of the values influencing tourism is vital to New Zealand's success as a destination.

## **2.21 Conclusion**

There has been extensive literature published on Japanese tourists, some based on generalised observations and others on empirical studies. What emerges is a relatively consistent picture: Japanese travellers are looking for destinations that offer natural beauty, safety and culture. They enjoy scenery, shopping, cuisine, and sightseeing but are not particularly active tourists. Escape, relaxation and time with family are the major benefits sought from overseas travel. Package tours remain a popular form of travel, especially among the older segments, and the length of stay is relatively short. Age seems to be a defining factor in travel characteristics in relation to travel companions, spending, activities and motivational needs. Service expectations are high, and language, time and expense appear to be the greatest restraints on travel. Two studies have specifically examined cultural aspects of Japanese travel behaviour but neither explicitly consider the role of cultural values.

The nature of the research to date is mainly descriptive and empirical in nature and does not explore the more fundamental relationship between Japanese cultural values and tourist

behaviour. “While travel-related behaviour was influenced largely by cultural values, past research into Japanese tourists is mainly descriptive and a fuller understanding of their values and behaviour is necessary” (Chon, Inagaki and Ohashi 2000:182). The “systematic theoretical linkage between Japanese travel behaviour and Japanese cultural values” was identified in a list of seven specific areas called on for further research by Chon et.al. (2000:182). Given the huge importance of culture to the marketing of tourism products and services, and the importance of the Japanese market to New Zealand tourism, an understanding of the influence of culture on the behaviour and travel decisions of Japanese tourists is vital.

## **Chapter Three – Conceptualising Culture, Values and Consumer Behaviour**

### **Part One – Culture**

#### **3.1 Introduction**

The literature reviewed in this section begins with a definition of culture and consideration of the link between culture, needs and values, in order to establish values as a construct to operationalise culture. It considers the role of culture in cross-cultural marketing, particularly in a tourism context. Models of culture based on value orientations, such as the work of Kluckhohn and Strodtbeck, Hofstede, and Schwartz are reviewed. Finally this section summarises the literature related to Japanese culture, questioning ideas of Japanese cultural uniqueness and critiquing current Western conceptualisation of Japanese culture.

#### **3.2 Defining Culture**

One of the fundamental problems encountered in studying culture is defining exactly what culture is. Boon (1973) terms it a ‘fruitful paradox’; “As a concept it is both complex and ephemeral, therefore continuously controversial, yet tenacious to a degree which suggests it is indispensable. For all these reasons “culture’ is difficult to talk about and impossible to agree upon, which is how it should be” (Boon 1973:14).

The term culture was derived from the Latin *cultura*, which stems from *cloere*, meaning to tend or maintain (Williams 1981). Originally it was associated with the cultivation of animals and crops; but later also to the cultivation of mind and manners (i.e. to be cultured), and to improvements within society as a whole (becoming synonymous with civilization) (Williams 1981). One of the original scientific definitions, regarded as the point of departure for current usage, was E. B. Tylor’s 1871 definition of culture as “that complex whole which includes knowledge, belief, art, morals, law, custom, and any other capabilities and habits acquired by man as a member of society”(Tylor 1974:17).

In 1952, Kroeber and Kluckhohn synthesised the literature on culture and found 164 definitions of it. They identified six main understandings of the concept;

- Descriptive definitions see culture as a comprehensive totality making up the sum of social life
- Historical definitions see culture as a heritage which is passed through generations over time
- Normative definitions suggest culture as a rule or way of life that shapes behaviour
- Psychological definitions emphasise culture's role as a device allowing people to communicate, learn and fulfil needs
- Structural definitions highlight the fact that culture is an abstraction of isolable aspects, i.e. that one could list the things culture is
- Genetic definitions explain culture as arising from human interaction and continuing to exist through transmission

Based on their research they suggested the following comprehensive definition:

culture consists of patterns, explicit and implicit, of and for behaviour acquired and transmitted by symbols constituting the distinctive achievement of human groups, including their embodiments in artefacts; the essential core of culture consists of tradition (i.e. historically derived and selected) ideas and especially their attached values; culture systems may on the one hand, be considered as products of action, on the other as conditioning elements of further action (Kroeber and Kluckhohn 1952:35).

The history of the word has resulted in three popular uses: to refer to the intellectual, spiritual, and aesthetic development of an individual, group or society; to capture a range of intellectual and artistic activities and their products; and to designate the entire way of life, activities, beliefs, and customs of a people, group or society (Williams 1981). Although various definitions of culture have emphasised different aspects of the concept, all definitions seem to share the common themes that culture is adaptive (that is, it develops in response to the physical and social environment and issues with which a particular group must deal), shared, and learnt through socialisation (McCarty 1994). In recent usage culture is commonly used to refer to the entire way of life of a society, its values, practices, institutions, symbols, rituals, artefacts and human relationships (Harrison and Huntington 2000). In the social sciences it is widely accepted that culture is a powerful force shaping people's perceptions, dispositions, and behaviours (Steenkamp 2001).

### 3.3 Conceptualising Culture, Needs and Values

This thesis focuses on the functional/adaptive view of culture which links culture to basic human needs. As early humans, the satisfaction of basic biological needs such as security and reproduction required co-operation. Groups developed rules, roles, values, artefacts, institutions and behaviours that helped them maintain these co-operative systems, and as these systems became more complicated, so the rules became more complicated, and ultimately new ‘needs’ related to the maintenance of the system developed. This system is culture (Hanson 1975, Malinowski 1961). The functional view of culture stems from the work of Malinowski (1961) and is the basis of the work of Maslow (1954), Rokeach (1973) and Schwartz (1992). According to the functionalist view, culture develops within a certain ecological environment, its adoption is selective and adaptive; therefore cognitive schemas vary across cultures and its members develop different ways of viewing and perceiving the world. Culture is what a group learns over a period of time as that group solves its problems of survival in the external environment, and its problem of internal integration (Schein 1990).

Needs can be defined as an internal state of disequilibrium or deficiency which has the capacity to trigger a behavioural response (Steers and Porter 1991). Needs motivate action and are experienced both physiologically (at the sub-cortical level) and as cognitive representations. Values are the conscious, cognitive representations of needs, as they developed within a given world-view or culture (Rokeach 1973). Values are defined by Malinowski (1961) as the “strong and inevitable attachment of the organism to certain objectives, norms or persons who are instrumental to the satisfaction of the organism’s needs” (1961:138). While needs and motives exist on both biological and cognitive levels, values are exclusively a product of consciousness (Locke 1991). The immediate function of values then is to give expression to human needs and to guide action. While human needs are considered to be fundamentally the same (Maslow 1954, Rokeach 1973), how we satisfy these needs differs culturally; therefore so do our values. Values are unique to individuals, however at a higher level of aggregation members of the same culture are likely to share similar values acquired in the process of socialization. These values represent the acceptable modes of conduct and end states of existence of a particular culture. Thus not only are values directly linked to an understanding of behaviour across cultures, but they are also a gateway to an understanding of the more deeply held and less explicit fundamentals of culture.

### 3.4 Operationalising Culture through Values

The comprehensive and all embracing nature of culture is also its greatest downfall as a construct, “if culture includes everything, it explains nothing” (Harrison and Huntington 2000). According to the functional definition, culture is not an independent variable; it is influenced by numerous other factors, such as, geography and climate, politics, religion and history. It is difficult to deal with intellectually because there are problems of definition and measurement, and because cause and effect relationships between culture and other variables run in both directions (Harrison and Huntington 2000). The very concept of culture poses a gigantic paradox; on the one hand it is by definition particularistic – the set of values or practices of a group. But on the other hand, there can be no justification of cultural values and/or practices than by reference to some presumably universal criteria (Wallerstein 1991). To claim that culture can explain behaviour and then use variations in behaviour to define cultural differences is a tautology (Hanson 1975, Jahoda 1984, Rohner 1984). “To say that culture is a real thing which determines individual behaviour and shapes its own development is to be guilty of the fallacy of reifying an abstraction and endowing it with causal influence over the very thing from which it was originally abstracted” (Hanson 1975:2). The problem of studying culture is compounded by the fact that both researchers and researched are embedded in their own culture beliefs, thus the assessment of culture is often biased by ethnocentrism (Clark 1990).

Beyond the problems of defining culture, there is the issue of the logic of comparison. It is argued that cultures can not be compared as it is a culture’s very uniqueness that makes it a culture at all. Phenomenologists and cultural relativists insist on the uniqueness of each culture and the impossibility of constructing useful cross-cultural categories. They view the similarities in behaviour as superficial, and feel comparative methods will obscure the diversity of meaning that defines a particular culture (Sherry 1986). At the other extreme, some argue that cultures are only superficially different representations of one human culture (Rohner 1984).

Because of its amorphous nature, culture can only be used to analyse human behaviour if it is broken down into specific aspects (Brislin 2000). That is, it is necessary to extract some key elements of culture and propose that they can explain behavioural aspects. One of the most common and widely accepted key elements of culture, often used in its definition, are values (Luna and Gupta 2001, Straub, Loch, Evaristo, Karahanna and Srite’s 2002). Identifying and



describing cultures as a set of value patterns has a long history. Parsons and Shils (1951), and Kroeber and Kluckhohn (1952), include values as a core concept in their definitions of culture. Triandis's definition of subjective culture includes "the perceptions of rules and group norms, roles, and values" (1972:4). Values also underlie the definition of culture proposed by Hofstede (1991). In the 1990's the 'shared values' perspective was advanced by numerous researchers (Erez and Earley 1993, Srnka 2004, Trompenaars 1993). Erez and Earley (1993), define culture as "the core values and beliefs of individuals within a society formed in complex knowledge systems during childhood and reinforced throughout life". Others define values as the socially learnt vehicles by which culture is transmitted through generations (McIntyre 1994, Rose and Shoham 2000). The link between culture and values has widely been accepted in psychology, anthropology, sociology and marketing (Chan and Rossiter 1997, Munson 1984, Zavalloni 1980).

An important consideration in using values to operationalise culture is the level of analysis - culture on the one hand being a group level phenomenon, and values, on the other, an individual level construct. This thesis rests on the premise that while culture is a group level phenomenon, it can only manifest itself through the individual. There is no way to query or probe into the collective values of an entire culture, and it is argued, therefore, that the individual unit of analysis is both appropriate and meaningful. Cultural value priorities cannot be observed directly but can be inferred from individual values averaged across members of a society (Schwartz 1992). Individual values are partly a product of shared culture and partly a product of unique individual experience, thus averaged values of societal members can point to cultural values.

### **3.5 The Role of Culture in Cross-Cultural Marketing Research**

Cross-cultural research is interested in the nature and scope of human diversity, and in reasons underlying such diversity; it is also interested in documenting universals (Berry, Poortinga and Pandey 1997). Cross-cultural research is interested in testing the limits of theories by extending them to other cultures; failure to generalise should be explored in an effort to discover interesting variations of behaviour that may then be folded back into the theory that guided the research in the first place. Cross-cultural research need not be comparative; it is also interested in the forms of behaviour within one specific culture (other than the researchers' own) and how these relate to other forms of behaviour within that culture (Berry et al. 1997). In order for consumer behaviour research to deepen and advance, the validity of

models developed in one culture must be examined in other cultures in order for theories to be extended (van Raaij 1978). In this way cross-cultural research allows for verification of the universality of a theory. Consumer researchers need to identify elements of theory that are culture-sensitive and the impact of culture on theory and measurement in consumer behaviour provides a wide arena for research (Malhotra and McCort 2001).

The purpose of research in cross-cultural marketing is also to identify and explain similarities and differences in marketing phenomena across nations. “The manner in which people consume, the priority of needs and wants they attempt to satisfy, and the manner in which they satisfy them are functions of their culture...” (Onkvisit and Shaw 1994: 339). The study of differences in consumer behaviour across nations can help solve the controversy over the degree to which marketing elements should be standardized globally or adapted to specific cultural/national markets (the standardization vs. adaptation debate) (Buatsi 1986, Levitt 1983, Soehl and Picard 1986).

### **3.5.1 The Role of Culture in Tourism Research**

The influence of culture on leisure travel preferences has not been paid much attention in tourism research (Pizam 1999, Reisinger 2005). “It appears that there is very little knowledge among academics and marketers of the influence of national culture on travel choices” (Reisinger 2005:195). However, the examination of cultural differences is especially relevant to the tourism industry. The international nature of the industry means expectations regarding accommodation and other tourist facilities are increasingly standardized; however, distinctive differences and characteristics of the host culture are key to a destination’s attractiveness. “Successful international tourism segmentation, targeting, positioning and customisation strategies require an understanding of national cultures of tourists from various countries and regions” (Reisinger 2005: 195). Despite the importance of culture, concerns have been raised regarding both the quantity and rigor of research in this area (Dimanche 1994, Lenartowicz and Kendall 1999, Reisinger 2005). (Section 2.12 offers a review of the extant literature)

### **3.6 Models of Culture**

One of the earliest models of culture was Parsons and Shils 1951 model of value orientations. Parsons and Shils defined and categorised cultures according to five fundamental value orientations: Self Orientation vs. Collectivity Orientation; Affectivity vs Affective Neutrality (the extent to which it is acceptable for individuals to experience immediate gratification);

Universalism vs. Particularism (adherence to standard rules vs. situation specifics); Ascription vs. Achievement (judgement of individuals by attributes or actions); and Specificity vs. Diffuseness (degree to which relations among actors and objects are limited).

In a similar style, Florence Kluckhohn and Fred Strodtbeck (1961) constructed a model of culture based on five value-orientations. They set out to operationalise a theoretical approach to the values concept developed by Florence's husband Clyde Kluckhohn who defined a value-orientation as;

those value elements which are a) general, b) organized, and c) include existential judgments. A value-orientation is a set of linked propositions embracing value and existential elements....Since value elements and existential premises are almost inextricably blended in the overall picture of experience that characterize an individual or group, it seems well to call this overall view a "value orientation," symbolizing the fact that the affective-cognitive (orientation) elements are blended. More formally, a value-orientation may be defined as a generalized and organized conception, influencing behavior, of nature, of man's place in it, of man's relation to man, and of the desirable and nondesirable as they relate to man-environment and interhuman relations. Like values, they vary on a continuum from the explicit to the implicit (C. Kluckhohn 1951: 409, 411).

Kluckhohn's theory, called a theory of variation in value orientations, had the aim of providing a basis for the systematic analysis of cross-cultural differences and intra-cultural variations in basic values, and was developed to analyse the effects of basic systems of meaning (basic values) on human behaviour (Kluckhohn and Strodtbeck 1961).

The three basic assumptions underlying Kluckhohn's theory were that:

- There are a limited number of common human problems for which all peoples must at all times find some solution
- While there is variability in solutions of all the problems, it is neither limitless nor random but is variable within a range of possible solutions
- All alternatives of all solutions are present in all societies at all times but are differentially preferred

Kluckhohn suggested five basic types of problems to be solved by every society, and three alternative solutions to each:

- What is the nature of human nature – 'good', 'bad' or a 'mixture'?

- What is the relationship between humanity and its natural environment – ‘mastery’, ‘submission’ or ‘harmony’
- On what aspect of time should we primarily focus – ‘past’, ‘present’ or ‘future’?
- What is the prime motivation for behaviour - to express one's self (‘Being’), to grow (‘Being-in-becoming’), or to achieve (‘Doing’)?
- How should individuals relate with others - hierarchically (‘Lineal’), as equals (‘Collateral’), or according to their individual merit (‘Individualism’)?

Kluckhohn and Strodtbeck (1961) proposed a means of measuring these orientations. The survey they developed consisted of twenty-two general life situations designed to elicit the respondent's value orientations to the five basic problems. They tested the instrument with small rural communities in the USA, drawing samples from five different cultural groups – Texan, Mormon, Hispanic, Zuni and Navaho. Kluckhohn and Strodtbeck presented a series of short stories with alternative outcomes to respondents, who indicated their preferred alternative of the three presented for each situation. Kluckhohn and Strodtbeck developed the instrument with the intention that it be sufficiently trans-cultural to be applicable to many cultures. While Kluckhohn's theory was regarded as etic, the measurement instrument designed to operationalise it was emic.

Inkeles and Levinson (1969), proposed three dimensions of culture 1) relation to authority, 2) conceptions of self, 3) primary dilemmas or conflicts and how they are addressed. These items were derived on the basis that they appear to be universally occurring and phenomenologically real. Inkeles and Levinson's work was concerned with the extent patterned conditions of life in a particular society gave rise to certain distinctive patterns in the personalities of its members.

### **3.6.1 Hofstede**

Within the business research domain the most cited author on issues of culture and cultural characteristics is Hofstede (1980). Using a personality centered approach, Hofstede compared the individual-level values of people working for the global company IBM in forty countries, and identified four cultural dimensions on which nationalities differed; the four dimensions were entitled, power distance, uncertainty avoidance, individualism/collectivism, and masculinity/femininity. Power distance can be defined as “the extent to which less powerful members of a society accept and expect that power is distributed unequally” (de Mooij 2004: 33). High power distance countries believe in authority, supervision and hierarchy; that is,

they encourage or maintain power or status differences between people. The seniority system dictates respect for age and wisdom, and subordination to those of higher social position. In contrast, low power distance countries believe that social hierarchy and inequality should be minimized. In high uncertainty avoidance cultures people avoid conflict, competition and risk-taking. On the other hand, lower uncertainty avoidance cultures tolerate ambiguity, new ideas and different behaviours. In cultures of strong uncertainty avoidance there is a need for rules and formality to structure life (de Mooji 2004). Collectivist cultures foster the development of strong cohesive groups and focus on group needs. Individual preferences are sacrificed for the harmony of the group and decisions are based on group consensus to avoid conflict. In contrast, individualistic nations are concerned with individual needs and goals. Masculine societies make a sharp division between the roles of men and women and the focus is on performance and growth. In contrast, feminine societies focus on quality of life, the welfare of others and allow the sexes to take different roles. “The dominant values in a masculine society are achievement and success, the dominant values in a feminine society are caring for others and quality of life” (de Mooji 2004:34).

A fifth dimension to Hofstede’s model was discovered by Michael Bond (1988) based on work in China. The resulting dimension refers to a long-term versus short-term orientation in life. Consequences of a long-term orientation are an acceptance of change, perseverance, thrift, and pursuit of peace of mind.

Hofstede’s dimensions are widely used as independent variables for comparative cross-cultural studies and have led to many explanations of cross-cultural differences in consumer and organizational behaviour. Hofstede’s work has however been criticized on the grounds that the scores were collected in the late 1960’s/early 1970’s and may no longer be applicable. Hofstede’s sample, limited to research in one particular sample of IBM employees, has also been criticised. In some cases the items used by Hofstede are clearly linked to particular work related values and may not be reflective of more general life values. For example one of the uncertainty avoidance items assesses an individual’s propensity to leave his/her job within a several year period, and it is not clear that turnover intentions actually measure uncertainty avoidance (Erez and Earley 1993). Another criticism raised has been whether or not the dimensions are applicable in all cultures (Erez and Earley 1993).

### 3.6.1.1 Individualism/Collectivism

Of Hofstede's four dimensions, individualism/collectivism (I/C) is the major dimension used in marketing research to compare cultures, and specifically to compare East and West.

According to Triandis;

Perhaps the most important dimension of cultural difference in social behaviour, across the diverse cultures of the world, is the relative emphasis on individualism v. collectivism. In individualist cultures, most people's social behaviour is largely determined by personal goals, attitudes, and values of collectivities (families, co-workers, fellow countrymen). In collectivist cultures, most people's social behaviour is largely determined by goals, attitudes, and values that are shared with some collectivity (group of persons) (Triandis 1988: 60).

The dimension of individualism-collectivism is not a new concept in social theory. Its evolution can be traced back at least as far as 19th century classical sociology, when Tonnies (1887) proposed the distinction between *Gesellschaft* (society developed through complementary, self-interested exchange), and *Gemeinschaft* (community nurtured through shared, group-oriented kinship or tradition). Later, Durkheim (1930) noted the existence of two distinctly different forms of social cohesion: mechanical solidarity, based on the complementary satisfaction of shared interests; and organic solidarity, based on the collective satisfaction of shared interests. In a similar tone, Weber (1947) observed the presence of both voluntary, temporary interpersonal relationships motivated by self-interested gain; and more permanent group relationships supported by traditions fostering a sense of joint obligation. The distinction between individualism and collectivism was introduced to contemporary theorists by Parsons and Shils (1951), whose dimension of self vs. collective orientation was based on the work of Weber (Berry et al. 1997, Erez and Earley 1993).

Based on Hui's 1984 survey of forty-nine academic colleagues (Triandis 1988: 89), an agreed definition of collectivism was established;

1. Consideration of the implications of one's behaviour for others
2. Sharing of material and non-material resources
3. Emphasis of within-in-group harmony
4. Emphasis on shame rather than guilt as a control behaviour
5. The sharing of both good and bad outcomes with others
6. Feeling that one is part of an in-group's life

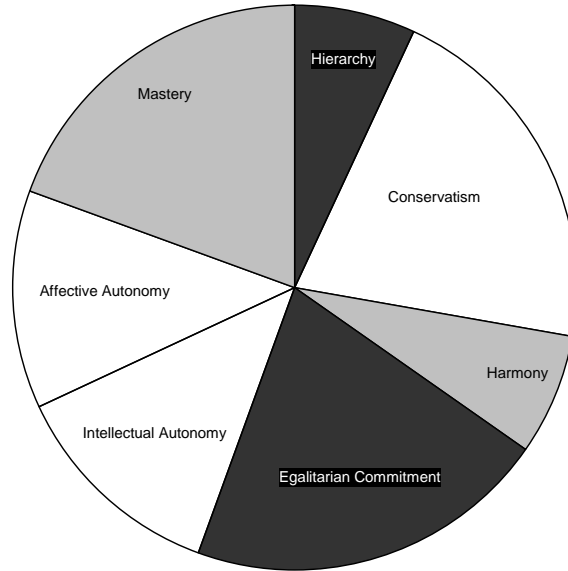
Although the I/C dimension dominates current theoretical and measurement efforts in much of the consumer behaviour literature, it continues to generate controversy (for example, see the special issue of *Psychological Bulletin* Jan 2002), and both Hofstede's work and the I/C dimensions in general have been criticised (Voronov and Singer 2002). For example, some authors have suggested that the construct might be too broad (Schwartz and Bilsky 1990), or that I/C proponents have overreached in relating I/C to so many ecological, cultural, and social behaviours (Kagitcibasi 1997). In addition, the vast majority of I/C studies have been conducted in the US and a limited number of East Asian countries (particularly China and Japan), thus I/C might be unduly based on a restricted range of cultures (Kagitcibasi 1997). In a 1999 study Grimm, Church and Katigbak looked at individualist and collectivist values in the US and Philippines and found cultural differences to be only modestly to moderately predictable from I/C theory. They concluded: "We do think that our results add to a legitimate concern about the limited evidence for the replicability and cross-cultural generalisability of existing I/C measures", and call for a "significant clarification of I/C theory" (Grimm et.al. 1999:17).

### **3.6.2 Schwartz**

Psychologist Shalom Schwartz conducted a value study with eighty-six samples of school teachers and college students from forty-one cultural groups in thirty-eight nations between 1988 and 1992 (Schwartz 1994). Schwartz's later work extended this study to include over 200 samples from more than sixty nations (Schwartz, Melech, Lehmann, Burgess, Harris and Owens 2001). Schwartz created a set of fifty-six value questions derived from the literature, and respondents were asked to rate each value for importance as a 'guiding principle in their own life'. Based on value items rated on a nine point Likert scale, Schwartz identified ten distinctive individual-level value dimensions and seven culture-level dimensions. The culture-level dimensions include: hierarchy (social power, authority, influence, humility and self-enhancement), conservatism (obedience, social order, family security), harmony (world at peace, social justice, helpful, world of beauty), egalitarian commitment (social justice, responsibility, loyalty, honesty, equality and freedom), intellectual autonomy (curiosity, creativity, broadmindedness), affective autonomy (varied life, stimulating activities, exciting life), and mastery (daring, capable, success, ambition, independence, self-direction).

**Figure 1**Schwartz's Culture Level Value Structure

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As shown in Figure One the seven cultural level values reveal three bipolar dimensions – conservatism vs. autonomy; hierarchy vs. egalitarianism; and mastery vs. harmony. Schwartz proposed these dimensions as the three basic concerns of all societies – how individuals relate to the group; how people consider the welfare of others, and; the relationship between people and their natural and social world. (See section 2.10.3 for a discussion of Schwartz's individual level value domains)



**Table 2**

## Overview of Cultural Value Models

Emerging Domains	Parsons and Shils (1951)	Kluckhohn and Strodtbeck (1961)	Inkeles and Levinson (1969)	Hofstede (1980)	Schwartz (1994)
Relation to Gratification	Affectivity vs. Affective neutrality				
Relation to Human Relationships	Self vs. Collectivity	Linearity/ Collaterality/ Individualism	Conceptions of self	Collectivism vs. Individualism	Conservatism vs. Autonomy
Relation to Situations	Universalism vs. Particularism				
Relation to Action	Ascription vs. Achievement				
Relation to Roles/Activity	Specificity vs. Diffuseness	Being/ Being-in-becoming/ Doing		Masculinity/ Femininity	
Relation to Nature		Subjugation/ Harmony/ Mastery			Mastery vs. Harmony
Relation to Human Nature		Good/Evil/Neutral			
Relation to Time		Past/Present/Future			
Relation to Conflict/Risk			Primary dilemmas or conflicts	Uncertainty avoidance	
Relation to Authority			Relation to authority	Power distance	Hierarchy vs. Egalitarianism

### 3.7 Conceptualising Japanese Culture

There has been an extensive amount of literature published analysing, explaining and comparing aspects of Japanese culture with ‘the West’, often describing Japanese culture as unique and inherently different from the rest of the world. Essentially Japanese culture has been defined in terms of dichotomous differences with ‘the West’. It has been characterised as a vertical, hierarchical society; and concepts such as *wa* (harmony), groupism, and Hofstede’s collectivism, have been used to explain numerous behavioural traits of Japanese people. By emphasising uniqueness, many studies of Japan have contributed to creating and reproducing stereotypes of the Japanese national character and culture.

#### 3.7.1 Japanese Cultural Uniqueness?

Richie (2001) summarises the interpretations of Japanese culture from the 18th century on. Early paradigms defined Japan in opposition to the West, in terms of dualistic anomalies and

paradoxes, and during the 20th Century in terms of harmonised contrasts (i.e. old and new, Japanese and Western). From about 1975 on, according to Richie, the dominant paradigm became ‘uniqueness’ and an extensive body of literature, written by both Japanese and non-Japanese emerged, supporting a theory of the unique aspects of what it was to be Japanese – *nihonjinron* theories. While theorising about the nature of one’s culture is not limited to Japan, the *nihonjinron* genre has become almost an obsession for the Japanese (Horne 1998). Most of this *nihonjinron* literature identifies one aspect of Japanese culture or personality – collectivism, *amae*, *wa*, the *ie* system, or even biological characteristics – and uses this to define what it is to be Japanese.

Similarly, Befu (1997) takes an interesting look at the history of ‘defining Japan’ (*nihonjinron*) and believes the Japanese have long been intent on distinguishing themselves from their significant referent nation of the time – in early times China, and more recently the U.S. He relates the changing sense of identity of Japanese people to the political history of Japan, including its opening to the West and WW II. Periods of political strength and unity were characterised by a strong sense of nationalism and ethnocentrism, while defeat was followed by the devaluation of traditional values and the resulting comparisons with the West. “...discourse on Japan’s identity in the late 1940’s and the 1950’s became one of comparing Japan with the West as Japan’s way of convincing itself how wrong it was – a way of providing a rationale for the lost status of the wartime ideology” (Befu 1997: 24). Since the growth of Japan’s economy and its emergence as a world power Befu believes *nihonjinron* theory has returned to a more positive, even ethnocentric discourse. In the business literature for example, ‘unique’ characteristics of Japan’s management style (‘Just In Time’) and corporate structure (*Keiretsu*) have been used to explain Japan’s economic success (Yang 1995).

According to *nihonjinron* theory Japan has been characterised in opposition to the West as:

**Table 3**

Japan vs West according to *Nihonjinron* (Henshall 1999:173, based on Dale 1988)

West	Japan
Mixed races	Racial purity
Individualism	Groupism, contextualism
Horizontal	Verticality
Contract (keiyaku)	Kintract (enyaku)
Private	Public
Guilt	Shame
Rights	Duties
Independence	Dependence
Inner-directed	Outer-directed
Intolerant	Tolerant
Logical, either/or	Ambivalent, both/and
Rational	Emotional
Objective	Subjective
Rigid principle	Situational ethic
Universality	Particularity, uniqueness
Heterogeneity	Homogeneity
Absolutism	Relativism
Rupture	Harmony, continuity
Donative	Receptive
Active	Reactive

Henshall (1999) summarises the flaws of *nihonjinron* literature as being “over-simplification, exaggeration, stereotyping, unsupported claims, leaps in argument and logic, ignorance of actual facts, and the use of selective data to prop up assumptions” (1999: 171). Much of the literature summarised herein, especially that related to Japanese travel behaviour, is clearly reflective of the theory of Japanese uniqueness, and the relevant marketing literature especially is still largely limited and defined by this paradigm.

According to the marketing literature Japanese culture is, in relative terms, one of the most homogeneous in the world (Reisinger and Turner 1998, Synodinos 2001). According to this literature, Japanese share a common language, the same socio-cultural values, cultural heritage and national origin; in comparison to Western nationalities, which often are aggregates of the world’s various cultures (Ahmed and Krohn 1992). Japan’s homogeneity as a consumer group has been linked to its island isolation, the control of mass media, the uniform education system, and small income differentials (Synodinos 2001). However it has been argued in the discipline of Japanese studies that Japan’s ‘homogeneity’ is also a myth, and merely another claim to ‘uniqueness’ that ignores the reality of three million *Burakumin*

(Japan's 'outcasts'), one million Japanese-born Koreans, the Ainu and Okinawan people, and many other Japanese of Chinese or other foreign ancestry (Kamishima 1990, van Wolferen 1989).

### 3.7.2 Criticisms of Western Conceptualisations of Japanese Culture

According to Hofstede's research, the Japanese are very strong on the uncertainty avoidance dimension, meaning they avoid conflict, competition and risk-taking. Japan also scored highest of all the countries included in the study on the masculine extreme of the masculine/feminine dimension (Hofstede 1980). Japanese society was slightly towards the high end of the power distance dimension and Hofstede also classified Japanese society as collectivist. Thus among the nations studied, Japan stands out as high in uncertainty avoidance and masculinity, and, in comparison to the US, also high on collectivism and power distance according to Hofstede's conceptualization. Although Japan was not, in relative terms, extremely high on Hofstede's collectivism dimension, it is this dimension that has been used to characterise the culture; and it is collectivism that is commonly used in business research as an explanation for various aspects of Japanese consumer behaviour.

Esyun Hamaguchi (1985) offers a powerful argument against using Western paradigms to conceptualise Japanese society and compare it to other cultures. Criticising the fact that Japan has been defined in contrast to an 'individualistic' paradigm, and an *a priori* assumption of the I/C structure, he instead offers an alternative methodological model for Japanese studies. He believes scholars have tended to look for analytical paradigms by which to analyse Japan from those developed for either Europe or America, and calls these 'paradigms of methodological individualism'. He cautions that;

when applied to Japan, these methodological approaches naturally leave a number of phenomena that can not be satisfactorily explained. To overcome this deficiency, researchers felt it necessary to provide concepts and/or theories deemed unique to Japan to supplement the universal concepts or general theories of Western origin. Examples of this trend are the theories of 'shame culture', 'vertical society' and 'amae'. Unfortunately, however, because the basic paradigms were Western in origin, the researchers failed to grasp Japanese traits from an emic position. They also unconditionally adopted such basic categories as 'the individual', 'the group' or 'personality' as cornerstones for their theoretical frameworks without realizing that all these categories are culture bound. Methodological individualism was adopted widely as the analytical paradigm for Japan studies even though it has its foundations in the emics of Euro-American societies. It is inevitable that analyses based on this kind of methodology will be biased in some way or other when it comes to the recognition of 'Japanese' traits (1985: 291).

He defines ‘methodological individualism’ as a paradigm in which autonomous ‘individuals’ are assumed to be the fundamental form of human existence, and society (group) is placed in contrast. He believes this type of research has been based on the assumption of the *a priori* existence of this dualistic structure, and states “It is an error in logic to apply a collectivist model to a society in which an individualistic model is not applicable” (1985: 296). Hamaguchi believes in order to investigate the organising principle of Japanese society, one has to conceptualise Japanese collectivism in different terms.

Each culture forms a subjective definition of human existence and this determines the definitions of relations between the self and others. Hamaguchi (1985) uses the example of the idiomatic usage of the Japanese language as strong evidence that the Japanese think of man in his relationships with others. In Japanese the same word, *hito* (man), can mean both self and others, and *ningen* 人間 (human), is written with the characters ‘people’ and ‘between’ (Yamazaki 1994). According to Hamaguchi (1985:301) “Such divergences in meaning would be inconceivable to Euro-Americans who conceptually distinguish society from the individuals that are its components”. In contrast, he believes Japanese selfness (*jibun*) is not a constant like the ego but a fluid concept, which changes through time and situations according to interpersonal relationships. Based on this he proposes the use of the term *kanjin* 間人 (a reverse of the characters for *ningen*), or ‘contextual’ to conceptually distinguish the Japanese actor from the ‘individual’ (*kojin*). He believes Japanese relationships are based not on dependence upon others, but interdependence. For this interdependence to be maintained, desires of the self (*jibun*) cannot be selfishly satisfied, and the social system must incessantly demand self-restraint. His article presents a model of the Japanese as ‘contextuals’ participating in (*aidagara*) relationships, and advocates a theoretical groundwork for analysing the characteristics of Japan’s society and culture on the basis of its emics. Hamaguchi redefines individualism/contextualism: “Individualism can be characterised by a) ego-centeredness, b) self reliance, and c) regard of interpersonal relations as a means to an end. Contextualism can be characterised by a) mutual dependence, b) mutual reliance, and c) regard for interpersonal relations as an ends to themselves” (1994: 318).

According to Yamazaki (1994), contextualists value interdependence and mutual trust, they “consider the relationship between the self and others to be the essence of human existence”

(1994: 134). Yamazaki argues that individualism is not particular to the West, and also argues against the very idea of individualism in its pure sense, as every individual's life is affected by those they interact with. What differs between Japan and the West is that Japan, in its world-view, and reflected in its language, accepts interaction (contextualism) as the natural state of human existence; while the West sees the individual as the natural state of human existence and is therefore faced with a dichotomy between 'individual' and 'group'. Contextualism asserts "that the contextual is a truer form of existence than the individual and that theoretically, as well, it better explains the relationship between society and its parts" (Yamazaki 1994:136). Yamazaki (1994) suggests the concept of the 'contextual' has also been theorised by Western writers (Arthur Koestler's *holon*, and Simmel's theory on socialising), and is not a uniquely Japanese phenomenon. Hayashi and Kirada (1997), based on a forty year study (conducted every five years) of Japanese values in a comparative perspective, conclude that the key differences between the Americans and the Japanese are not related to differences in individual vs. group orientation but center on two more fundamental dimensions: the definition of self (i.e. understanding of self in interaction), and the definition of the world.

Markus and Kitayama (1991) investigated the concept of interdependence and describe two divergent construals of self – independent (individualist) and interdependent (contextualist), and discuss how these divergent views of the self have an influence on cognition, emotion and motivation. For the interdependent self, "self-in-relation-to-other" is the focal individual experience. Actions are more situationally bound and expression and experience of emotion governed by the consideration of others' reactions. They believe

The notion of an interdependent self is linked with a monistic philosophical tradition in which the person is thought to be of the same substance as the rest of nature.... Thus persons are only parts that when separated from the larger social whole cannot be fully understood. Such a holistic view is in opposition to the Cartesian, dualistic tradition that characterises Western thinking and in which the self is separated from the object and from the natural world (1991: 227).

Thus, the normative imperative of Western culture is to become independent from others and to discover and express one's unique attributes, while the normative philosophy of interdependent cultures is to maintain this interdependence among individuals. Individuals are not separated from the social context, and are seen as connected to and less differentiated from others. "People are motivated to find a way to fit in with relevant others, to fulfil and

create obligation, and in general to become part of various interpersonal relationships” (Markus and Kitayama 1991: 227). This translates into a concern for belongingness, reliance, dependency, empathy, occupying one’s proper place, and reciprocity. Markus and Kitayama go as far as to argue that:

Even within highly individualistic Western culture, most people are still much less self-reliant, self-contained, or self-sufficient than the prevailing cultural ideology suggests that they should be. Perhaps Western models of the self are quite at odds with actual individual social behaviour and should be reformulated to reflect the substantial interdependence that characterises even Western individualists (Markus and Kitayama 1991: 247).

NB: The literature relating to Japanese culture and tourism behaviour is reviewed in section 4.19.

### **3.8 Conclusion**

The concept of culture is notoriously difficult to define and operationalise. Despite the importance of culture to marketing practices, and particularly the marketing of tourism products and services, there is a lack of literature looking at the influence of culture on tourism behaviour. This thesis adopts a functional view of culture and is interested in investigating the link between culture, needs, values and behaviour. Values are seen as providing a vehicle to operationalise culture and understand its influence on consumer behaviour. This chapter reviews models of culture from the 1950’s to the more recent work of Hofstede and Schwartz. The individualism/collectivism dimension, made popular through Hofstede’s work, is the most widely used dimension of culture used to explain cross cultural differences in consumer behaviour. Japanese culture has been defined by the I/C paradigm and by notions of uniqueness and homogeneity. The literature on Japanese consumer behaviour and business strategy focuses on the ‘differences’ stemming from the I/C distinction. However the I/C distinction has been widely criticised by Japanese scholars as not being applicable to Japanese culture which does not make such a distinction itself. The I/C distinction is an imposed Western empirical model that tells us nothing about *why* these differences exist, or *how* the experiences in a ‘collectivist’ culture understand their experience. I/C is seen as the ‘cause’ of cultural difference rather than one aspect of more fundamental differences between Japan and West European culture, arising from religion, culture, world-view, and self concept.

The literature reviewed in this chapter supports the notion that values are a fundamental element of culture and can be operationalised to understand behaviour. This thesis thus proposes an investigation of values, rather than cultural dimensions such as I/C, as a method of understanding the relationship between Japanese culture and the behaviour of Japanese tourists in New Zealand. The next section looks in more detail at values link to behaviour and reviews the extant literature in this area.

## **Part Two - Values and Consumer Behaviour**

### **3.9 Introduction**

The second part of this chapter focusses on defining values and summarises the literature on values use in consumer behaviour, particularly in the tourism literature. The four value scales most commonly applied in consumer behaviour are reviewed, with particular focus on the List of Values employed in the quantitative phase of the research.

#### **3.10 Defining Values**

Human values are defined as desirable goals, varying in importance, that serve as guiding principals in people's lives (Kluckhohn 1951, Rokeach 1973, Schwartz 1992). The most cited definition is that of Rokeach (1973:5), who defined values as "an enduring belief that a specific mode of conduct or end state of existence is personally or socially preferable to alternative modes of conduct or end states of existence". A later conceptual definition of values was set out by Schwartz and Bilsky (1990), they defined the five formal features of values as:

- 1 Concepts or beliefs
- 2 About desirable end-states or behaviours,
- 3 That transcend specific situations,
- 4 Guide selection or evaluation of behaviour and events, and
- 5 Are ordered by relative importance.

Values are regarded as the most central, abstract beliefs that guide attitudes and behaviours (Lawson, Tidwell, Rainbird, Loudon, Della Bitta 1996, Rokeach 1973). Behaviours, attitudes, and values are interconnected in a hierarchical network with values being the basic beliefs most stable over time. Rokeach (1973) contended that values may be more useful than



attitudes in understanding human behaviour as they are more central to an individual's cognitive system. Values are not tied to any specific object or situation, but they form the basis for more situationally specific attitudes and are consequently a causal influence on behaviour. "Values transcend specific objects and situations...work at a higher level of abstraction and are deeper seated, more pervasive influences on behaviour than attitudes" (Lawson et al. 1996:81).

### **3.11 Values and Consumer Behaviour**

Znaniecki (1918) is credited with being the first individual to introduce to the social sciences the notion that values could be approached empirically to study culture (Zavalloni 1980). Social anthropologists later gave a prominent place to the study of values as part of a comparative science of culture, believing it was through values that the cultural determinants of behaviour could be studied (Zavanolli 1980). While the study of values emerged in the 1930's in the fields of psychology, anthropology and sociology, it was not until the late 1970's that consumer behaviour related value research in marketing began (Chan and Rossiter 1997, Munson 1984).

The concept of human values and value systems has been widely used by social scientists to explain a variety of behavioural phenomena, such as charity contributions (Manzer and Miller 1978); mass media usage (Becker and Conner 1981); religious behaviour (Feather 1984); cigarette smoking (Grube, Weir, Getzlaf and Rokeach 1984; Lavack and Kropp 2003a); drug addiction (Toler 1975); political inclination (Rokeach 1973); organization behaviour (Munson and Posner 1980); cross cultural differences (Munson and McIntyre 1979, Schwartz and Bilsky 1987); management styles (Lenartowicz and Johnson 2003); drinking behaviour (Kropp, Lavack and Holden 1999); cause related marketing (Kropp, Holden and Lavack 1999; Lavack and Kropp 2003b); and ethics (Nonis and Swift 2001; Rallapalli, Vitell and Szeinbach 2000).

In the context of marketing, values are commonly regarded as the most deeply rooted, abstract formulations of how and why consumers behave as they do. According to Brangule-Vlagsma, Pieters and Wedel (2002:267) "Personal values are relatively distal but nevertheless powerful determinants of consumer behaviour". Personal values have been shown to be efficient, measurable sets of variables that are less numerous, more centrally held, and more closely

related to motivations than demographic and psychographic measures (Madrigal and Kahle 1994). Values are standards, from which beliefs, attitudes and consequently behaviours are formulated. In this sense, individuals demonstrate their values and life style choices through the acquisition of products and services (Lages and Fernandes 2004). It is believed that “if market segments can be profiled and understood in terms of personal values, then efforts to attract, appeal to, influence, and satisfy consumers can be designed around basic psychological needs” (Muller 1995:4).

Walter Henry’s 1976 study was one of the first to look specifically at the relationship between values and consumer behaviour. He found empirical evidence “to support the general theory that culture is a determinant of certain aspects of consumer behaviour” (1976:121). His study investigated the link between values and choice criteria in the automotive industry, and his findings indicated different value orientations among American consumers resulted in different choice criteria for car purchases.

In 1977 Vinson, Scott and Lamont conducted a study with subjects from two culturally distinct regions of the USA using the Rokeach Value Survey (see section 2.10.1). They proposed that values could be investigated at three mutually dependent levels of abstraction – global values, domain specific values and evaluations of product attributes. They investigated the link between consumption related values, the importance of ten automobile attributes, ten consumer products and services, and fifteen current social issues. Their results indicated that groups had significantly different value orientations, and that, global values, consumption-related values, evaluation of product attributes, and preference for consumer products or services were related in a logically structured manner. They concluded that “knowledge of consumer value orientations provides an efficient, measurable set of variables closely related to needs which expand the marketers’ knowledge beyond demographic and psychographic differences” (1977:48).

Since these early studies, researchers using various value scales have examined a wide range of consumption questions such as choice of recreation activities (Beatty, Kahle, Homer and Misra 1985), health food purchases (Homer and Kahle 1988), brand choice (Dibley and Baker 2001), travel information sources (Fall 2000), tourism segments (Gountas, Carey, and Oppenheim 2000), consumer susceptibility to interpersonal influence (Kropp, Lavack and Silvera 2005), consumer choice (Manyiwa and Crawford 2002), accommodation and activity

choices (Thyne and Lawson 2000) and found significant relationships between values and consumer behaviour. Values have also been widely used in marketing research as an attractive basis for market segmentation because of their relative stability.

### **3.11.1 Values and Tourism Behaviour**

*Value theory would predict that a consumer's free choice of destination or experiences, the travel or destination attributes that are important to the tourist, and the sources of pleasure or memorability arising from a visit to a foreign city are all modes of expression for a person's value priorities (Muller 1991:4).*

Due to the importance of the tourism industry to N.Z.'s economy and employment opportunities and the intense competition currently facing both N.Z as a destination and individual tourism operators, it has become even more crucial to understand tourists' underlying reasons for their choices. "To market travel services and destinations well, there must be a degree of understanding about the motivating factors that lead to travel decisions and consumption behaviour" (Gee 1984:431). According to Kim and Lee (2000) there is potentially great variation among different cultures in terms of their values, travel behaviour, preferences, and motivation.

Knowledge of the personal values of individuals who engage in particular behaviour as opposed to those who do not may provide for an understanding of the cognitive link between what the individual feels is important in life and what is evidenced by the behaviour. Thus, the building of 'value profiles' to differentiate between those who engage in specific leisure/travel behaviour versus those who do not may provide vital information about the needs of patrons. Marketing emphasis on the ability of the leisure/travel behaviour to satisfy value-based needs should build repeat behaviour as well as provide a basis for marketing to individuals with similar value profiles. In addition, examination of the value profiles of non-visitors can provide an indication of those needs that the attraction is not perceived to satisfy and may provide useful data for future marketing strategies (2000:21).

Within the domain of international travel, values have been used to enhance the understanding of segments based on other market variables (e.g. Muller 1991, Pitts and Woodside 1984) and as the primary variable for segmentation (e.g. Madrigal and Kahle 1994, McCleary and Choi 1999). One of the earliest papers looking at values and travel behavior was Vinson and Munson's 1976 study. They found that segments which attached the greatest importance to the values 'an exciting life' and 'pleasure' were more likely to be interested in travel. Boote's 1981 study of values and restaurant choice, one of the first in the hospitality literature,

indicated that the market could be meaningfully segmented on values but not on the basis of traditional demographic variables.

Pitts and Woodside (1986), studied the relationship between personal values and recreation/travel activity criteria using Rokeach's Value Survey. Respondents were segmented according to the benefits they sought from these activities and discriminant analysis was used to identify the values relevant to each segment. They found that group membership and behaviour (i.e. visitation to tourist attractions) differed according to the dominant personal values of segment members, thus establishing support for values as a useful tool in segmenting the travel market. Muller's (1988) study looked at cultural amenities and also found values to be useful in predicting the importance people attached to different cultural amenities. For example those who valued cultural amenities such as museums, ballet, opera, theatre and orchestra, also placed high importance on the values of self-respect, warm relationships with others, a sense of belonging and being well respected. Kahle et al. (1988) found that fine dining was related to the values of excitement and fun and enjoyment in life.

Muller's 1991 study segmented visitors to Toronto on the basis of the importance they attached to various city attributes; participants were then asked to rate the importance of the nine LOV items. Muller found that these benefit segments had distinctive value orientations. One segment was found to value security, a sense of belonging and being well respected; this segment was looking for the fun and excitement of travel but required the destination to be safe, familiar and friendly. Segment two valued fun and enjoyment and excitement more than other segments and were seeking night life, restaurants and sensory stimulation. Segment three most highly valued self-respect, warm relationships with others, a sense of accomplishment and self-fulfillment and were seeking intellectual stimulation through contact with local people, culture and language. Muller found that the segments were not significantly different with regards to demographic variables.

Madrigal and Kahle (1994) adopted the opposite approach to Muller (1991) and examined whether segments based on personal value systems differed on the importance ratings of vacation activities. They reduced the nine LOV items to four domains using factor analysis and used these 'value system' domains as the basis for segmentation. Using value domains as the independent variable they hypothesised that tourists with different value-systems would

differ in their importance ratings of Scandinavian vacation activities. A multi analysis of variance (MANOVA)<sup>2</sup> revealed significant differences existed among the value-system segments on activity factors. The study also indicated that value system segmentation explained a greater number of differences in activity preference than demographics did. Madrigal and Kahle concluded that tourism destination marketers should consider visitors' personal values when segmenting markets, and that knowledge of personal values provides an indication of the motives and needs satisfied by a destination. "It appears personal values may be an important set of variables to be considered in predicting what lures tourists to a destination" (Madrigal and Kahle 1994:27).

McCleary and Choi (1999), examined values as a segmentation tool cross-culturally in the hospitality industry, using samples from the U.S and Korea. Respondents were asked to rate the Rokeach Value Survey and the importance of various attributes used in hotel selection on a five point Likert scale. Hierarchical cluster analysis was used to identify groups of respondents with similar value structures based on their scores on the RVS. Firstly, they found that there were significant differences between the value systems of the two cultures. Secondly, distinct segments could be identified based on differences in value ratings, and these segments significantly differed on the majority of hotel choice criteria. They then used a stepwise multiple discriminant analysis to determine the ability of personal values to correctly classify respondents into their own cultural group based on their RVS scores – correct classification was 86.4%. They concluded, "this study found that consumers of the same product, in the same buying situation in two different cultures, have different purchase criteria that can be related to different personal values....Values may provide a better understanding of market behaviour and a better base for developing cross-cultural marketing strategy than other segmenting methods" (1999:15).

Kim and Lee (2000), sought to explain how cultural characteristics play a role in creating distinctive differences in tourist motivation, looking specifically at the differences in individualism/collectivism between Anglo-American and Japanese tourists. On five factors derived from the I/C measure, Japanese had higher means for 'family integrity' and 'social interdependence', while Americans were higher on 'self-reliance', 'separation from in-groups' and 'emotional detachment'. A MANOVA comparing the I/C factors with five travel

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<sup>2</sup> Statistical technique used to determine differences between groups on two or more dependent variables

motivation factors showed Japanese placed more importance on ‘family togetherness’ and ‘prestige/status’, while Americans placed more importance on ‘novelty’.

Thyne and Lawson (2000) used Means-End laddering to investigate the links between values and accommodation and activity choices in N.Z, using the nine LOV items plus some additional values from RVS. Their research showed that while respondents sometimes had different value-based motivations for choosing the same type of accommodation or participating in similar activities, they were often fulfilling the same values.

Despite the long history of values research, several authors have noted the current limitations of values research in tourism. Kim and Lee (2000:154) state “regrettably, there has been a lack of study which attempts to directly measure cultural characteristics and explain how these cultural characteristics play a role in creating distinctive differences in tourist motivation”. According to You, O’Leary, Morrison and Hong (2000) it remains to be addressed in tourism research whether travelers from varying cultural backgrounds seek different travel benefits and have different preferences for travel products and services, and the extent they are similar in their travel behaviours. Muller (1991:6) cautions “the literature on tourism and values supports the notion that the desirable aspects of touristic experiences and key destination criteria are determined by personal values. But how this mechanism works has not been adequately explored – in particular, identifying the specific set of value orientations that modulate touristic impressions, emotions, and behavioural intentions”.

### **3.12 Measurement of Values**

Although there have been numerous value scales proposed and tested, four dominate the social science literature – Rokeach’s Value Survey (RVS); The Lifestyles and Value Survey (VALS); Schwartz’s Value Survey (SVS); and the List of Values (LOV).

#### **3.12.1 Rokeach Value Survey (1973)**

Milton Rokeach’s definition of individual values is one of the most cited definitions in this field and he has perhaps been the most influential of all authors on the subject of values (Lawson et al.1996, Puohiniem 1995). Rokeach’s theory and measurement of values were based on five assumptions, that: 1) the total number of values that a person possesses is relatively small 2) all men everywhere possess the same values to different degrees 3) values

are organised into value systems 4) the antecedents of human values can be traced to culture, society and its institutions and personality 5) the consequences of human values will be manifested in virtually all phenomena that social scientists might consider worth investigating and understanding (1973:3). Rokeach differentiated between *terminal values* which are concerned with end states of existence, such as ‘a world at peace’, ‘a comfortable life’; and *instrumental values* which are concerned with modes of conduct, such as ‘ambitious’ and ‘honest’ (Rokeach 1973). His original study linked values to all kinds of attitudes and behaviour including: civil rights, attitudes to the poor, international affairs, religion, consumer behaviour (detergent and car preferences), the Vietnam War, and the choice of academic pursuits. Rokeach created the RVS consisting of two sets of values, respondents are asked to rank both the eighteen terminal and eighteen instrumental values in order of importance as guiding principles in their lives. The RVS was considered an easy scale to apply, and it was validated among the general population (Rokeach 1973).

Some of the major criticisms of Rokeach’s survey instrument center around the comprehensiveness of the thirty-six values, the distinction made between terminal and instrumental values, and the ranking method used (Puohiniem 1995). The RVS has also been criticized because of the difficulty and time required in ranking so many items, the impossibility of ties, and the lack of relevance of some of the values to everyday life (Madrigal and Kahle 1994). In terms of its application to consumer behaviour, Madrigal and Kahle believe “it is too general and includes some values that have too little to do with consumption” (1996:84). The relevance of some of the value items in other cultures and therefore its applicability for use cross-culturally has also been questioned (Zavalloni 1980).

### **3.12.2 Values And Life-Style Survey (1983)**

The Values And Life-Style Survey was developed at SRI International by Mitchell in 1983. Based on the work of Maslow (1954), and the concept of social character, the survey uses attitude statements and demographics to classify people into one of nine lifestyle segments. After a decade of research VALS2 was created which identifies eight different lifestyle segments. VALS was developed for commercial application and the algorithm is proprietary; therefore it is rarely used as an alternative value measure in academic studies (Beatty, Homer and Kahle 1988, Kahle 1986b, Novak and MacEvoy 1990).

### 3.12.3 Schwartz Value Survey (1992)

Recently the most extensive research project on values was that carried out by psychologist Shalom Schwartz (see also section 2.5.2). Using the statistical technique of ‘smallest space analysis’, Schwartz (1992) reduced his original fifty-six values to ten dimensions and identified a circular structure of relations among them, supporting the idea of a universal theory of value content and structure (Schwartz 2001). The primary individual values in each space were arranged so that values correlating highly with each other were positioned adjacent to each other and opposite from values that are inversely correlated. The ten dimensions were – self direction; universalism; benevolence; conformity; tradition; security; power; achievement; hedonism; stimulation. These ten values are considered by Schwartz to represent universal aspects of human existence, which are rooted in basic individual needs. According to Schwartz, while countries differ on the emphasis/importance of value dimensions, the structure of these values does not change (see Figure Two).

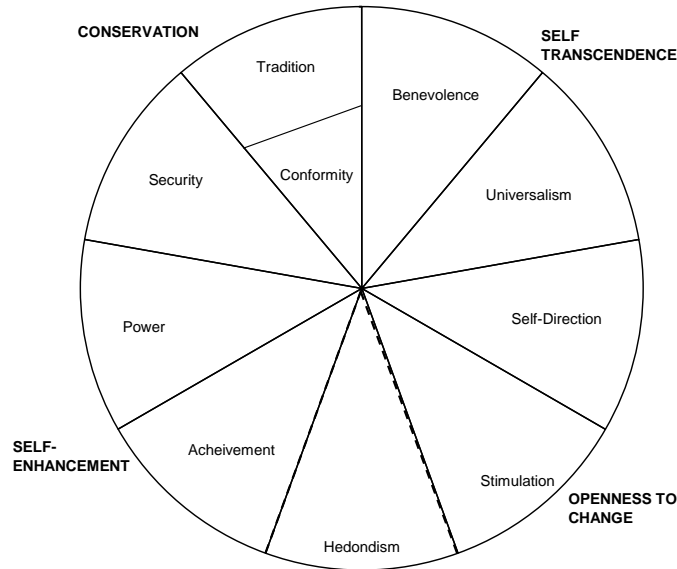
According to Lawson et.al. (1996:87) “there are high levels of consistency in Schwartz’s results, which suggests we may be able to identify a number of core values with a common structure that can be measured across very different cultures”. The great advancement of SVS over RVS was the shift from rankings to ratings allowing for greater depth of analysis.

Schwartz later developed the Portrait Value Questionnaire as an alternative to the SVS. It was designed as a more concrete and less cognitively complex measurement instrument for use in populations not familiar with abstract context-free thinking. The PVQ includes short verbal portraits describing a person’s goals, aspirations or wishes that point to the importance of a value. Respondents are asked to compare the portrait to themselves; responses range from ‘very much like me’ to ‘not at all like me’.



**Figure 2**

## Schwartz's Individual Level Value Structure



Schwartz's Value Survey is often considered too large and time consuming for respondents in a consumer behaviour context, and some applications of it in a cross-cultural context have resulted in questions about the equivalence of some items across cultures (Boulaneour 2005, Holdsworth 2003, Struch, Schwartz and van der Kloot 2002). Of Schwartz's original fifty-six values only forty-five have 'nearly equivalent' meanings across cultures; the following values did not: social recognition, intelligent, self-respect, inner harmony, true friendship, a spiritual life, mature love, meaning in life, detachment, sense of belonging and healthy (Struch, Schwartz and van der Kloot 2002).

Schwartz's Value Survey may offer the most comprehensive and theoretically sound alternative to the survey approach to values measurement. However, several of the value items have been shown to lack cross-cultural equivalence and thus the scale can not be used to compare individual values across cultures or investigate the link between specific values and behaviour across cultures. The SVS measures abstract values and Schwartz has suggested that cross-cultural studies with values embedded in concrete context should be pursued (Schwartz and Bilsky 1990). As Schwartz (1995:110) has noted "interpretations based in SSA (smallest space analysis) locations are tentative. They require grounding in knowledge about the culture from other sources". While Schwartz did include emic values in his research he

concluded that none of these emic values constituted a new value domain and thus they were removed from further application. However, despite not representing a new value domain it is possible that these specific emic values may be highly important in certain contexts.

#### **3.12.4 List of Values (1983)**

Developed at the University of Michigan Survey Research Center, the List of Values is based on the theoretical contributions of Maslow (1954), Rokeach (1973) and Feather (1975). Initiated by the work of Veroff, Douvan and Kulka (1981) it was further developed by Lynn Kahle (1983) to address the limitations of the RVS and provide a more parsimonious measurement of personal values. The original study involved face to face interviews with a probability sample as part of a study on modern living, and in part, replicated and extended data from a book entitled 'Americans view their mental health'. Thus it was originally related to measures of mental health, well-being, and adaptation to society, roles and self (Kahle 1983). The values were selected because of their applicability to life's major roles. The LOV was first used in America with 2264 adult respondents (Kahle and Kennedy 1988).

The nine values (Self-Respect, Being Well Respected, Warm Relationships with Others, A Sense of Belonging, Fun and Enjoyment in Life, Excitement, Self-Fulfillment, A Sense of Accomplishment, Security) are derived from Rokeach's list of terminal values; however only 'a sense of accomplishment' and 'self-respect' are identical to the RVS. The others combine two or more of Rokeach's values to form more abstract values (security instead of family security and national security; being well respected instead of respect and admiration).

Originally, respondents were asked to identify their first and second most important values from the list but the ranking and/or rating of all nine values has also been used (Kahle et.al. 1986b, Kahle 1996). Kahle (1983) justified the original decision to use the two most important values by referring to Rokeach, who found that respondents ranked their most extreme values more reliably than their middle values, and knew more about their central than their peripheral values.

### **3.13 List Of Values Research**

Subsequent research has confirmed the reliability and validity of the LOV (Beatty, Kahle, Homer & Misra 1985), and applied it to many contexts, including opinion leadership (Rose, Shoham and Kahle 1994), gift-giving (Beatty et al. 1993), conformity in dress (Rose, Shoham,

Kahle & Batra 1994), advertising preferences (Kennedy, Best and Kahle 1987) and sports participation (Shoham, Rose, Kropp and Kahle 1997)

The LOV scale has exhibited validity comparable to RVS while offering greater parsimony. LOV has also been found to provide a higher percentage of items that respondents said influenced their lives (Beatty, Homer, Kahle and Misra 1985). It offers the advantage of greater ease of administration and completion over RVS and SVS (Beatty et.al. 1985, Kahle, Beatty and Homer 1986). The LOV is also considered more easily translatable, and related more closely to daily life and consumer behaviour (Novak and MacEvoy 1990). “LOV may be better for establishing important relationships between values and consumption and may relate more closely to the values of life’s major roles” (Lawson et.al. 1996:84). Beatty et.al. (1985) showed desirability bias<sup>3</sup> was also lower than for RVS. Other advantages over the RVS are that while the RVS is limited to ordinal data analysis, LOV variables can be measured using interval level data.

In a study of students at Michigan University Kahle, Beatty and Homer (1986), included the LOV scale, the VALS scale, various demographics and consumer behaviour questions and found “that LOV significantly predicts consumer behaviour trends more often than does the VALS scoring system” (1986:409). However the results of further comparisons are contradictory; Novak and MacEvoy (1990) believe when demographics are removed VALS may be preferred over LOV as a segmentation basis.

According to Madrigal and Kahle (1994) value domains represent higher order groupings of single values and are more consistent with the conceptual theory that values are hierarchically ordered and that conflict between values is resolved by a value’s relative priority to conflicting values. They also believe value domains are a more effective and reliable measure than single values. While they recognized that most of the previous segmentation research used the original items as the basis for segmentation, theoretical support was found for the notion that the LOV items may be better represented at a more abstract level by value domains. Kahle (1983) found theoretical and empirical evidence for internal and external dimensions to the LOV items. Internally oriented individuals (those who valued fun and enjoyment, self-fulfilment, excitement, a sense of accomplishment, and self-respect) want

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<sup>3</sup> Bias caused by respondents tendency to give what they believe to be the normative or socially desirable answer

more control over all aspects of their lives; in contrast, those people who rate the external values (sense of belonging, being well respected and security) are more inclined to let fate control their lives. Chan and Rossiter (1997) also agreed that the LOV items could be divided into internal and external orientations and believed consumers with an internal locus of control are much more individualistic, while those with an external locus of control will be more concerned with their social group and its approval.

Homer and Kahle (1988) identified three empirical dimensions to the LOV in a study of values and food shopping behaviour: factor one – labeled internal, included self fulfillment, excitement, sense of accomplishment, and self-respect; factor two – external, included sense of belonging, being well respected and security; and factor three – interpersonal, included fun and enjoyment in life and warm relationships with others. At a theoretical level Madrigal and Kahle (1994) suggested the original values may represent internal (self-respect, self fulfillment, sense of accomplishment); external (sense of belonging, being well respected, security); and hedonic domains (excitement, fun and enjoyment in life). The empirical data revealed four dimensions labeled external (sense of belonging, being well respected, security); enjoyment/excitement (fun and enjoyment in life, excitement); achievement (sense of accomplishment, self-fulfillment); and egocentrism (self-respect, warm relationships with others). They noted that the underlying structure of the factors may be contextual and therefore the factor loadings may vary slightly from one situation to the next.

**Table 4****LOV Research Applications**

<b>Study</b>	<b>Application Area</b>
Beatty, Kahle, Homer and Misra (1985)	Media preference, leisure
Beatty, Kahle and Homer (1991)	Gift giving, culture* (US and Oriental cultures)
Beatty, Kahle, Utsey and Keown (1993)	Gift giving, culture* (US and Japan)
Boush et al (1993)	Cynicism
Grunert and Scherlorn (1990)	Consumer Values* (West Germany and North America)
Homer and Kahle (1988)	Natural Food Shoppers
Kahle (1983)	Mental health, roles
Kahle (1986)	Geographic segmentation
Kahle, Beatty and Homer (1986)	Segmentation
Kahle, Beatty and Homer (1989)	Norwegian consumers
Kahle, Liu & Watkins (1991)	Geographic variation
Kahle, Poulos & Sukhdial (1988)	Social trends
Kahle and Shoham (1995)	Role-relaxed consumers
Kennedy, Best & Kahle (1987)	Car-ad positioning
Kropp et al (1992)	Pet Owners
Madrigal and Kahle (1994)	Vacation activity
Mueller, Kahle & Cheron (1992)	Demand forecasts
Rose et al (1994)	Conformity and dress
Rose, Shoham and Kahle (1994)	Opinion leadership
Shoham, Kropp, Rose & Kahle (1998)	Risky sports consumption and sensation seeking
Weeks, Chonka & Kahle (1989)	Sales force annual sales
Weeks and Kahle (1990)	Salespeople's effort
Goldsmith, Freiden and Kilsheimer (1993)	Female Fashion Leadership*
Wedel, ter Hofstede and Steenkamp (1998)	Segmentation*
Daghfous, Petrof and Pons (1999)	Values and Adoption of Innovations: A Cross-Cultural Study*
Kropp, Jones, Rose, Shoham, Florental and Cho (2000)	Group Identity and group influence *
Rose and Shoham (2000)	Values of American and Japanese Mothers *
Kim, Forsythe, Gu and Moon (2002)	Apparel Purchases*
Brunso, Scholderer, Grunert (2003)	Food-Related lifestyle*
Kropp, Lavack and Silvera (2005)	Values, Collective self-esteem and consumer susceptibility to interpersonal influence*

\*cross-cultural studies

### 3.13.1 The LOV in a Cross-Cultural Context

As Table Four indicates the LOV has been employed widely in a cross-cultural context, particularly in the past six years. In 2000 Kahle published a book entitled 'Cross-National Consumer Psychographics', noting in the introduction that "a strong need exists for a widely accepted instrument for the cross-national and cross-cultural comparison of values. To the extent that international and cross-cultural research can focus on one instrument, multiple studies will become comparable and provide converging information about values" (2000:3). He suggests the LOV is one viable candidate for this role. However, contrary to Kahle's suggestion and the wide use of the LOV as a values measure in cross-cultural consumer behaviour research, there have been three studies in particular that have raised the issue of its validity in this context.

Beatty, Kahle, Utsey and Keown (1993) examined gift-giving behaviours in the US and Japan and found the dominant value for Japanese respondents was self-fulfillment. The relatively low rating found for 'a sense of belonging' was questioned by the authors as it was anticipated this value would be highly important. Native speakers said the Japanese

translation could be interpreted as ‘feelings of belonging or ties to others’, however they felt that this had a somewhat negative connotation because of the strong emphasis on status in Japanese culture - with belongings and ties come obligations, and control by higher status individuals. Beatty et al. (1993) concluded: “the scales utilized (LOV) are highly ethnocentric...and may not adequately represent the values of Eastern societies” (1993:63).

Another issue raised in relation to the LOV is the conceptual similarity between several of the value items. Beatty and Talpade (1989) asked respondents to describe the nine values in their own words. While five of the values had consistent synonyms, four items did not. In addition, the items: ‘sense of belonging’ and ‘warm relationships’; ‘fun and enjoyment’ and ‘excitement’; ‘sense of accomplishment’ and ‘self fulfilment’; and ‘sense of accomplishment’ and ‘being well respected’ showed considerable conceptual overlap. Grunert and Scherhorn (1990) found similar results when examining the correlations between value items in their application of the LOV in Germany. Their results also suggest the connotations linked with the values differ from country to country. Grunert and Scherhorn (1990) also found a different factor structure to that proposed by Homer and Kahle (1988) in an application of the LOV in German (GLOV) and suggest the differences found between importance ratings and factor structure in the US and Germany were of a substantial as well as semantic nature. They conclude that “the results from a first use of the GLOV suggest that, at a first stage, differences in semantic meanings of values should be explained thoroughly and clarified before one could go on into further interpretation of substantial value differences or draw implications for researchers and practitioners” (1990:106).

Grunert, Grunert and Kristensen (1994) specifically test the invariance of the LOV in four countries (USA, Denmark, Germany and France) using confirmatory factor analysis. Neither the variance-covariance matrices, nor the mean values were identical across the samples, thus they reject the hypothesis that the LOV measured culturally identical cognitive value structures in these samples. They conclude:

The results of our analyses suggest that the cross-cultural validity of LOV seems to be rather doubtful. If an instrument developed in one culture, i.e. USA, and used in this same culture, where the same language is spoken, not even meets the minimum requirement for meaningful comparisons when comparing several samples, from that culture then it is doubtful whether it can be employed in cross-cultural studies [sic] (1994:1).

Despite these findings, many researchers continue to use the LOV for cross-cultural research (Brunso, Scholderer, Grunert 2003, Daghfous, Petrof and Pons 1999, Kahle 2000, Kim, Forsythe, Gu and Moon 2002, Kropp, Lavack and Silvera 2005, Kropp, Jones, Rose, Shoham, Florenthal and Cho 2000, Rose and Shoham 2000, Wedel, ter Hofstede and Steenkamp 1998). Kahle (2000) has suggested the LOV is a viable candidate for the role of a widely accepted instrument for the cross-cultural comparison of values. In specific calls for research Kahle (2000) has suggested the following questions be determined with reference to the LOV cross-culturally:

- Additional research to confirm or disconfirm current findings related to the LOV
- Emic studies in one or more nations outside of the US to assess the meaning and nuances of specific values to specific people.
- The specific relationship of values to attitudes and behaviours across nations.

This research is intended to address these questions, and to test the validity of the LOV as a measure of values in the context of Japanese tourism behaviour.

### **3.13.2 LOV In Japan**

To the author's knowledge four studies using the LOV in Japan have been published. Beatty, Kahle, Utsey and Keown (1993) used the LOV to investigate gift-giving behaviours in the US and Japan. They note early in their introduction that although the LOV had previously been used in cross-cultural research, "its Western creation and bias suggests that Eastern values may not be fully captured" (Beatty et al. 1993). They used a ranking approach to the nine LOV items, and the sample employed was parents of college students. The number one value selected by individuals was used to form value segments. The dominant value for Americans was self-respect, while for the Japanese respondents it was self-fulfillment (followed by warm relationships with others). Expressing surprise with their results in Japan, given expectations of its collectivist orientation, the authors reviewed their translation of the LOV and reported;

for some terms, such as security and self-fulfillment, there are no exact translations into Japanese. They (native speakers) felt that our translations might not convey exactly what we intended but that no Japanese word or phrase existed that would better represent our meanings. Self-fulfillment could be roughly translated as 'I feel like I did my best and I am satisfied' and it tends to have a more spiritual (and less materialistic) meaning than it does in the United States. Security was translated as 'sense of relief' or 'free from worry' (1993:56).

Soutar, Grainger and Hedges (1999) used the LOV in Australia and Japan to investigate stereotypes. Respondents from each culture were asked to complete the LOV for themselves and as they perceived the other country. Findings suggested more disagreement about Japanese national cultural values between Japanese and Australian respondents than about Australian values, suggesting this created the potential for misunderstanding between the two cultures. On the use of the LOV cross-culturally they concluded that “international business researchers could make more use of this instrument in future research given its brevity, ease of use, ease of translation, and the research evidence of its having been successfully employed in a variety of intercultural setting” (1999:7). Soutar et.al. suggest the LOV scale is more transferable than other value scales across cultures since it contains no specifically Western-oriented concepts and that it is effective in differentiating cultures.

Rose and Shoham (2000), surveyed mothers of children aged three to eight using the LOV in Japan and the US as part of a study on consumer socialization. Respondents were asked to rate the values on a five point Likert scale. Results indicated that American and Japanese mothers differed significantly on the ratings of all items in the List of Values except excitement. Respondents were asked to select their two most and second most important values – 65% of Japanese respondents chose fun and enjoyment, 44% security, 25% accomplishment and 24% warm relationships with others. Americans, in order of importance, selected self-respect, warm relationships with others, and security. A follow up focus group was used to assess the meanings and connotations of the nine values. Based on this qualitative research the authors concluded that most value connotations were similar to those held by Americans though there were some differences noted. In their conclusion they note the importance of individual as well as interpersonal values in Japan and the increasing importance of self-oriented values for younger Japanese; however they caution that these individual values are interpreted in a group-oriented context. “These findings represent an intriguing contrast to the view of Japan as a monolithic culture, and illustrate the blending and inherent dualism of Japanese society” (2000:58). Rose and Shoham invite future research on a more representative sample in Japan and an examination of cohort effects on values.

Lotz, Shim and Gehrt (2003) used the LOV in Japan to investigate consumer cognitive hierarchies in formal and informal gift-giving situations. However, they added to the nine original values six other items to reflect Japanese-specific values, thus suggesting the LOV did not adequately capture the necessary relevant values. The values added were: harmony



with others; self-discipline; achieving identity through affiliation with peers; living up to a position or status in life; fulfilling duties in an honourable manner; and family relationships.

The results of these applications vary widely and indicate conflict about the applicability of the LOV in Japan.

### **3.14 Conclusion**

Values are defined as concepts or beliefs that transcend specific situations, and guide the selection or evaluation of behaviour and events. Having established in Part One the suitability of values to operationalise culture, this definition clearly provides the conceptual link between values and behaviour. The study of values has a long history in the social sciences and their application in consumer behavior research has shown significant relationships between values and consumer choice behaviour. This chapter reviews the four major scales used to measure values in the social sciences and provides a more in-depth review of the LOV, which was chosen as the scale to be applied to the research question. The LOV has been widely used in consumer behaviour research and is considered a more parsimonious alternative to Rokeach's Value Survey and Schwartz's Value Survey. Kahle (2000) has also suggested it as a viable candidate for a widely accepted instrument for the cross-national and cross-cultural comparison of values and it has been applied widely in this context. Despite Kahle's assertions, two applications of the LOV in Japan have raised some concerns as to its applicability. The next chapter will examine the logic of the cross-cultural comparison of values using value scales; and investigate the methodological problems in operationalising values as a means to understand behaviour.

## **Chapter Four – Methodological Considerations in Cross-Cultural Values Research**

### **Part One – Methodological Issues in Values Research**

#### **4.1 Introduction**

Chapter Three outlines the rationale and supporting literature for the use of values in cross-cultural research. Values have been used to operationalise culture and investigate its link to behaviour in a large number of studies in psychology, sociology, anthropology and marketing. While the link between culture, values and behaviour is well established, there have been criticisms of methodological issues in operationalising value measures. Values are by definition subjective and personal, and thus their measurement inherently difficult. This chapter examines the methodological issues affecting the application of values measures in consumer behaviour. Part One examines general methodological issues affecting value research, while Part Two highlights the additional problems raised in a cross-cultural context.

While values research in marketing has been extensive, its results have not always been conclusive. Although values have been applied to a wide range of consumer behaviours, in general these studies have shown only a modest relationship between personal values and the behaviour investigated (Chan and Rossiter 1997). Some authors have suggested that the lack of strong and consistent findings in values research indicates the relationship is a tenuous one (Chan and Rossiter 1997, Shrum, McCarty and Loeffler 1990). Shrum, McCarty and Loeffler (1990:609) state: “It has been generally assumed that values guide behaviour, although evidence of strong relationships between values and behaviour is virtually nonexistent”. However, in a later paper, McCarty and Shrum (2000) suggest that the relatively weak findings may be attributable to problems with the measurement of values, rather than an inherently weak relationship between values and behaviour.

Several authors have detailed the inherent methodological and theoretical problems with value research (Chan and Rossiter 1997, Feather 1986, Grunert, Grunert and Kristensen 1994, Hui and Triandis 1985, Leung and Bond 1989, Leung 1989, Munson 1984, Smith and Schwartz 1997, Zavalloni 1980). Firstly, values are highly abstract concepts, and therefore likely to yield judgemental, emotional and imprecise results in self-reporting value surveys (Hui and

Triandis 1985). Secondly, there is also the issue of confusing values with other related concepts - a number of studies that claim to measure values in fact measure specific attitudes and interests (Feather 1986). Further, it is critical to determine which specific value(s) may be associated with purchase and usage behaviours; and what relevant intervening attitudes must be identified in order to link consumption choice to underlying values (Munson 1984). The use of value-systems as opposed to single values as the basis for analysis is another problematic issue in values research. Although values have been assumed to be global, the relative importance of values for individuals may be situational and this has not been clarified in values research (Chan and Rossiter 1997). The following section will look at these and other issues in depth.

#### **4.2 Defining Values Research**

The abstract nature of values makes definition difficult and there appears to be confusion in the literature as to what constitutes 'values research'. In some research, values are used to refer to personal values, typically measured by inventories such as the LOV, RVS and the SVS. Other values researchers study specific values: e.g., Belk and Pollay's (1985) study on the value of materialism; or value orientations, such as the work of Kluckhohn and Strodtbeck (1961) and Hofstede (1980). Other value researchers measure values of/or toward something in particular, such as work or religion (for example Hayashi's ongoing value research in Japan [Hayashi and Kuroda 1997]).

Inkeles and Levinson (1969) believe it is not surprising to find that the term 'values' has been used with many different connotations, since empirical research on values has been conducted by people who "differ widely in disciplinary origin, in substantive theoretical interests and modes of investigation"(1969:435). In 1969 Smith stated that "the handful of major attempts to study values empirically have started from different preconceptions and have altogether failed to link together and yield a domain of cumulative knowledge" (1969:98). Zavalloni echoed this sentiment in her 1980 review of values research:

Values research has never developed a body of specific measuring techniques comparable to attitude scales, which are somewhat independent of the substantive interests of those using them. The different ways of measuring values are inextricably linked to the particular ways a researcher conceptualises the term, selects an aspect of what may be conceived of as the 'desirable', and follows a given theoretical orientation (1980:77).

This thesis refers only to personal values as defined by Rokeach, and measured by value scales such as the RVS, SVS and LOV; however the problem of defining values is further discussed in the section 8.6.

### **4.3 Situational versus Transcendental Nature of Values**

There also appears to be confusion in the literature as to the situational or transcendental nature of values. In early values research it was noted that people acquire values through experiences in specific situations or domains of activity, and that behaviour cannot be understood or effectively predicted except in the context of a specific environment (Vinson 1977). However, most definitions of values include the terms ‘global’ or ‘transcendental’. Rokeach defined values as ‘enduring beliefs’; Schwartz defined a formal feature of values as ‘transcending specific situations’; and Kahle’s LOV asks respondents for their ‘global values related to everyday life’. Kahle himself has stated in later work (Kahle, Beatty and Homer 1986), that the LOV may be ‘context specific’ – an obvious contradiction if the scale purports to measure global values.

There is little research in this area to date; however, Chan and Rossiter’s (1997) research suggests that while values are generally thought to be transcendental, this may only be true for people’s absolute value ratings, while the relative importance of values for the individual may be situational. Shrum, McCarty and Loeffler’s (1990) research suggests that when presented with survey instruments individuals may have difficulty accessing their true values and instead report attitude judgements based on the situation. Thus reported ‘values’ will be situationally specific and the importance ascribed to them contextual (Crick-Furman and Prentice 2000). There is obviously a need for more research into whether scales such as the LOV are measuring global values, or context specific values that vary according to the consumption situation in which they are employed. In a tourism context it could be hypothesised that a different set of values, rather than ‘global’ or ‘everyday life’ values may apply, especially if tourism is seen as an escape from routine and daily life (Crick-Furman and Prentice 2000).

### **4.4 Links to Other Constructs**

Early models in the consumer behaviour literature attempted to directly link cultural values with product choice. However, empirical research has not been able to fully support this view (Overby, Woodruff and Gardial 2005). While there is evidence the relationship exists, there

is a lack of theoretical explanation as to how values are related to other constructs in influencing consumer behaviour (Chan and Rossiter 1997).

In 1977 Vinson proposed a framework of global or generalised personal values; domain-specific or consumption values; and evaluations of product attributes (attitudes). However, since Vinson's study there has not been sustained research on this important distinction and the weak links found between values and behaviour may be due to the failure to define and clarify 'values' and their link to other constructs. Much research simply attempts to link personal or global values, such as the LOV and RVS, to specific consumer behaviours, missing out the links to consumption related values and attitudes. Most attempts to relate cultural values (a group construct), to consumer choice (a personal construct) are weak (Tse, Wong and Tan 1988).

Homer and Kahle (1988) empirically tested the link between values, attitudes and behaviour using the LOV. Their findings suggest that values influence behaviour both directly and indirectly through attitudes. However several researchers have questioned this simplified hierarchy and proposed other models incorporating additional intervening variables (Brunso, Scholderer and Grunert 2003, Chan and Rossiter 1997, Claxton, McIntyre, Clow and Zemanek 1997, Homer and Kahle 1988, Tse, Wong and Tan 1988). Tse, Wong and Tan (1988) proposed that consumers' perceived attribute importance ratings (termed, consumption values) provide the link between cultural values and consumer choice. Claxton et al. (1997) suggest that cognitive style is an important antecedent to consider in assessing the values – attitude – behaviour hierarchy. They present a structural equation model showing that cognitive style has an antecedent relationship to three LOV factors. Chan and Rossiter (1997) also raise the issue of antecedents, noting that values can be viewed both as an independent and a dependent variable in the study of consumer behaviour. Values are the consequence of variables such as age, education level, gender, income, culture, etc., and these antecedents may have a moderating effect on the relationship between values and consumer behaviour. Chan and Rossiter (1997) propose a model taking into account the effect of values' antecedents and adding mediating variables such as motives and social norms to the value-attitude-behaviour hierarchy.

According to Munson (1984), two of the most critical tasks when addressing the use of values in a marketing sense, are to determine which specific value(s) may be associated with

purchase and usage behaviours; and to determine the relevant intervening attitudes which must be identified in order to link consumption choice to underlying values. These questions remain unaddressed. Theoretically, it has been generally accepted that values are causally related to behaviour through attitudes (the value-attitude-behaviour hierarchy), however, it is necessary to understand where values fit into a broader social structure if they are to be useful in consumer research. As yet there is no generally accepted theory regarding the specific links between values, other cultural, socio-economic and demographic variables, and consumption.

#### **4.5 Level of Analysis**

As early as 1969, Smith noted that it was misleading to assume that general cultural values, as defined by anthropologists, are the same as personal values held by an individual (Zavanolli 1980). At the individual level, values represent the beliefs that serve as guiding principles for people's everyday lives; at the cultural level values are abstract, socially shared, normative beliefs about what is good or bad. To assume that findings obtained at one level will hold true at the other level is to commit an ecological fallacy (Smith and Schwartz 1997). A distinction can be made between aggregation errors (due to applying individual data at the population level) and disaggregation errors (due to applying population-level data to individuals) (Berry, Poortinga, Segall and Dasen 2002).

In the case of value research this can be demonstrated in the use of culture level variables such as Hofstede's dimensions being used to predict individual consumer behaviour and/or the use of Rokeach's Value Survey as an inventory for cultural values or for directly comparing cultures (de Mooij 2004, Yau 1994). Clearly a cultural value is not necessarily a personal value and thus the analysis of cultural values can not be used to predict individual behaviour. If researchers are interested in cultural values one approach is to infer these from aggregated individual level data. Survey data needs to be collected from a representative sample of individuals and then aggregated to the level of country by computing a mean score for the culture. This is the approach employed by Hofstede and Schwartz and adopted for this thesis.

#### **4.6 Value Surveys**

The survey approach to values measurement dominates consumer behaviour research (see further discussion in section 4.16), and this method of measurement raises several additional issues to those already discussed.

#### 4.6.1 Self-reporting of Values

Values are highly abstract concepts and therefore self-reporting is likely to yield imprecise results. Self reported values are subjective products of mental constructive processes, and therefore subject to various biases and errors (Peng, Nisbett and Wong 1997). Some of these potential biases include: cultural differences in constructing meaning; social comparison processes in judgements about values (i.e., people often make judgements about their own values in relation to their beliefs about others – their responses are relative ones); and deprivation based preferences (i.e., that people express stronger preferences for something they lack or believe themselves deficient in) (Peng et al. 1997). Shrum, McCarty and Loeffler (1990), hypothesised that self-reporting of values would depend on the extent to which individuals have considered their values in the past. If an individual is not adept at assessing true values, their choices may be closer to attitude judgements dependent on the situation. Their study used a measure of self-consciousness and found persuasive communication regarding a particular value prior to completing the RVS affected respondents' ratings. They conclude that true values are not easy to measure, especially via self reporting scales as these are also dependent on the extent to which the individual engages in self-reflection. Grunert, Grunert and Beatty state:

It is not immediately clear why...the ratings or rankings of values in a survey situation, as one type of behaviour expressing a value system, should be systematically related to other types of behaviour expressing the same value system, like in a buying or consuming situation. Survey research thus does not have a higher *a priori* validity than other measurement instruments. As with other approaches, the actual validity has to be demonstrated empirically (1989:36).

#### 4.6.2 Single Values versus Value Systems

Another primary issue with values scales is the reliance on single items to measure values. “Values are complex phenomena, and the use of complex measures is required. It is no more reasonable to measure the value of ‘warm relationships with others’ with a single item than it is to measure attitude toward religion with a single question on a survey” (Richins and Dawson 1992:314). People are almost never guided by just one value and thus the idea of segmenting consumers using just the top ranked variable (as was commonly done using the LOV), conflicts with the theory of a value system which has been supported by a number of researchers (McIntyre, Claxton and Jones 1994). Numerous authors have argued that research should focus on value domains as opposed to single values; however, single values are still

regularly employed in the consumer behaviour literature (Chan and Rossiter 1997, Schwartz and Bilsky 1987).

#### **4.6.3 Rating versus Ranking**

The issue of rating versus ranking in value survey research is also problematic. Although the merit of ranking vs. rating of scale items is debated in other areas of research, this issue is particularly pertinent to the study of values for two reasons: firstly the abstract nature of values, and secondly the inherently positive nature of values, which makes them difficult for respondents to differentiate among. The ranking of values overcomes the difficulty of differentiation by forcing respondents to make choices; however, it means ties are not possible. On the other hand, the rating of values often results in end piling<sup>4</sup>, making analysis difficult.

Rokeach suggested the ranking of values as most accurately capturing the aspect of choice: that is, that, values represent choices people must make in life. However there are several drawbacks to the ranking procedure: it forces distinction where there may not be one; it is difficult to administer; takes a great deal of time and energy for respondents to complete; and offers limited analysis due to the ordinal nature of the data. Rating scales on the other hand, allow greater statistical analysis; are easier to administer; simpler to complete; and allow for ties. However, the inherent positive nature of values means end-piling can limit the usefulness of the data, making it difficult to assess which values are most important to the respondent, and weakening the correlation among other variables so that these relationships remain unclear (McCarty and Shrum 2000). Rating scales are also open to response bias (see section 3.14).

Research comparing the two methods of values measurement has generally shown ranking to be superior to rating (Reynolds and Jolly 1980). However, others have suggested that the two methods are of similar validity and reliability and the decision to rank or rate should be determined by the nature of the research question (Munson and McIntyre 1979). One suggested solution to this debate is the rank-then-rate procedure; respondents are first asked to rank the values in order of importance then to go back and assign ratings to each of the values. Besides the obvious advantage of gaining the benefits of both the rating and ranking

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<sup>4</sup> The majority of responses tending to one end of the scale



procedures, the other advantage of the rank-then-rate method is that respondents first consider the whole range of values, and these comparisons remain salient when they rate the values, thereby addressing the problem of end-piling (McCarty and Shrum 2000). However, the equally obvious disadvantage is the time and effort associated with both ranking and rating the measure. The procedure is also difficult to administer as it requires complex instructions.

#### **4.6.4 The Desired versus The Desirable**

Another problem evident in value survey research is the distinction between the desired and the desirable, or real versus ideal values. The desirable signifies something which actually guides our day-to-day behaviour, while the desired signifies something one wishes to have but cannot attain given present circumstances (de Mooij 1998, Grunert and Muller 1996). Grunert and Muller (1996) studied this issue in relation to the LOV in Canada and Denmark, by explicitly distinguishing between respondent's 'day-to-day real life' and their 'ideal life' values. Results from both countries reveal significant differences between real and ideal life values, suggesting that people might attach different degrees of importance to the same set of values depending on the context in which they were making their priorities known. For example when Canadian consumers visualised an ideal life there was a strong downward shift in the importance of 'security' and a strong upward shift in the importance of 'an exciting life'.

In an ideal life Canadians do not see that they would want more security, in fact, they seem to be saying that security should not be an important value in an ideal life. Our findings tentatively suggest that researchers may have varying measurement problems when personal values are being tapped in consumer surveys and thus the conclusions they draw may be erroneous or misleading.... The general issue of values and value measurement is a complex one and does not lend itself easily to scaled responses. We urge value researchers to continue to pursue this avenue of inquiry and to explore the definitional and contextual issues of value measurement (1996:183).

In addition, people who value something do not necessarily exhibit that value. For example people may value creativity as a guiding principle in life but may not be creative. And, some who are creative may attribute little importance to creativity as a value that guides them (Schwartz et al. 2001). Schwartz addresses this issue with the recently developed PVQ instrument (see section 2.10.3) – "A respondent to the PVQ who says that a person for whom 'thinking up new ideas and being creative is important' is very much like her or him, reveals the importance she or he attributes to self-direction values, although the respondents may not

be creative” (Schwartz et al. 2001: 523). However, other value instruments fail to clarify this distinction and thus are open to multiple interpretations and misleading conclusions.

#### **4.7 Conclusion**

The issues raised in the preceding section highlight the unresolved methodological issues that threaten the validity of values research and contribute to the tenuous link found between values and consumer behaviour. There is no clear, agreed-upon definition of values and the varying conceptual approaches to the area have not been brought together to yield a domain of cumulative knowledge. The situational versus transcendental nature of values, and the level at which they are analysed is unaddressed in the majority of values research. How values are linked to other constructs, both antecedently and consequently has also not been clearly established. The self-reporting of values in surveys is subject to various sources of bias and error, making results imprecise. The issue of ranking versus rating has not been resolved, and the measurement of single item value statements is not supported in the literature. It is also not possible to assess in value surveys whether respondents are referring to desirable or desired values, nor if responses are made in relation to transcendental values, or relative to the research situation in which the values scale is presented. These unresolved issues bring into question the validity of value surveys as a reliable way of assessing values and of linking them to consumer behaviour.

## **Part Two - Methodological Issues in Cross Cultural Values Research**

#### **4.8 Introduction**

The issues discussed in Part One are generic to values research in general. However, further issues arise when values are assessed in a cross-cultural context. The past five years have seen a significant amount of work on cross-cultural methodological concerns and recent publications have highlighted these issues in management (Li and Larakowsky 2001), behavioural intention models (Malhotra and McCort 2001), organisational research (Helk, Poortinga and Verhallen 2005), service quality (Smith and Reynolds 2002), and social distance measures (Weinfurt and Moghaddam 2001). However, despite the importance of cross-cultural values research, there has been no synthesis of methodological issues in this context.

Measurement and analysis of values in a cross-cultural context add further difficulties and potential sources of bias to those already discussed. Values are abstract constructs, not easily observed, difficult to translate into different languages, and their interpretation depends on the cultural backgrounds of respondents and researchers (Reisinger and Turner 2002). The choice of technique used to measure values also creates problems; only techniques that are appropriate to the cultures that are being compared and that are equivalent across cultures can be used. Problems also concern emic versus etic approaches, ethnocentrism, and the equivalence of meanings and measures.

#### **4.9 Criticisms of Cross-Cultural Consumer Behaviour Research**

The inherent methodological problems in cross-cultural research have been dealt with widely in the cross-cultural psychology literature for decades (Berrien 1967, Berry 1969, Brislin, Lonner and Thorndike 1973, Frijda and Jahoda 1966, Malpass 1977). However, many of the issues raised in psychology remain unaddressed in cross-cultural consumer behaviour research. The tendency in consumer research has been to implicitly assume the universality of models, and explicit cross-cultural comparison of consumer behaviour models and tests for equivalence have been rare (van Herk, Poortinga and Verhallen 2005, Malhotra and McCort 2001).

In 1977 the psychologist Roy Malpass published an important article highlighting methodological problems in cross-cultural research. He noted at that time the “severe methodological difficulties and the preponderance of poorly controlled or interpreted study” in cross-cultural psychology (1977:1070). This claim is being echoed more recently in the field of cross-cultural marketing research (van Herk, Poortinga and Verhallen 2005, Malhotra and McCort 2001, Malhotra, Agarwal and Peterson 1996, Schaffer and Riordan 2003, Smith and Reynolds 2002, Sojka and Tansuhaj 1995, Steenkamp and Ter Hofstede 2002, Steenkamp and Baumgartner 1998, Thompson and Troester 2002, Vandenberg and Lance 2000, Veloutsou, Gilbert, Moutinho and Goode 2005).

Further expansion and development of cross-cultural marketing research is being hampered by methodological problems... Despite the clarion call of Bilkey and Ness (1982) methodological problems in this area have continued, limiting our understanding and constraining theory development....While articles dealing with cross-cultural research methodologies have appeared from time to time...a unified treatment of such issues has been lacking in the marketing literature...We end with a call for continued methodological

advances and theory development to advance cross-cultural marketing research (Malhotra, Agarwal and Peterson 1996:8)

It is not until the late 1970's and 1980's that discussion of cross-cultural measurement and equivalence issues appears in the marketing literature (Bhalla and Lin 1987, Tan, McCullough and Teoh 1987, van Raaij 1978). Tan et al. (1987) state that there has been "a failure of researchers to develop effective approaches to study consumer behaviour in different cultures" (1987:394), and believe the common approach of aggregated and comparative studies using imposed etic measures has hampered cross-cultural research. Seven years later Douglas, Morrin and Craig (1994) describe knowledge of differences in consumer behaviour across cultures as 'spotty', and confined to specific countries and areas of research. Their review of ten years of cross-national consumer behaviour research highlights a number of methodological limitations: external validity is rarely examined, and issues such as response bias or scalar equivalence seldom addressed. They conclude, "the rich potential of such studies in furthering understanding of consumer behaviour appears far from being realised" (1994:302). Their research showed few studies use causal modelling or confirmatory factor analysis<sup>5</sup> to test the underlying conceptual models in different cultures, and therefore relatively little progress has been made in understanding the underlying determinants of variation in consumption patterns, or in developing a more general theory of cross-national consumer behaviour (Douglas, Morrin and Craig 1994). They describe cross-cultural consumer research as "overly descriptive, and superficially or inappropriately comparative" (1994:290).

Sojka and Tansuhaj (1995) offer a thorough literature review of twenty years of cross-cultural research and identify five issues needing further attention if the field is to contribute to the understanding of consumer behaviour. They are: definition of cultural concepts; re-visiting early cross-cultural research; critical assessments of cross-cultural methods; focus on commonalities among cultures; and increased emphasis on theoretical underpinnings of cross-cultural consumer behaviour. They conclude that very few of the studies offered a theoretical and/or operational definition of culture, though many utilized values and beliefs to

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<sup>5</sup> Causal modelling - hypothesises causal relationships among variables and tests the causal models with a linear equation system. Confirmatory factor analysis - multivariate technique to test (confirm) a pre-specified relationship

operationalise it. Their overall conclusion was that the field was ripe for additional research on explanations of cultural phenomena and their impact on consumer behaviour.

In terms of cross-cultural values research in particular, there has also been criticism by several authors (Douglas, Morrin and Craig 1994, Thompson and Troester 2002, Zavalloni 1980): researchers have been guilty of using imposed etic measures, they have focussed on values characteristic of Western industrialised cultures, compared other cultures relative to themselves, and typically limited research to identifying the existence of values without examining their link or relation to consumption behaviour.

Rokeach's definition of values remains the major theoretical foundation for research on values in consumer behaviour, and the RVS and LOV that are based on this definition are widely used in a cross-cultural context. Rokeach assumed a universal set of human values (universal or essential psychological needs) that could be rank-ordered by importance. Cross-cultural values research therefore has attempted to explain consumer preference and behaviour as a function of different importance in values, and attempted to directly compare these across different cultures. Given the complex and ultimately ill-defined concept of culture, it can be argued that the reductionist approach to values (characterised by survey research based on the Rokeachian approach), can impede rather than facilitate efforts at deeper understanding of cross-cultural similarities and differences (Thompson and Troester 2002). On the cross-cultural use of instruments such as the RVS and LOV in consumer research, Thompson and Troester (2002) are critical;

In all these cases, culturally constructed and contextually nuanced meanings are reified as abstract psychological universals. The driving research agenda is to measure, aggregate, and classify consumers on the basis of their rank orderings (or importance weightings) among a set of nomothetic values. These classifications are divorced from any situational cultural context. As a result, they are not theoretically attuned to the cultural meanings from which value systems emerge, nor the meaning-based linkages between consumer values, consumption goals, and the consumption practices through which these goals are pursued (2002:552).

#### **4.10 The Etic/Emic Dilemma**

*"We cannot be 'cultural' without some notion like emic, we cannot be 'cross' without some notion like etic" (Berry 1989:93)*

Perhaps the single biggest problem in cross-cultural values research, and specifically in the use of scales such as the LOV cross-culturally, is the etic/emic issue. The terms etic and emic were originally proposed by Pike (1967), and although tension between the two approaches has developed in cross-cultural research, in his initial description Pike was explicit that both approaches were of value (Berry 1989). The emic perspective, commonly used in anthropology, regards culture as unique and best understood from within that context. "In the emic approach an attempt is made to look at phenomena and their interrelationships (structure) through the eyes of the people native to a particular culture, avoiding the importation of *a priori* notions and ideas from one's own culture on the people studied" (Berry et al. 2002). At the extreme of this school of thought, no comparison across cultures would be possible. The etic perspective, common in psychology, seeks to identify universal or 'culture free' theories and concepts, and develop generalisations across cultures (Douglas, Morrin and Craig 1994).

In relation to consumer behaviour, cross-cultural emic studies can provide rich insight into culture and consumer behaviour. However, they do not permit generalisations across cultures and therefore limit the development of general theories of consumer behaviour. Etic studies, on the other hand, attempt to compare the extent to which constructs and models vary between cultures and explain differences, or generalise theories. Pike suggested that the emic method helped researchers to not only appreciate culture or language in holistic ways, but also to explain the life, attitudes, motives, interests, and personality of people; while the etic/scientific approach hindered the ability to deal with these basic considerations because such phenomena cannot be rigorously investigated (Walle 1997).

The issues of reliability and validity that plague current cross-cultural research may almost certainly be seen to stem from a reliance on etic approaches to studying culture (Berry 1989). The problem that has arisen concerns the distinction between a true etic and a 'pseudoetic' (Davidson, Jaccard, Triandis, Morales, Diaz and Guerrero 1976), or 'imposed etic' (Berry 1989);

Methodologically the least defensible and most frequently adopted solution (to the etic/emic debate) is the 'pseudoetic' approach. According to this approach, emic measures (usually developed in the United States or Canada) are simply assumed to be etic. That is, instruments composed of items reflecting western conditions are translated and used in other cultures with little regard for the reliability or validity of the instrument in the new culture. Mean differences on these instruments are assumed to represent cultural differences with regard to the trait or process that the instrument purports to

measure. Rarely, if ever, does this approach yield fruitful results (Davidson et al. 1976:2).

More than twenty five years later, precisely the approach described by Davidson is still being widely used and published in the field of marketing research. Virtually all theories have been developed in Europe or the US, and very few have been validated outside of Western culture. The cultural hegemony of Western science has led to false assumptions that emic concepts of Euro-American societies are etic concepts. In international marketing there has been a tendency for researchers to implicitly or explicitly assume models based on American consumers are universally applicable, without testing the underlying model assumptions or the model linkages (Lee and Green 1991). A problem with cross-cultural values research in particular is the assumption that the values measured are ‘universal’ and applicable to every culture. While for some values this may be true, it should be kept in mind that there are many cultures whose values are relatively distinct and can functionally be regarded as culture-specific or emic (Chan and Rossiter 1997).

Several researchers have offered solutions to the etic/emic issue; however their ideas have rarely been put into practise. Berry (1989) advocates the use of both etic and emic approaches to research questions. The emic approach requires the researcher to set aside their own cultural biases and become thoroughly familiar with the new culture through observation, participation and other ethnographic methods. From a comparison of emic research in two or more cultures the researcher is then in a position to identify the common aspects for which comparison can be made, Berry (1969) terms this a derived etic. He suggests that local (emic) studies be conducted from within cultures, and the results then integrated into a valid framework for comparison in which etic knowledge is derived. Davidson et al. (1976) suggests a three-step procedure combining emic and etic approaches. Firstly, the researcher identifies an etic construct that appears to be universal. Secondly, emic ways of measuring the same construct are developed and validated, and finally “the emically defined etic construct can be used in making cross-cultural comparisons” (Davidson et al. 1976:2). In reference to values research, Smith and Schwartz (1997) suggests the most defensible approach is to start with parallel, emic studies within many different cultures, seeking convergence in the structure of values chosen for study.

What has been published on this issue over the past five years suggests some key theories in consumer behaviour such as behavioural intention frameworks (BI), and models built on the theory of reasoned action, rest on cultural assumptions not supported in other countries (Malhotra and McCort 2001). A cross-cultural comparison of behavioural intention models suggests “that the BI framework is applicable across cultures, yet must be operationalised with the distinctive thought processes of each culture in mind” (Malhotra and McCort 2001); i.e., must be operationalised at the emic level.

#### **4.11 Ethnocentrism**

Another problem, related to the etic/emic issue, is the almost exclusively Western cultural background of theories and instruments used in consumer behaviour research. This ethnocentrism raises numerous theoretical and methodological issues that remain unaddressed in much of the values literature, and make cross-cultural comparisons using value survey instruments questionable. In the quest for a true understanding of cross-cultural differences it is necessary that instruments be developed from an objective perspective. Researchers need to acknowledge their own cultural biases and be aware of the cultural assumptions underlying their research and the development of the instruments they employ (Bond 1988, Dimanche 1994, Verma and Mallick 1988). Western cultural values measures are themselves culture bound, and values relevant to other cultural traditions may be invisible from the Western conceptual viewpoint.

Several studies have specifically addressed the problems of using existing Western value measures in Eastern countries (Bond 1988, Lee 1991). Based on a value analysis of Korean school textbooks and a value survey of Korean managers, Lee (1991) found that, while the RVS captured many values relevant to Korean culture, it did not capture some of the most important ones, particularly values related to Confucianism such as filial piety, harmony, unity with others, and loyalty.

The Chinese Culture Connection (1987) developed a Chinese Values Scale (CVS) based on values identified by a group of Chinese social scientists as being the most fundamental values within their culture. Based on the application of the CVS to samples in twenty-two countries, results were analyzed in relation to Hofstede’s cultural dimensions. Three of the dimensions found correlated highly with three of Hofstede’s dimensions; however, a fourth dimension, termed ‘Confucian Work Dynamism’, was found to be unique to the CVS, suggesting that



Hofstede's values did not adequately cover this important set of values relevant to Chinese culture. Bond (1988) conducted a pancultural comparison of the CVS and Rokeach's Value Survey identifying five etic dimensions of values, one unique to the CVS, three unique to the RVS, and one common to both.

These studies highlight the fact that comprehensive cross-cultural comparisons of values can not be achieved without a thorough understanding of the cultures concerned (Lee 1991). However, despite calls to examine the ethnocentric nature of consumer research in general (van Raaij 1978), and values research in particular (Munson 1984), little has been published on this issue. Cross-cultural comparison using a values survey that does not address the full range of applicable values within a given culture and that is not supplemented with the relevant values will not be useful and may be quite misleading. The assumption that values scales such as the RVS and LOV provide a comprehensive coverage of the most important values cross-culturally, and are therefore appropriate for comparison in this context appears unwarranted. Neither instrument was designed as an instrument for cross-cultural research but both have been widely used for that purpose (Zavalloni 1980).

#### **4.12 Equivalence**

*“Cross-national research requires clear evidence of construct equivalence. Failure to assess construct equivalence increases the chances of invalid substantial inferences, perpetuates unsound measures and hinders the systematic accumulation of research findings” (Buss and Royce 1975).*

In order to apply a construct cross culturally it is necessary that the measurement be cross-culturally invariant or equivalent (Cheung and Rensvold 1999, van Raaij 1978, Vandenberg and Lance 2000, Veloutsou, Gilbert, Moutinho and Goode 2005). If measurement invariance is lacking conclusions are “at best ambiguous and at worst erroneous” (Steenkamp and Baumgartner 1998:78). In general, critical reviews of the literature suggest there is a lack of concern with measurement invariance in cross-cultural research, and tests for such are very rarely presented (Mullen 1995, Steenkamp and Baumgartner 1998, Vandenberg and Lance 2000). Hui and Triandis (1985) note the most commonly used strategy in cross-cultural research is crude translation and direct comparison; i.e., to administer the same instrument in

both cultures and compare using simple T-tests<sup>6</sup> or MANOVAS. This approach assumes the construct is equivalent, it is operationalised in the same way, and has scalar equivalence, but this is often not reported. Singh (1995) suggests that reliability levels of measures may vary from country to country, posing a serious threat to conclusions drawn from cross-cultural research. In a five-country study they found significant between-sample reliability differentials, however these differentials were not systematically high or low across countries or language groups but varied according to the type of variable. Unfortunately, cross cultural marketing researchers continue to make quantitative comparisons across cultures without adequately determining measurement invariance (van Herk et al. 2005, Schaffer and Riordan 2003, Steenkamp and Baumgartner 1998, Smith and Reynolds 2002).

To establish the cross-cultural reliability and validity of constructs (construct equivalence), several different types of equivalence must be addressed:

- The first requirement of invariance is **conceptual equivalence**. Conceptual equivalence requires that the concepts being measured are equivalent in each culture – in some situations a commonly used and understood concept in one culture might be absent in another culture and vice versa. Conceptual equivalence requires subjects' equal understanding and interpretation of concepts (Mintu, Calantone and Gassenheimer 1994).
- **Functional equivalence** requires that the items produce a regular pattern of relations with other variables or criteria within each culture, that they have similar precursors, consequents and correlates across cultures, (i.e., that the values measured have comparable predictive power with regard to, for example, consumer choice behaviour, across populations from different cultures) (Hui and Triandis 1985; Grunert, Grunert and Kristensen 1994). Concept, objects or behaviours studied must have the same role or function in all countries (van Herk et al. 2005).
- **Item equivalence** requires that each item must have the same cultural meaning: i.e., that the item reliably describes a particular/recognised phenomenon in the

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<sup>6</sup> Test to assess the statistical significance of the difference between two sample means

target culture. “In order for translations to be successful from one culture to another, they must utilize terms referring to real things and real experiences which are familiar in both cultures if not exactly equally familiar” (Sechrest, Fay and Zaidi 1972). (For a further discussion on translation see section 3.13).

- **Measurement equivalence** is achieved only if each scale item measures the underlying construct equivalently across cultures. Metric equivalence requires subjects to respond to the measurement scales in the same way; there are two threats to this in cross-cultural research – that the culture is not familiar with scaling or scoring formats or research methodologies; and/or response set bias. (For a further discussion on response bias see section 3.14).

The relationship between levels of equivalence are hierarchical and testing and accepting certain assumptions is only meaningful when lower level assumptions have been met (i.e. item equivalence becomes irrelevant if conceptual and functional equivalence have not been established) (Hui and Triandis 1985 van de Vijver and Leung 1997). However, in order to make quantitative comparisons across cultures, all levels of equivalence must be established (Steenkamp and Baumgartner 1998).

Factor analysis is the most popular method to assess the structural similarity of a construct across cultures. If a construct is the same in two different cultures (a prerequisite for comparison), it should have the same internal structure within each culture (Cheung and Rensvold 1999, Dimanche 1994, van Herk et al. 2005, Hui and Triandis 1985, Smith and Reynolds 2002, Steenkamp and Baumgartner 1998, Vandenberg and Lance 2000). Factor invariance requires that the same underlying dimensions can be found in data collected in different populations. “If similar factors, dimensions or regions do not emerge in each culture, or if values have quite different locations, meaning equivalence must be rejected” (Smith and Schwartz 1997:82). Factorial similarity (each scale item having the same loading on the same factors) is necessary but not sufficient for construct equivalence. The more complex measurement equivalence, however, requires the variance-covariance matrices of the error terms to be the same for each scale item (Cheung and Rensvold 1999). Correlations between items are also an important indicator of the cross-cultural comparability of the scale. If the correlations for each culture are similar (positively, negatively or nonlinear) we can assume the relationship between the items is similar across cultures and hence etc. However, if the

correlations are significantly different it indicates that the correlations are culture-specific or emic and therefore can not be compared cross-culturally (Leung and Bond 1989).

The importance of establishing factorial invariance in cross-cultural research is not new. In cross-cultural psychology at least, the idea of testing for factor invariance across cultures has long been recognised. Vandenberg's 1959 study comparing Chinese students' mental abilities with American students was probably the earliest attempt to calculate the degree of factor similarity across different cultures (Buss and Royce 1975). However, the issue is still rarely examined in much of the consumer behaviour literature (van Herk et al. 2005, Schaffer and Riordan 2003, Steenkamp and Baumgartner 1998, Smith and Reynolds 2002), and there is a need for rigorous analysis of data in cross-cultural marketing studies (Veloutsou et al. 2005).

Steenkamp and Baumgartner (1998) propose a model for the assessment of measurement invariance in cross-cultural research. Their approach is based on multi-sample confirmatory factor analysis, and they use the example of a consumer ethnocentrism scale in Belgium, Great Britain and Greece as an empirical application. Their model clarifies under what conditions meaningful cross-cultural comparisons of construct conceptualisations, construct means, and relationships between constructs can be made. They suggest that while full invariance is required for in-depth comparison, partial invariance can allow some valid cross-cultural comparisons to be made.

#### **4.13 Translation**

Language is a necessary key to the understanding of another culture. An understanding of the target language helps the researcher understand the construct of interest from a different cultural perspective. The relationship between values and language is a particularly interesting one, as the two are inextricably intertwined:

...some authors suggest that language influences values, and others propose that cultural values determine the form of languages. It is possible that the relationship is bi-directional. For example, cultural values may motivate the creation of words that may not exist in other cultures. At the same time, language may give origin to values that are literally 'unthinkable' in other cultures because of the lack of adequate terms to discuss them... However, existing research seems to be inconclusive in this area (Luna and Gupta 2001:50).

The issue of translation in values research thus becomes a particularly problematic one. It is increasingly understood in values research that there are many cultural concepts which have

no linguistic equivalents, and that translation does not guarantee conceptual equivalence (de Mooij 2004, Steenkamp and Ter Hofstede 2002). All translated instruments are subject to measurement problems and the validity and reliability of the question items in the various cultures/languages they are translated into are often overlooked (Dimanche 1994). Achieving translation equivalence is a very complicated process and involves not only translating vocabulary but also ensuring grammatical/syntactical; experiential; and conceptual equivalence (Dimanche 1994). Translation errors can “lead to the erroneous conclusion that cultural differences are substantive when, in fact, they stem from semantic inconsistencies” (Sperber, Devellis and Boehlecke 1994). Even if there is a semantically equivalent term found for a concept, it may be given different interpretations and have different implications in different cultures. Full semantic meaning may not always be translatable, and Kumar (2000) suggests that the focus should be on conveying the intended meaning of the items rather than on verbatim translation.

There are several methods that can be employed to address translation equivalence. These include: back translation (having one person translate the instrument into the target language and another person translate it back into the original language); parallel blind translation (having several individuals translate the questionnaire independently and compare results); the committee approach (as above but discussion occurs during translation); and decentering (both the source and the target language versions are viewed as open to modification, if translation problems are recognised within the source document it is modified to be more easily translatable) (Mayer 1978). The process of back translation is a good way to identify possible emic dimensions. Etic concepts would be those that survive the translation-back translation procedure, since they must be readily available and understandable in both languages, while emic concepts would be lost or provide difficulties in translation. The decentering method means the final questionnaire is not centered around any one culture or language and will lead the researcher to the best choice for each language.

The comparison across cultures of an instrument like the LOV depends on its items being understood and evaluated in the same way. The extreme non-redundancy of the LOV (every value is measured by one item only, in several occasions with only one word) makes it especially sensitive to translation problems (Grunert, Grunert and Kristiansen 1994).

#### **4.14 Response Bias**

Cultural differences affect how respondents respond cognitively and emotionally to surveys, the use of response sets, and the extent to which they are willing to reveal information about themselves/ admit how they feel (Grunert, Grunert and Kristensen 1994). Response sets refer to “tendencies to respond systematically to questionnaire items on some basis other than what the items were specifically designed to measure” (Baumgartner and Steenkamp 2001). Research has pointed to cultural differences in the extent of response bias (Hui and Triandis 1985), and this concern has been specifically expressed regarding the influence of these response biases in cross-cultural research (Leung 1989, Leung and Bond 1989, Smith and Schwartz 1997, Smith and Reynolds 2002, Veloutsou et al. 2005). Common examples include acquiescence bias, extreme responding, use of the middle point on rating scales, and socially desirability bias. Response sets can contaminate results by either inflating or deflating respondent’s scores, or altering the correlations between scores, leading to biased conclusions. There is evidence that countries may differ systematically on response sets (Steenkamp and Ter Hofstede 2002, Smith and Reynolds 2002). Specifically it has been shown that Japanese and Chinese respondents are more likely than North American respondents to use the mid point on Likert scales (Chen, Lee and Stevenson 1995, Smith and Reynolds 2002). Likert type scales tend to be the most problematic in terms of encouraging response sets (Smith and Reynolds 2002).

The problem of response sets can be addressed through the use of standardisation; however, standardisation can also eliminate true differences at the cross-cultural level. Leung and Bond (1989) stress the importance of considering the level of analysis in deciding how to standardise data (at the individual level of analysis scores should be standardised for each respondent, in a cross-cultural factor analysis the means within each culture should be standardised). Chen et al. (1995) note that cross-cultural differences in ratings can be the result of differences in response sets, but can also reflect true cultural differences in self-evaluations that may reflect the social orientation of individuals within a society (for example, Confucian philosophy and the value of modesty).

#### **4.15 An Application of Kahle’s List of Values**

In light of the methodological issues raised in this chapter, and in order to address the conflicting literature with regards to the List of Values applicability in Japan; primary research was undertaken to examine the reliability and validity of the scale to measure the

values of Japanese tourists to New Zealand. This research also addresses Kahle's specific call for additional cross-cultural research to confirm or disconfirm current findings related to the LOV, to assess the meaning and nuances of specific values to specific people, and to examine the specific relationship of values to attitudes and behaviours across nations (Kahle 2000).

A two-step methodology was employed to explore the validity and reliability of the LOV in the Japanese context. Firstly, in Study One, the factorial structure of the final data set was analysed to assess factorial invariance. In Study Two, a focus group interview was conducted to explore and discover the meaning of each of the nine value items. A group of native Japanese language instructors/linguists at the University of Otago were asked the meanings they associated with each of the nine values as they were translated into Japanese.

The focus group discussions revealed important differences in the meaning of the value items in Japan, and factor analysis indicated the LOV scale is not cross-culturally invariant. Both the quantitative and qualitative results indicate that the meanings of the items are not measuring the construct of interest reliably and thus that the LOV is not an appropriate instrument to assess Japanese values. The results of the focus group discussion suggest the value items, as translated into Japanese, differ significantly in meaning from the English items and clearly require an understanding of the culture to be interpreted. These results suggest, despite translation efforts, single value items cannot be simply applied and compared cross-culturally. Used in this context the LOV is an imposed etic measure based on ethnocentric items. It is a Western instrument, was not intended for cross-cultural research purposes, and potentially does not include the range of values important in other cultures. It is particularly open to problems of translation and response set bias and clearly does not meet the minimum requirement for cross-cultural equivalence.

In relation to Kahle's call for additional research into the LOV, these findings would appear to confute findings of past research using the LOV in Japan and its use cross-culturally in general. The findings confirm and support the work of Grunert and Grunert and Kristensen (1994) who suggested the cross-cultural validity of the LOV seems doubtful.

Values are socially constructed and inherently cultural. As such it is vital to understand the cultural context and nuance of value items when using value scales cross-culturally. The results of this study rule out the use of the LOV as an instrument suitable for application to

address the research question. Moreover, the literature review, combined with these findings, suggest inherent and unresolved issues that bring into question the validity of value scales in general as a methodological approach. The survey approach fails to link values to cultural context and does not examine their link to other constructs. It is unclear whether respondents are responding with regard to desired or desirable values, nor whether responses are indicating global values or are influenced by the context in which they are embedded (in this case the surrounding questions relating to tourism). This research indicates that qualitative, emic enquiry is necessary in determining the relevant value items, the culturally bound meaning of these items and their subsequent link to behaviour.

Further detail of this study is available in the article “Methodological Issues Using Kahle’s List of Values Scale for Japanese Tourism” published in the *Journal of Vacation Marketing* (2005) 11:3 (see Appendix A)

#### **4.16 Qualitative Approach to Values**

The dominant paradigm adopted in tourism research has clearly been the positivist paradigm, supporting the use of quantitative methods such as the survey approach to values. Walle (1997) suggests that the embracing of a ‘scientific’ orientation in the fields of marketing and tourism occurred in order that the ‘new’ disciplines establish themselves on par with other academic disciplines. Riley and Love (2000) suggest that the reliance on quantitative methodologies in tourism is based on the assumption that statistical sophistication was a necessary and sufficient condition for progress in the field of tourism research. There has also been a lack of receptivity by tourism reviewers and editors to publish qualitative methodologies, Riley and Love (2000) review qualitative research in four major tourism journals and found three of the four contained around only 5% of articles using qualitative methods, while the fourth journal included only about 20%. As a result, in the tourism field, qualitative research has mainly been used to provide information for developing further quantitative research (Walle 1997, Riley and Love 2000).

However several researchers in the tourism field are calling for greater use of qualitative research (McIntosh and Thyne 2005, Riley and Love 2000, Walle 1997), particularly in instances where formal/scientific methods are not useful and/or will not result in the needed data. Qualitative research provides a crucial perspective that helps scholars understand phenomena in a different way from a positivist perspective alone (Riley and Love 2000). In



particular, a qualitative approach is suggested for “understanding the meanings that tourists or hosts associate with the purchasing, consuming, or experiencing of tourism products and services, and the personal values that underlie their behaviour” (McIntosh and Thyne 2005).

In response to the growing body of literature on the methodological problems in cross-cultural values research summarised here, a number of researchers are calling for qualitative approaches as an alternative to survey research (Shrum McCarty and Loeffler 1990, Steenkamp 2002, Thompson and Troester 2002). Thompson and Troester (2002) advocate the use of detailed, qualitative enquiry to derive an in-depth, meaning-based understanding of the link between consumer values and behaviour. Specifically a Means-End approach to link values to product attributes and benefits has been called for (Steenkamp 2002). McIntosh and Thyne (2005) suggest Means-End theory has relevant and potential application in tourism research and argue that the theory is particularly useful for understanding personal values as the basis of tourist behaviour. They believe laddering facilitates “an inductive or consumer-oriented perspective to understanding personal values and behaviour” (McIntosh and Thyne 2005: 260). In particular McIntosh and Thyne draw attention to the suitability of the method for cross-cultural application, as it allows the examination of personal values associated with tourism as expressed and defined by tourists in their own terms rather than by any predetermined measure.

The following sections look in-depth at Means-End theory and the laddering technique as an alternative methodology to the survey approach to values research.

#### **4.16.1 Means-End Theory**

The Means-End model provides researchers with a theoretical framework that can be used to assess how consumer choice behaviour can lead to the satisfaction of certain personal values. Means-End theory asserts that a close relationship exists between the choices a consumer makes and the values they seek to satisfy. The models can be used to uncover the path between product choice and meaning for the individual consumer and in this way can reveal insights into consumer behaviour (Dibley and Baker 2001). Means-End was developed in consumer behaviour research by Gutman (1978, 1982) and is based on the work of Rokeach (1973), Vinson, Scott and Lamont’s Centrality of Beliefs (1977), Howards Means-End Chain Model (1977) and The Grey Benefit Chain (Young and Feigin 1975).

According to Means-End theory, consumers make choices because they believe that the specific attributes of a choice can help them achieve desired values through the consequences or benefits of that choice. The goal is to determine the linkages between attributes, consequences and values (A-C-V hierarchy). **Attributes** are concrete, tangible characteristics of a product or service. **Consequences** refer to the positive or negative consequences associated with using or experiencing a product/service; while **values** (as defined in Chapter Three) are intangible, higher-order outcomes or ends, being cognitive representations of consumers' most basic and fundamental needs and goals (ter Hofstede, Audenaert, Steenkamp and Wedel 1998:38). Means-End theory is based on the view that product features or attributes themselves have no inherent meaning to consumers, rather they gain meaning or importance through the consequences they are perceived to provide or help one avoid. Attributes, consequences and values therefore represent a Means-End chain of related meanings that can be used to help explain how products obtain their meaning or relevance to consumers (Klenosky 2002).

There are two common views of Means-End chains. The motivational (interpretivist) view is that Means-End chains are concerned with obtaining insight into consumers' motives, i.e. the way basic motives/values are linked to consumption behaviour. The cognitive structure (positivist/nomological) view sees Means-End chains as a model of consumers' consumption-relevant cognitive structures, i.e. the way consumption-relevant knowledge is stored and organised in human memory (Grunert, Grunert and Sorensen 1995). This research is interested in the application of the motivational/interpretivist view of Means-End theory.

#### **4.16.2 The Laddering Technique**

Laddering is a qualitative interviewing technique that is typically associated with Means-End theory. It refers to in-depth probing directed toward uncovering higher-level meanings. The technique is called laddering because it guides the respondent up or down the ladder of abstraction, linking relatively concrete meanings at the attribute level, to more abstract meanings at the benefit or personal value level. The laddering technique asks the respondent to think critically about the connections between product attributes and personal motivations through guided discussion. Gutman (1982) provides a structure for the laddering technique that finds a balance between obtaining responses in the consumer's own language and providing a framework for interpretation. Rather than forcing respondents into predetermined

categories, laddering enables respondents to define personal values in their own way and context.

The laddering procedure involves three steps

1. Elicitation of salient attributes – At this stage various methods (e.g. repertory grid, stimulus grouping, direct elicitation) are used to elicit the salient attributes of the product/service of interest.
  
2. The in-depth interview – Based on the elicitation of salient attributes respondents are asked which they most prefer. They are then asked why that preferred aspect is important to them. The answer to the second question typically leads to distinctions involving function and consequences that result from that decision. These replies become the basis for generating still higher-level distinctions. The procedure is repeated until respondents can no longer answer the “Why is that important to you?” question. Reynolds and Gutman (1984) have detailed several interview techniques that can be used to encourage respondents to identify constructs further up the chain. For example: evoking the situational context; postulating the absence of an object or state of being; negative laddering; age regression; contrast probes; third person probes; and redirecting techniques.
  
3. Analysis of results – Distinctions at the different levels of abstraction can be labelled A-C-V and drawn in a ladder representing the number of connections between the elements. From these individual summary diagrams, a matrix can be constructed in which the concepts constitute rows and columns and the frequency with which an attribute, consequence or value leads directly or indirectly to another A-C-V is recorded. A hierarchical value map (HVM) can be constructed, graphically representing the content and structure of the dominant connections between the elements across all consumers.

#### **4.16.3 Means-End Use in Consumer Behaviour Research**

Means-End theory and the laddering technique developed within the marketing discipline and have been widely used to examine personal values associated with consumer behaviour (e.g. Aurifeillet, Vallette-Florence 1995, Gutman 1990, Peter and Olsen 1987, Perkins and Reynolds, 1988, Pieters, Baumgartner and Allen 1995, Valette-Florence and Rapacchi 1991). Means-End theory is increasingly being adopted in tourism research to examine tourism behavior and values. The theory provides a framework for relating the attributes of tourism

products, such as alternative travel destinations, to the important factors that motivate and influence tourist decision making and travel behaviour. Investigation has focused on: destination choice (Klenosky, Gengler and Mulvey 1993, Klenosky 2002); museum and heritage visiting (Crotts and Van Rekom 1998, McIntosh and Prentice 1999, Thyne 2001); nature-based experiences (Frauman and Cunningham 2001, Frauman Norman and Klenosky 1998); and accommodation choice (Mattila 1999, Thyne and Lawson, 2000).

Klenosky et al. (1993) used Means-End to understand the factors influencing ski destination choice and found it to be a logical framework and methodology for relating tangible and intangible elements. They suggest that Means-End can be used to address a broad range of applied and theoretical problems facing leisure and tourism researchers. Van Rekom (1994) believes the motives of tourists are deeply rooted in their patterns of expectations, goals and values, and the laddering technique is a research technique very well suited to the purpose of relating travel choices to values. Thyne and Lawson (2000) investigated the link between values and tourist's accommodation and activity choices using the laddering technique and found laddering methodology to be a relevant method for determining the respondent's intrinsic values behind their motivations.

#### **4.16.4 Criticism of Means-End Methodology**

Criticisms of the Means-End theory and the laddering technique focus on the forcing of relationships between values and behaviour; how many linkages there are and how they should be presented; and, coding and analysis of the data (Grunert and Grunert 1995, Gutman 1991). The forcing of relationships between values and behaviour is an important consideration; critics of Means-End argue that the approach may force relationships that may not be recognised or have any clear meaning to respondents (McIntosh and Thyne 2005). However this criticism is also true of deductive predetermined measures such as value surveys; the clear advantage of the Means-End method is that respondents are in a position to express and define their own values and their link to behaviour. The forcing of relationships can largely be dealt with through the laddering technique employed i.e. the use of soft laddering (see section 6.7.3).

Grunert and Grunert (1995) outline four criteria for deriving valid measures of Means-End data. Though Grunert and Grunert suggest the criteria in relation to a cognitive structure view

of Means-End chains, three of the four are also relevant to the motivational view adopted for this thesis.

- The raw data should be a result more of the respondent's cognitive structures and processes than of the researcher's cognitive structures and processes. To address this issue they suggest open/soft methods in which each respondent can relate their own cognitive categories. They recommend allowing for forked answers and not pushing lines that have ended.
- The data collection process should not involve strategic processes not typical of the target situation. The more the respondent hesitates and thinks the more the task becomes a problem solving one and less like a consumption situation. If laddering respondents can't answer quickly it is recommended to move away and go back to the question later. Identifying the respondent's main focus and invoking an appropriate situational context increases the probability of obtaining a meaningful and relevant hierarchy.
- Coding should be based on cognitive categories widely shared by both consumers, researchers and users of research. Grunert and Grunert suggest this can be achieved by eliciting redundancies to rule out ambiguities. To meet this criterion they recommend taping and transcribing interviews to allow for multiple coding. Answers must be interpreted relative to the respondent's background and experience.

#### **4.17 Conclusion**

While there are numerous issues threatening the validity of values research in general, there are further problems to consider in a cross-cultural context. The emic/etic distinction, ethnocentrism, various threats to equivalence, translation issues, and response sets, all further complicate the comparison of values cross-culturally. However, despite the extensive cross-cultural psychology literature dealing with methodological issues, and the criticisms of some consumer behaviour researchers, methodological issues remain unaddressed in many cross-cultural values studies. While various authors have noted specific problems with cross-cultural values research, this literature review brings these disparate criticisms together to reveal the range and depth of unresolved problems with the empirical, survey based approach to values research.

Researchers have failed to clearly define, conceptualise and operationalise culture, pseudo-etic measures based on ethnocentric biases have been imposed on other cultures and the results compared statistically with no acknowledgement of equivalence issues. The driving force behind cross-cultural values research has been to measure, aggregate, and compare consumers across cultures using measures designed in one culture, often with no demonstrated consideration for the validity of the instrument in other cultures. The results of such comparison are misleading. These measurement scales are also not linked in any way to the cultural meaning-based linkages between values and behaviour. The inherent difficulties and potential threats to values research using value scales suggests a qualitative approach to values research may be more useful both in identifying the relevant cross-cultural values and examining their link to behaviour.

The LOV is a Western instrument, was not intended for cross-cultural research purposes, and potentially does not include the range of values important in other cultures. It is also particularly open to response bias and translation issues because of its extreme non-redundancy. However, despite criticisms it continues to be widely used in marketing research and Kahle (2000) has suggested it is a viable nominee for a globally accepted measure of cross-cultural values. This chapter offers a test of the LOV in Japan, suggesting the scale is not cross-culturally invariant and therefore not a valid or reliable measure of Japanese values.

The Means-End approach to values research offers a qualitative alternative to the survey approach that enables the examination of personal values associated with tourism as expressed and defined by tourists in their own terms rather than by any predetermined measure.

## **Chapter Five – Summary of Literature and Research**

### **Objectives**

#### **5.1 Introduction**

This chapter reviews the literature presented in Chapters Two, Three and Four, and outlines the research objectives stemming from this literature.

#### **5.2 Summary of Literature**

An understanding of culture is vital to the success of international marketing and tourism efforts. The large extant literature on Japanese tourism examines a range of key characteristics of Japanese travel behaviour; however, this research is mainly descriptive and does not examine the fundamental link between travel behaviour and cultural values (Chon, Inagaki and Ohashi 2000). The literature reviewed in Chapter Two outlines the cultural and social context of Japanese travel behaviour, and highlights the need to understand tourist decision making in NZ with reference to deeply held cultural and historical values and beliefs. Despite the huge importance of the Japanese market to New Zealand tourism our knowledge of the values and motives that drive their tourism behaviour and choices is limited.

The literature suggests that cultural values and characteristics shape and affect human thought and behavior and that culture is a major, if not the major, factor contributing to individual differences in behavior (You, O’Leary, Morrison and Hong 2000). Work on culture in the marketing discipline has primarily focussed on classifying cultures into various cultural dimensions and investigating the links between these dimensions and consumer behaviour (Hofstede 1980, Schwartz 1992). The individualism/collectivism (I/C) dimension is the most widely used dimension of culture used to explain cross-cultural differences in consumer behaviour. In the marketing discipline, Japanese culture has been defined by the I/C paradigm and by notions of uniqueness and homogeneity. However, I/C and other such distinctions have been widely criticised by Japanese scholars as not being applicable to Japanese culture, which does not recognise such a distinction (Hamaguchi 1985). The I/C distinction is an imposed Western empirical model that tells us nothing about why these differences exist, or how those in a ‘collectivist’ culture understand their experience.

Many scholars view values as a central component of culture and therefore a key element characterising similarities and differences between societies (Erez and Earley 1993, Hofstede 1980, Kroeber and Kluckhohn 1952, Trompenaars 1993). Values have long been considered a core element of culture and used to conceptualise its influence on behaviour. Clearly values have an important place in the study of cross-cultural consumer behaviour research as a link between culture and behaviour.

The study of values has a long history in the social sciences and their application in consumer research has shown significant relationships with consumer choice behaviour. The most popular approach to values research in marketing has been the Rokeachian approach. Values are typically assessed through the use of value surveys such as RVS, SVS, VALS and LOV. The LOV is widely employed in consumer behaviour research as it is considered a more parsimonious alternative to the RVS and SVS, it is easy to implement, and the value items are regarded as more related to everyday consumption situations (Beatty, Kahle, Homer and Misra 1985).

There is an acknowledgement in the literature of the necessity for a standard cross-cultural values measure, and it has been suggested that researchers should rely on instruments of known validity and reliability in an effort to develop some cumulative knowledge of values and consumer behaviour (Becker 1998, Kahle 2000). Kahle (2000) has suggested the LOV is a viable candidate for a widely accepted instrument for the cross-national and cross-cultural comparison of values and it has been applied widely in this context.

While values survey research is the preferred method of investigating values in cross-cultural consumer behaviour research, there are a number of potential problems with this approach that have not been widely discussed in the marketing literature. The link between culture, values and behaviour is well established and values research in marketing has been extensive; however, its results have not always been conclusive (Chan and Rossiter 1997). It has been suggested the problems may be attributable to methodological issues in operationalising value measures rather than an inherently weak relationship between values and behaviour (McCarty and Shrum 2000). Values are by definition subjective and personal, and thus their measurement inherently difficult. Values research in general faces a number of unresolved issues that threaten its validity such as the situational versus transcendental nature of values, the level of value analysis, and values link to other constructs, including behaviour. In



particular, the survey approach to values has not resolved the issues of measuring single values versus value systems, value rating versus ranking, and whether respondents are responding with regard to 'desired' or 'desirable' values.

Cross-cultural psychology literature has long published on the inherent difficulties in the use of scales cross-culturally (Berrien 1967, Berry 1969, Brislin, Lonner and Thorndike 1973, Frijda and Jahoda 1966, Malpass 1977). The issues of etic versus emic constructs, ethnocentrism, equivalence, translation, and response sets are important areas of methodological consideration in cross-cultural research. While a growing number of authors have raised the issue of cross-cultural methodology in the marketing literature, many researchers continue to use scales cross-culturally without consideration of these important issues (van Herk, Poortinga and Verhallen 2005, Malhotra and McCort 2001, Schaffer and Riordan 2003, Steenkamp and Ter Hofstede 2002, Smith and Reynolds 2002, Thompson and Troester 2002, Vandenberg and Lance 2000, Veloutsou, Gilbert, Moutinho and Goode 2005).

A review of this literature suggests that despite its wide and continued use in marketing, the LOV may not be applicable as a measure for cross-cultural comparison of values. It is particularly open to response bias and translation issues because of its extreme non-redundancy (Grunert, Grunert and Kristiansen 1994). However, despite these criticisms it continues to be widely used in marketing research, and Kahle (2000) has suggested it is a viable nominee for a globally accepted measure of cross-cultural values.

Chapter Four presents a study examining the validity and reliability of the LOV as a measure to operationalise values in Japan. Results of this study suggest that the LOV is not suitable as a measure to investigate values in the Japanese context.

The positivist, survey approach to values research that has dominated the marketing and tourism literature has not been useful in addressing the question of the influence of culture and values on consumer behaviour. The survey approach to values has numerous unresolved issues that threaten the validity and reliability of this approach and these issues are highlighted in the application of the LOV in Japan. Qualitative research provides a crucial perspective not offered by the positivist perspective alone; a qualitative approach such as Means-End appears more useful in understanding the values impacting on Japanese tourism in New Zealand. In particular, the laddering methodology facilitates a consumer oriented

perspective to understand personal values and behaviour as expressed and defined by tourists in their own terms (McIntosh and Thyne 2005). This research indicates that qualitative, emic enquiry is necessary in determining the values relevant to Japanese tourism behaviour and their subsequent link to behaviour.

### **5.3 Research Question and Objectives**

The research question for this thesis is: **What are the values relevant to Japanese tourism behaviour, and how do these values impact on tourism behaviour and decision choices for Japanese tourists to New Zealand?**

Objectives:

The specific objectives of this thesis are:

1. To discuss the limitations of conventional approaches to the study of values and to examine the cross-cultural validity of the LOV scale in Japan
2. To establish and apply an alternative methodology to value surveys to investigate the link between values and tourism behaviour
3. To provide academic researchers with a framework for conceptualising the relationship between culture, values and consumer behaviour
4. To enhance our understanding of the benefits sought and behaviour of Japanese tourists to NZ with respect to Japanese culture and values

## **Chapter Six – Methodology**

### **Part One - Research Design**

#### **6.1 Introduction**

This chapter will detail the paradigm and methodology adopted to address the research question. It will discuss the appropriateness of an interpretivist approach in light of the findings presented in Chapter Four; and outline the fundamental beliefs underpinning the interpretivist paradigm. Issues of methodology, and the specific methodology chosen, will be discussed, before the data collection and analysis techniques used are detailed. The results of the data analysis will then be provided and discussed in Chapter Seven.

#### **6.2 Objectives of the Research**

This thesis seeks to identify the values relevant to Japanese tourism behaviour, and understand how these values impact on tourism behaviour and decision choices for Japanese tourists to New Zealand. A discussion of the limitations of conventional approaches to the study of values, and the failure of a quantitative approach using a Western values measure (LOV) for the purpose of understanding Japanese values and consumer behaviour (Objective One) are presented in Chapter Four. The literature review and the empirical results presented suggest an alternative approach to values research is necessary. In light of these findings the research question can best be approached through qualitative, emic enquiry; allowing informants themselves to offer insight into their behaviour and underlying values. The objectives for this phase of the research are:

- To establish an alternative methodology to value surveys to investigate the link between culture, values and tourism behaviour (Objective Two)
- To provide academic researchers with an alternative framework for conceptualising the relationship between culture, values and consumer behaviour (Objective Three)
- To enhance our understanding of the benefits sought and behaviour of Japanese tourists to NZ with respect to Japanese culture and values (Objective Four)

#### **6.3 The Research Paradigm**

This section defines the two dominant paradigms in social science research, positivism and interpretivism, and discusses the ontological, axiological and epistemological assumptions of

the two approaches that guide research within each respective paradigm. The interpretivist paradigm adopted for this research is discussed in greater depth, as is the appropriateness of this paradigm to the research context.

A paradigm is “the basic belief system or worldview that guides the investigator, not only in choices of method but in ontologically and epistemologically fundamental ways” (Guba and Lincoln 1994). The chosen paradigm defines for the researcher the nature of reality and the nature of social beings - **ontology**; the fundamental goal of research (including values and ethics) - **axiology**; and the relationship between the knower and what can be known - **epistemology** (Hudson and Ozane 1988). This in turn guides the methodology, the technique used by the researcher to investigate the topic of interest.

Positivism is also referred to as logical empiricism, the accepted or conventional view, and behaviourism. Positivism developed within the Enlightenment period of Western thinking, and is based on the premise that people can recognise truth and distinguish it from falsehood by applying reason. Positivists see social science as a “method for combining deductive logic with precise empirical observations of individual behaviour, in order to discover and confirm a set of probabilistic causal laws that can be used to predict general patterns of human activity” (Neuman 2000:66). It assumes the laws of human behaviour to be universally valid, holding in all historical eras and cultures (Neuman 2000). The positivist paradigm assumes a separate reality that is apprehendable to the researcher. The researcher is considered capable of an objective relationship with reality and the goal of research is to explain and predict. Typically, positivist researchers use quantitative methodologies to verify hypotheses and focus on methods such as experimental design, observation, and surveys. However, both qualitative and quantitative methods may be used appropriately within any paradigm (Guba and Lincoln 1994). The survey approach to values research, presented in Chapter Four, is clearly grounded in the positivist paradigm.

Interpretivism is also commonly referred to as qualitative research, and incorporates research approaches such as hermeneutics, constructionism, and ethnography. Interpretivism can be traced back to Wilhem Dilthey and Max Weber, who argued that researchers must learn the personal reasons or motives that shape a person’s internal feelings and guide decisions to act in particular ways (Neuman 2000). Interpretivism holds a relativist ontology; that is, there is not one single apprehendable reality, but rather reality is local, constructed and influenced by

historical, social, political and cultural values. Thus the researcher's relationship with this reality is subjective, and knowledge can only be mediated or co-constructed between the researcher and their subject of interest. Interpretivism can be described as "the systematic analysis of socially meaningful action through the direct detailed observation of people in natural settings in order to arrive at understandings and interpretations of how people create and maintain their social worlds" (Neuman 2000:71). Based on these assumptions, interpretivist methodologies are commonly qualitative and research focuses on data collection techniques such as descriptive analysis of historical documents, participant observation, interviews and focus groups (Guba and Lincoln 1994). Table Five below highlights the contrasting axioms of the positivist and interpretivist approaches to social science.

**Table 5**

Contrasting Positivist and Interpretivist Axioms (Lincoln and Guba 1985)

Axioms	Positivist Paradigm	Interpretivist Paradigm
The nature of reality	Reality is single, tangible, and fragmentable	Realities are multiple, constructed and holistic
The relationship of knower to the known	Knower and known are independent, a dualism	Knower and known are interactive, inseparable
The possibility of generalisation	Time and context free generalisation (nomothetic statements) are possible	Only time and context bound working hypotheses (ideographic statements) are possible
The possibility of causal linkages	There are real causes, temporally precedent to or simultaneous with their effects	All entities are in a state of mutual simultaneous shaping, so that it is impossible to distinguish causes from effects
The role of values	Inquiry is value-free	Inquiry is value-bound

### 6.3.1 Interpretivism

Of the two dominant approaches to research in the social science discipline, the primary research for this research is firmly grounded in the interpretivist paradigm. Given the problems highlighted in using a positivist approach to values research (see Chapter Four) and the complex nature of the constructs of interest (culture, values and behaviour), the interpretivist paradigm, with its emphasis on complexity, content, relationships between constructs and personal experience of meaning is the most appropriate paradigm for the research focus. This section will elaborate on the ontological, axiological and epistemological assumptions underpinning the interpretivist approach taken in the primary research.

The basic ontological position of interpretivist research assumes reality is socially constructed and that research is "dealing with complex social phenomena involving reflexive people" (Healy and Perry 2002). Thus it is crucial for the researcher to understand the context of a behaviour or event, study people in their natural context, and view people holistically. Further, people should be studied according to their own perspective or frame of reference,

rather than from that of the researcher (Hudson and Ozane 1988). While in the positivist paradigm human behaviour is viewed as determined and therefore predictable, in the interpretive approach people are seen as creatively interacting with and shaping their environment. People create meaning through their interactions in the world and it is this meaning that the research seeks to uncover (Hudson and Ozane 1988). According to the interpretivist world-view, while human behaviour may be patterned and regular, this is not due to pre-existing laws waiting to be discovered. The patterns are created out of evolving meaning systems or social conventions that people generate as they socially interact. Interpretive researchers want to discover what actions mean to the people who engage in them (Neuman 2000). This research is interested in identifying and understanding the values Japanese people themselves define as being important in their tourism behaviour, and examining what that behaviour means to them.

While the axiological goal of positivist research is explanation and prediction, the primary goal in interpretivist research is understanding. This understanding is based on the concept of *verstehen* - grasping the shared meanings within a culture of language, contexts, roles, rituals, gestures, arts, and so on (Hudson and Ozane 1988:510). The research is a continuing process of understanding and will not offer *the* understanding but *an* understanding. To gain *verstehen*, the research strives for an insider's perspective, and a knowledge of culturally shared and individual meanings (Neuman 2000). While positivist research places a high priority on causal linkages, interpretivists see the world as so complex and changing that it is impossible to distinguish cause and effect (Hudson and Ozanne 1988). The objective is to understand the phenomenon and interpret the respondent's experiences and beliefs in their own terms. In interpretivist research, values are recognised as included and formative in research methodology and the researcher is viewed as a passionate participant rather than a value-free, disinterested scientist. While in the positivist paradigm researchers strive to remain value-free, in interpretivist research being value-free is not seen as desirable or possible, and thus values are made explicit and recognised as impacting both on the choice of research question and on findings.

Lincoln and Guba (1985) highlight four key values which impact on research: "the values of the investigator personally, the values undergirding the substantive paradigm that guides the inquiry, the values undergirding the methodological paradigm that guides the inquiry, and the values that inhere in the cultural setting within which the inquiry is carried out" (1985:174).

The remainder of this section (Part One) makes explicit the values underlying the substantive paradigm guiding the research (interpretivism), and the values underlying the methodological paradigm (Means-End theory). The research itself is specifically interested in understanding the values of the cultural setting in which the inquiry is based (i.e. the relevant Japanese cultural values). The personal values of the researcher relevant to the research methodology are:

- Postmodern – in the sense of being wary of empirical quantitative investigation of personal experience. Postmodernism asserts that beyond what can be directly perceived and measured, personal values, meaning and decision have a larger significance or interpretation. Postmodernism is highly suspicious of attempts to organize or understand society on the basis of universal values, beliefs or perspectives, and asserts that efforts to understand and be sensitive to fragmentation, difference and the local are more fruitful than classification, binary oppositions and hierarchies (modernism). The researcher considers that all knowledge is derived from a particular perspective and we should document, juxtapose and challenge our knowledge to uncover the hidden biases behind the concepts we use.
  
- Humanistic View of Human Behaviour – the researcher holds a hopeful, constructive view of human beings and their substantial capacity to be self-determining, and to act in accordance with their value beliefs. Humanism sees the self as a unique individual, affirms each person as a value-bearer, feels each person is free to choose rather than be driven by inward compulsions or circumstantial pressures, and insists humans are persons on the way (*en via*), searching for a whole life (Gould 1993). The idea that the distinguishing mark of our individual uniqueness is that we are value-bearing beings was first emphasised by Aristotle, and later Immanuel Kant and Viktor Frankl. Significant humanist scholars include Abraham Maslow, Rollo May, Carl Rogers and Gordon Allport. Allport believed personal values are the dominating force in life and all of a person's activity is directed toward the realisation of his values (Gould 1993). While acknowledging the potential for respondent bias in the interpretivist approach to research, the researcher has an inherent belief that respondents are self-reflexive, honest and capable of rationalising and reporting their own values.

Epistemologically, the interpretivist researcher is seen not as a detached observer but as an active participant. Rather than seeking to 'know' generalisable abstract and widely applicable laws, the interpretivist takes a particularist and historical approach to determine motives, meanings, reasons and other subjective experiences (Hudson and Ozanne 1988). Through active participation in the culture the researcher strives for an insider's view, a knowledge of the shared meanings. This approach does not facilitate generalisable statements outside the context, however it does allow generalisation within the research context, and these findings can often be transferred to other contexts in the form of an abstracted theory.

Typically in interpretivist research, and as is the case with this thesis, the research is considered an emergent process, the research is continually evolving according to the changing knowledge and understanding of the researcher (Hudson and Ozanne 1988). Interpretivist research is also linked to an inductive approach beginning with detailed observations of the world and moving toward more abstract generalisations and ideas. This is in contrast to a deductive approach, common in positivist research, that starts with abstract, logical relationships and moves toward concrete empirical evidence (Perry 1998).

### **6.3.2 Appropriateness of the Interpretivist Paradigm to the Research Context**

Cultures differ in their metaphysical or fundamental beliefs about the nature of the world, and use cognitive tools and thought processes that make sense given these beliefs. The holistic, complex and interrelated world-view associated with the interpretivist paradigm is much closer to the world-view held in the country of interest – Japan. Positivism can be seen as being consistent with a Western world-view; objective, analytic, deterministic, and governed by formal logic. It reflects an emphasis on objects (rather than context), categorisation, and the ability to control outcomes. In contrast, the East emphasises harmony, holism, interrelatedness and contradiction. Events are seen as highly complex, dependent on context, and often impossible to control; and the social world is viewed as a web of interconnected human relations (Nisbett 2003). Thus, as is consistent with the interpretivist paradigm, the research seeks to understand the topic of interest from within the frame of reference of the informants, rather than through a traditionally Western positivist paradigm. The basic beliefs of the Western and Eastern paradigm are summarised in the table below.



**Table 6**

Basic Beliefs of Dominant (positivist) vs. Emergent (interpretivist) Paradigms  
(based on Schwartz and Ogilvy 1979)

<b>Dominant Positivist (Western) Paradigm</b>	<b>Emergent Interpretivist (Eastern) Paradigm</b>
Simple	Complex
Hierarchy	Heterarchy
Mechanical	Holographic
Determinate	Indeterminate
Linearly causal	Mutually causal
Assembly	Morphogenesis
Objective	Perspective

#### **6.4 Theory Contribution in Interpretivist Research**

*Analysis of culture is not an experimental science in search of law but an interpretive one in search of meaning...the essential task of theory building here is not to codify abstract regularities but to make thick description possible, not to generalise across cases but to generalise within them (Geertz 1975:26).*

In interpretivist research the aim is not nomothetic generalisations. Generalisations are defined as universal statements unrestricted by time and place, useful for the purposes of explanation and prediction. The idea that generalisations are possible rests on a positivist ontology, the acceptance of a single reality that can be known empirically. It is consistent with the mechanistic world-view but not with the interpretivist view that reality is locally constructed. However, interpretivist research is often criticised for its specific, ideographic interpretations that are not considered useful outside the context in which they were gathered. Lincoln and Guba (1985) suggest the idea of a continuum, rather than a division between nomothetic and ideographic outcomes, and put forward the idea of transferability as opposed to generalisability as more relevant to interpretivist research.

Transferability is the statement of outcomes from context A that might be true in (i.e. transferable to) context B. Clearly in order to make a contribution to theory, some level of transferability of findings is essential, though the researcher's role is only to ensure that the findings are detailed enough to allow other researchers to assess the transferability to the context they are interested in (Lincoln and Guba 1985). Interpretive social science theory describes and interprets how people conduct their lives. It gives the reader a feel for another's social reality by revealing the meanings, values, interpretive schemes and rules of living used

by people in their daily lives. A theory is 'true' if it makes sense to those being studied and if it allows others to understand deeply or enter the reality of those people (Neuman 2000).

This research aims to describe and interpret how Japanese people's values guide their travel behaviour decisions. The intended outcome is not to establish generalisations regarding Japanese tourist behaviour, but to offer a deep understanding of the meanings and values of Japanese people in their role as tourists in NZ; and thereby to 'enhance our understanding of the benefits sought and behaviour of Japanese tourists to NZ with respect to Japanese culture and values' (Objective Four). The research will examine the concrete links between values and specific behaviour; however consistent with the interpretivist paradigm, these observations are recognised as only relevant in the research context, and are not made in the interest of generalisations or predictions of Japanese travel behaviour in general. However to the degree that they contribute to our depth of understanding of the Japanese tourist market, the findings may suggest better or more appropriate actions for marketing practitioners.

The theoretical contribution of the research is to provide a framework for conceptualising the relationship between culture, values and consumer behaviour (Objective Three). This research challenges the theory that a set of universal human values can be compared cross-culturally, and used to understand consumer behaviour. The preceding literature review and empirical data analysis has brought attention to and offered a critique of multiple elements of this theory. The evidence presented is logical, empirical and epistemological. This research challenges the idea that values can be measured and understood in a paper-and-pencil empirical scale, and proposes that intervening variables such as culture and context mediate the relationship between values and behaviour. This phase of the research seeks to understand the inconsistency between contemporary literature which suggests the cross-cultural comparability of existing value scales, and the data presented in Chapter Four. Its aim is to learn something new about the theory of values as a result of its application to this context, and to propose methodological and epistemological alternatives to the accepted (positivist/empirical) approach to cross-cultural values research. The research proposes and tests an interpretivist, emic approach as a more appropriate methodology for investigating the link between values and tourism behaviour in a cross-cultural context (Objective Two).

## 6.5 Criteria for Rigor in Interpretivist Research

Lincoln and Guba (1985) propose four criteria for qualitative research which map the traditional positivist criteria of internal validity (truth value/credibility); external validity (applicability/transferability); reliability (consistency/dependability); and objectivity (neutrality/confirmability).

**Truth value/credibility** – interpretivist researchers must show that they have represented the multiple realities of the respondents adequately, i.e. they are credible to the constructors of the original reality. To operationalise this Lincoln and Guba (1985) suggest three key criteria for research: prolonged engagement, persistent observation and triangulation. Prolonged engagement demands the investment of sufficient time to learn about the culture, and therefore to test for misinformation introduced by distortions of either self or respondents. Building trust is also a goal of prolonged engagement and allows the researcher to demonstrate to respondents that confidences will not be used against them, anonymity will be honoured etcetera. Triangulation is another method used in interpretivist research to ensure results are credible. This can be triangulation of sources, methods, investigators, or theories. Peer debriefing, the holding back of some data for later analysis, and checks with members of stakeholder groups are other ways of establishing credibility in interpretivist research.

**Applicability/transferability** – the interpretivist researcher does not seek to generalise; thus the idea of transferability rather than external validity is salient. The responsibility of the researcher is to provide sufficient descriptive data so that future researchers who wish to apply the findings in another setting have enough evidence of contextual similarity to allow for transferability judgements.

**Consistency/dependability** – to ensure the consistency of research, the researcher must take into account factors of instability and factors of phenomenal or design induced change. This can be operationalised through an inquiry team of at least two persons to deal with data separately. It can also be established through an audit of the research.

**Neutrality/confirmability** – to the interpretivist researcher, objectivity does not mean value-free judgements, detached observation, or the goal of findings corresponding to one reality; it does mean that data are reliable, factual and confirmable. The audit trail is a method of demonstrating the confirmability and neutrality of findings. It should include raw data (tapes,

notes); data reduction and analysis products (summaries, hunches, concepts); data reconstructions and synthesis products (structure of categories, connections); process notes (methodological notes, trustworthiness notes); materials relating to intentions and dispositions (personal notes, reflexive journal, expectations); and instrument development information (pilot forms, schedules, observation formats).

A further consistently applied criterion for interpretive research is that the phenomenon be examined in the natural setting. Because meaning is derived from context, studies must take place in natural settings in order for researchers to see things similarly to the way the people being studied see them, and therefore to know the questions, problems, and data that are meaningful (Hudson and Ozane 1988). A related criterion is that the language and terminology of the people being investigated be used (Fielding and Fielding 1986, Knorr-Cetina 1983). Interpretivism holds that language reflects linguistic cultural differences that the subtle process of translation may miss. For this reason interactions should be recorded verbatim and in the respondents' own language to capture the emic perspective (Hudson and Ozane 1988).

Each of these criteria have been addressed in the research methodology and are outlined in section 6.8.

## **6.6 Means-End Methodology**

The methodology chosen as most appropriate to address the research question was Means-End methodology. Consistent with the interpretivist paradigm, Means-End offers a theory and methodology suitable to investigate the link between values and behaviour as defined by respondents themselves. Means-End allows respondents to define and examine personal values and their link to behaviour in their own language and terms and does not impose value labels or construct links *a priori*. It investigates meaning for the individual consumer and allows them to express this meaning in context. The Means-End methodology also addresses several of the problems inherent in value surveys discussed in Chapter Four.

### **6.6.1 Appropriateness of Means-End Methodology to the Research Question**

Means-End theory can be contrasted with survey based research methods such as the RVS and LOV, and addresses several of the concerns regarding these methods raised in Chapter Four. Unlike Means-End, survey based methods do not provide an understanding of how

identified values are related to consumption decisions, missing the linkages between values and consumer choice behaviour. Means-End also addresses the issue of situational considerations in value research. It has been noted that the particular values that influence behaviour may be completely different in different situations (Walker and Olsen 1991), and Means-End chains allow an investigation of product/value links within a given situation. Gutman (1990), compared the values elicited by a group of consumers using Means-End analysis, and those chosen when the same respondents were presented with the global LOV values in relation to beverage choice. He found that the LOV value selected as most important showed little relationship with the situationally elicited value for almost half the respondents. Gutman's findings highlight the importance of eliciting values for particular consumption situations, not in general, if we are to understand consumer behaviour. Another of laddering's strengths over deductive predetermined measures is that it allows the consumer to express and define this association in their own terms. In this sense, laddering represents a more suitable method for cross-cultural application than culturally predetermined value scales. Means-End is also clearly aligned with the interpretivist nature of the research approach.

## **Part Two – Methodology**

### **6.7 Methodology Design**

This section will focus on the practical aspects of methodology design and implementation.

#### **6.7.1 Sample**

Having determined the most appropriate methodological approach, the first question of methodology design is the issue of sampling. NZTB recognises three major travel segments for the Japanese market; FIT (23%), Semi Independent (29%), and Package Tourist (36%) (NZTB International Visitor Survey 2006). Sample selection was based on maximum variation, in order to gain both depth and breadth of understanding, for this reason it was decided to focus on the FIT (represented by backpackers) and package tour segments, in order to understand the values represented by the travellers at the 'extreme' ends of travel style. In order to gather informants from a range of backgrounds it was decided to conduct interviews in Queenstown airport (capturing package tourists and honeymooners) and at Dunedin and Queenstown backpackers (capturing FIT, young, long-stay and/or independent travellers).

Sample size was not determined in advance as redundancy was regarded as the most suitable criterion for sample size. “It is usual to find that a dozen or so interviews, if properly selected, will exhaust most available information; to include as many as twenty will surely reach well beyond the point of redundancy” (Lincoln and Guba 1985:235). The sample sizes employed in studies using the Means-End methodology in tourism were reviewed; whilst those employing hard laddering techniques, or interested in cognitive structures included samples as large as forty to 270 (Frauman and Cunningham 2001, Klenosky, Gengler and Mulvey 1993, McIntosh and Prentice 2000), other studies focused on the values identified themselves and using soft laddering techniques had much smaller samples of twelve to sixteen (Klenosky, Frauman, Norman and Gengler 1998, Thyne and Lawson 2001, Thyne 2001). In the earlier phase of the research, when qualitative interviews were conducted at Narita airport in advance of survey question development, a degree of repetition was found after twelve interviews (Gnoth and Watkins 2002). Thus while the sample size was not determined in advance, a minimum of twelve interviews were planned.

### **6.7.2 Instrumentation**

The instrument of choice in interpretivist methodology is the human instrument, for this research it was decided to use a team approach to the methodology. It was considered to be of great value to include a Japanese national in the team in order to give a different value perspective (the ability to appreciate if not share the values of the sample); to gain the benefit of multiple skills and background disciplines; to allow for internal checks in the course of the research; to make the context as natural as possible; and to allow the informants to express themselves in their own language and from their own cultural perspective. As defined by Lincoln and Guba (1985), an informant is a committed and accepted member within the local context who also acts as a member of the inquiry team, providing inside views of norms, attitudes, constructions, processes and culture. The advantage of using a native person in the research team was also to short-cut social and cultural differences and gatekeepers, and to help in building trust with respondents. Research has shown that people better reflect their cultural values and assumptions when they respond in their native language (Schaffer and Riordan 2003); and interviews between ethnically similar interviewers and respondents produce higher quality responses than interviews between those of dissimilar ethnicity (Webster 1996).

Fumie Yokoi was chosen from three applicants for the position of research assistant based on her personable nature, her long and highly relevant experience as a Japanese tour guide in NZ (five years), her marketing background (currently completing an MBA), and her strong bilingual and bicultural background (11 years in NZ). Fumie was well briefed on the purpose of the research and given training in the laddering technique. It was decided that Fumie would conduct the interviews to gain the benefits of using a native speaking informant discussed above, however the researcher (who is fluent in Japanese) would also be present and add any further questions or seek clarification towards the end of the interviews.

### **6.7.3 Data collection and recording modes**

Three key criteria need to be considered in the choice of interviewing style: the degree of structure, depth, and overt/covert (Lincoln and Guba 1985). A semi-structured laddering interview was deemed to be the most appropriate interview style as the research question was clearly formulated and the respondent was to be encouraged to answer in terms of the Means-End framework; however it was important that the respondents also had some influence over the course of the conversation. It was decided respondents were to be fully informed of the interview process and the purpose of the interview. The relationship between researcher and respondent most suitable to the research was the depth interview (Lincoln and Guba 1985), where interviewer and respondent are positioned as peers. For the purposes of reproducing the data exactly the use of audio tapes (with respondent's consent) was considered important. The team approach also allowed detailed field notes to be taken during interviews. This would be of benefit in case of technical difficulties, for ready access in order to return to earlier points, to refresh memory, and to record insights.

Grunert and Grunert (1995) distinguish between 'hard' and 'soft' laddering techniques. In 'soft' laddering techniques the natural flow of speech of the respondents is restricted as little as possible; in contrast, 'hard' laddering refers to interview and data collection techniques where the respondent is forced to produce ladders one by one, and to give answers in such a way that the sequence of the answers reflects increasing levels of abstraction. They propose softer methods whenever the respondent's cognitive structure is very elaborate, due to high involvement and much experience. Given the high involvement nature of the tourism context and the researchers' interest in revealing the underlying values for motivation themselves rather than the consumers cognitive structure, a soft laddering approach was employed.

#### **6.7.4 Data analysis procedures**

The major task of transcribing and analysing was left until returning from the field; however, some analysis in the form of peer debriefing and the revision of field notes was planned after each interview to allow for the emergence of theory and the re-focusing of future interviews in light of findings.

#### **6.7.5 Logistics**

The research was carried out over the period of 21st June to 2nd July 2004, at the peak of the winter tourist season. It was decided to do some preliminary interviews in Dunedin, in order for Fumie to gain some experience in the laddering technique. Several backpackers in Dunedin were contacted and agreed to the researchers visiting; however, at the time of visiting only one hostel had Japanese guests, resulting in three interviews.

The decision to conduct the interviews in Queenstown was based on the popularity of the town for tourists, and its use as a base for a range of tourist activities including skiing, adventure, cultural, and scenic tourism. A list of backpacker accommodation in Queenstown was established; the researcher called and asked to speak with the manager of the accommodation, explaining the purpose of the research, the desire to approach backpackers in an environment that would enable conversation, and requested permission to approach guests in communal areas such as kitchens and TV rooms. Of an initial list of twelve backpackers, seven agreed to participate and were sent a letter outlining the research and the contact details of the researcher. The researcher also contacted the manager of Queenstown International Airport and requested permission to approach passengers waiting in the departure lounge.

### **6.8 Data Collection**

#### **Backpackers**

While each organisation had been contacted in advance, it was often front office staff that were encountered at each site who acted as gatekeepers. Copies of email contact with the manager were useful in cases where staff were unsure; however, in most cases staff were more than helpful in informing the researchers how many Japanese guests were staying and offering entry to communal areas. In some locations there were no Japanese guests present and the majority of interviews were done in four key backpackers. The researchers sat in kitchen areas and approached people Fumie identified as being Japanese. In most cases



respondents readily agreed to the interviews. Often respondents themselves were key gatekeepers and having done the interview themselves would recruit other Japanese people they knew of at the hostel.

### **Airport**

In the case of the airport, unexpectedly, it was the Japanese tour guides that acted as gatekeepers and when approached and asked if they would mention the research to their clients were less than willing to do so. Fumie's experience as a tour guide was invaluable in this situation; she explained that guides were probably wary of suggesting the idea for fear clients would feel obliged but resentful, and that it would affect their overall assessment of the tour company/experience. In some instances Fumie was familiar with the guides from working with them in the past and approached them with success; in other cases it was felt best to avoid the guides and wait for them to either leave the airport or move away from the group before approaching potential respondents directly. Fumie approached individuals or couples explaining briefly the nature of the research and asking if they would be prepared to participate. In some cases respondents were concerned about time and declined the interview, but in most cases were happy to oblige and as with the backpackers were then happy to 'recruit' others in their group if there was time.

#### **6.8.1 Interview Process**

In each interview situation fully informed consent was formally obtained. Fumie introduced herself, the researcher, the purpose of the research, and offered respondents a copy of the researcher's business card (in line with the cultural practice of exchanging *meishi*). Respondents were then given a cover letter clearly stating the purpose of the inquiry and how information was to be gathered and used; giving the assurance of confidentiality; explaining who would have access to raw data; and explaining to the respondent that they were free to withdraw at any time without justifying that decision. Respondents were then given a form highlighting the main points in the letter and asked to sign their consent (see Appendix Two). Respondents were also asked if they were comfortable with a small microphone and tape recorder being used, and it was explained that only the two researchers present would have access to the tapes. In all but two of the fourteen cases (Cases Nine and Ten) respondents were happy to attach the microphone.

Building and maintaining trust is vital to the interview process; while trust does not determine truthful and forthcoming information, it certainly makes it more likely. Building trust is a developmental process beginning with the initial approach and built with each respondent (Lincoln and Guba 1985). Fumie's personable nature made her immediately popular with respondents, her youth encouraged positive interactions and a sense of identification with backpackers; and her long experience and familiarity in the role of tour guide also made her popular with the older package tourists. The Japanese language is very formalised and Fumie used the appropriate level of speech to establish trust and credibility early in the interview.

The interviews began with some general questions regarding purpose of travel, time in NZ and past travel experience. Once participants were at ease, Fumie guided discussion loosely around four topic areas: reason for NZ as a destination choice, activity choices, accommodation choices, and transportation choices. The direct elicitation technique was used to initiate the laddering technique. Fumie began with a behaviour/decision, i.e. "why did you choose NZ as your destination?" She then selected/ picked up on the key attribute mentioned for the destination and using the laddering procedure asked the respondent "why is that attribute important or desirable to you?" The response given was then used for the next "why is that important to you" question. And so on. This process of eliciting attributes, and laddering from those attributes, was then repeated using the remaining topics. Interviews were conducted by Fumie, with the researcher present and taking notes or adding questions towards the end of the interview. This allowed for immediate validation checks at the completion of each interview.

Respondents were positioned as the expert and Fumie acted as a facilitator rather than a 'questioner'. Fumie worked to create a sense of involvement and interest, and instil confidence in the respondent. Some version of the "why is that important to you" question was used to keep drawing respondents deeper into the underlying values for their choices. Fumie followed up on issues raised and was flexible with regard to structure, but maintained a focus on moving the respondent up the ladder toward more abstract meanings. If respondents were having difficulty Fumie changed or rephrased the question in a situation context, or made a mental note and returned to the issue later.

Fourteen in-depth laddering interviews were carried out, seven at backpacker locations and seven with respondents at the airport. During the course of the fourteen interviews, the

researchers found a degree of repetition in the information obtained, confirming that a degree of saturation had been reached.

All the interviews were taped and later transcribed and translated into English by Fumie, the transcripts and translations were checked for accuracy by the researcher.

### **6.9 Assessment of Rigor**

Prolonged engagement demands sufficient time to learn about the culture and context. Both researchers can be considered to be thoroughly familiar both with the culture and the context; Fumie as a Japanese national with nine years experience in the NZ tourism industry; and the researcher through over ten years' study of the Japanese language and culture, three years living in Japan, and experience working in the tourism industry both in NZ and Japan. Triangulation was addressed through the use of multiple investigators; peer debriefing and checks with Fumie as a member of the stakeholder group were also ways of establishing credibility. In interpretivist research it is the responsibility of the researcher to provide sufficient descriptive data to allow future researchers to determine the applicability and transferability of research finding. Interviews were both recorded verbatim and detailed field notes were made, allowing for depth of descriptive data. Consistency/dependability was also addressed through the use of two researchers; immediately after interviews the field notes were discussed between Fumie and the researcher. Meanings were discussed, checked and rechecked at every point in the research process, at the time of the interview, when the interviews were transcribed, translated, and analysed. Interpretation was enhanced through the combination of having both a native interviewer and an observer/notetaker. Neutrality/confirmability (determining that data was reliable, factual and confirmable) was addressed through the audit trail which included raw data in the form of tapes, process and personal notes, and also methodology development information including pilot forms, schedules, observations, etcetera. The criterion of a natural setting was also addressed; respondents were observed and interviewed in the course of their normal travel experience. The related criterion of using the language and terminology of the respondents was also clearly addressed in the research design.

### **6.10 Data Analysis/Coding**

Consistent with the interpretivist paradigm the analysis approach was inductive, identifying emergent categories from the data itself rather than using data to confirm or falsify theoretical

hypotheses. The analysis was also subjective rather than objective; the goal was to reconstruct the categories used by subjects to conceptualise their own experiences and world-view, rather than apply conceptual categories and explanatory relationships to the analysis of the data (Lincoln and Guba 1985).

The analysis of the data was done purely by hand. It was decided not to use computer assisted analysis such as that offered by Nudist or Nvivo, as, consistent with the research paradigm, it was considered more important to work with the data in the language of the respondent. This enhanced the thick description enabled by detailed multiple listening and reading of the raw data, rather than a non-contextualised computer analysis.

Initial ladders were constructed at the time of each interview. After the completion of the interviews, each tape was listened to and ladders constructed. These were then compared to the original ladder. Once the tapes had been transcribed and translated the ladders were checked once again to ensure all the important information was summarised. For each respondent three or four ladders were constructed (depending on whether transport and accommodation were dealt with together), beginning with the direct answer to the question, then each subsequent and more abstract level until a value was elicited.

Though ladders were useful as a diagrammatic way of showing the increasingly abstract link between behavioural decisions and core values, this is where the Means-End analysis ended. The objective of the research was not to investigate the cognitive structure of respondents' answers and for this reason it was not considered beneficial to construct a hierarchal values map. The research was interested in the core values identified, rather than the relationships between levels and/or chains across respondents.

Cases were read and re-read in order to categorise, abstract, compare, and integrate the data. Data was analyzed horizontally (grouping indicators of values) and vertically (grouping cases) (Spiggle 1994). Tabulations by values (i.e., for each value all incidents that represent the value across cases), and tabulations by case (i.e., for each respondent all incidents that represent the value construct) were used to organise the data. Further analysis collated and compared demographic data such as age, education, wage and occupation with the values mentioned. General observations and themes emerging from the interviews were also recorded throughout the research process. Attention then turned to analysing the values found

– the history of the word, its definition in Japanese, related concepts and possible English translations.

### **6.11 Conclusion**

This chapter has discussed the two dominant approaches to research in the social sciences and provided further detail of the interpretivist paradigm adopted. Part One of this chapter discusses the focus of the inquiry, the fit of the interpretive paradigm to the research question, and the fit of Means-End methodology to the chosen paradigm. Part Two of this chapter outlines the specific research methods used in data collection and analysis, and highlights the emphasis given to issues of rigor in this research thesis. Chapter Seven will present the results of the data analysis and discuss their implications.

## **Chapter Seven – Results and Discussion**

### **Part One - Results**

#### **7.1 Introduction**

The primary objective of this research is to identify and understand the values relevant to Japanese tourism behaviour, and investigate how these values impact on tourism behaviour and decision choices for Japanese tourists in New Zealand. Results of the primary research are presented in this chapter, together with a discussion of their meaning in the context of Japanese culture and literature.

This chapter presents each of the fourteen cases and the summary ladders for each informant. From the analysis of the cases a list of relevant values is identified and their meaning in the travel context discussed. Five overall themes were identified in the analysis of the data; these are discussed in Part Two. An initial model, linking the five key research themes to the values identified and the related travel behaviour, is then presented.

#### **7.2 Sample Profile**

The sample included four male and ten female informants ranging in age from twenty to seventy. Six respondents had university level education, including one person with a masters level degree. Two respondents were college graduates, which typically in Japan is a two year industry-relevant qualification similar to polytechnics in NZ. Three respondents had high school education and the remainder chose not to disclose their level of education. Two respondents listed their occupation as teachers; two others specified their type of work, while the remainder were either unemployed, or classified themselves as office workers, a generic term used in Japan to indicate white collar/company employment. Income was a sensitive issue and the majority of respondents chose not to answer this question, for those that did, the income ranged from 2,500,000 to 6,000,000 yen (it was not indicated whether these figures included bonuses). Cases were selected purposefully to represent variation in travel style and there is a clear distinction shown between independent travellers, honeymooners, and older package tourists in terms of travel companions.

**Table 7****Sample Profile**

Case No.	Age	Education	Occupation	Income	Purpose of travel	Style of Travel
1	35-40	University graduate	Teacher	-	To find employment	Individual
2	25-30	High school graduate	Department store worker	-	Working Holiday	Individual
3	28	High School graduate	Computer related work	4,000,000 yen	To snow board	Individual
4	29	College Graduate	Special needs teacher	3,000,000 yen	Working holiday	Individual
5	25	College Graduate	Office worker	2,500,000 yen	Working Holiday	Individual
6	20	High School Graduate	Unemployed	-	Working Holiday	Individual
7	22	University graduate	Student	-	Working Holiday	Individual
8	39	University graduate	Office worker	-	Sightseeing	With a friend
9	29	University graduate	Student	0 yen	Honeymoon	With husband
10	31	Masters degree	Office worker	6,000,000 yen	Honeymoon	With wife
11	-	University graduate	Office worker	4,000,000 yen	Honeymoon	With wife
12	58	High School	Housewife	-	Sightseeing	Group
13	70	-	Housewife	-	Sightseeing	Group
14	55	-	Office worker	-	Sightseeing	With friend

NB: The average Japanese wage is 4,000,000 yen (Japanese National Tax Agency 2005)

### 7.3 The Cases

This section describes each of the fourteen cases, their travel behaviour decisions and the values they identified as being important in those decisions. For each respondent a summary diagram representing the ladders emerging for the Means-End interview is presented. All end values presented in the summary ladders were elicited directly from the respondent unless otherwise indicated.

#### Backpacker Respondents

##### *Case One*

Respondent One was a female aged in her late thirties who was looking to settle and work full time in Dunedin. She had travelled widely in Australia, the USA and Canada. She had been to Dunedin before and established a strong relationship with the owners of the backpackers saying “they are so nice, like my parents”. Her reason for returning to NZ, and particularly Dunedin, were the people, and the feeling of close human relationships she experienced. “I walk in the morning here, people say ‘good morning’ to me, and that makes me feel good and gives me energy for the whole day...communication with people and smiling at each other, these kinds of things give me energy”. She had chosen the backpackers, not only because of her relationship with the owners but because she felt staying at a backpackers allowed her to “expand my horizons and gain knowledge and influence my human nature as well”. While not particularly interested in commercial tourism activities the respondent enjoyed walking and light trekking in the mountains because of the opportunity to stop and talk to people and to slow down the pace of life “I can spend my time slowly and usefully”.

Key themes emerging from this case were feelings of alienation in Japanese society – the respondent said she could not feel the same human warmth in large Japanese cities like Tokyo or Osaka as she did in NZ; and the idea that life in Japan is stressful and busy: “everything is moving fast in Japan, so by slowing down my pace I can adjust it to suit the environment (in NZ)”

The respondent also expressed disillusionment with Japan, and had left her job as a teacher as a result: “I thought the way of teaching students in junior high school and high school became like the army, so I felt stressed when I worked in that situation. I felt stressed and was disappointed with the system in Japan. I would like to educate children, not train and discipline them”.



<b>Case One</b>	
<b>Destination Choice</b>	<b>Destination Choice (2)</b>
<p>Been here before</p> <p>▼</p> <p>I thought the people were so beautiful... I am a sociologist, so by meeting people from many countries I can expand my knowledge and my own humanity. I can also learn English by listening to different accents.</p> <p>▼</p> <p><i>Chishiki (knowledge)</i></p>	<p>Dunedin</p> <p>▼</p> <p>When I walk here in the morning people say 'good morning to me' and that changes my mood for the day... it gives me energy</p> <p>▼</p> <p><i>Fureai (human relationships)</i></p>
<b>Activity</b>	<b>Accommodation Choice</b>
<p>Trekking</p> <p>▼</p> <p>I feel <i>anshin</i> in the mountains</p> <p>▼</p> <p>When I see people I can say hi... you can't walk fast in the mountains so I slow down and enjoy looking at things, things I can't see in Japan. I can spend my time slowly... Everything in Japan moves fast, by slowing down my pace I can adjust it to suit the environment</p> <p>▼</p> <p><i>Anshin (relaxation)</i></p>	<p>Backpackers</p> <p>▼</p> <p>This hostel is cozy and friendly and everyone can relax and stay a long time... the atmosphere is very special</p> <p>▼</p> <p><i>Fureai (human relationships)</i></p>

*Case Two*

Respondent Two was a male aged twenty-eight years. He had travelled to NZ alone to snowboard. He had five weeks in NZ, and had spent the first three weeks travelling around and was now in Queenstown to snowboard for the remainder of his time. Previous travel experiences had been to Canada for a holiday and Malaysia for a business trip. He had chosen to come to NZ as the season was opposite to Japan, allowing him to snowboard during 'summer'. He saw snowboarding and travel as a hobby and a way of relieving stress from a busy working life. "I have to change my pace of life, otherwise I don't feel like doing anything...when I work I tend to think and work too hard... My mind only works in one way, and I need to freshen it up". Travel was also motivated by a desire to try new things and have fun. He was travelling by rental car because it was convenient but more importantly offered him freedom: "I do not like being told what to do and being restricted by anything". The respondent was staying in a backpackers when he met the researchers but had previously been staying in motels and was surprised that backpacker accommodation did not have T.V's and refrigerators in each room. He preferred the privacy of motel accommodation, saying: "I would rather not show off my personal life to others... I don't know. I am afraid of people. I am afraid of showing myself to others".

Again the theme of escape from a busy Japan was evident in this case, as well as a desire for freedom, and the implication of Japanese society being restrictive.

<b>Case Two</b>	
<b>Destination Choice</b>	<b>Activity</b>
<p>To snowboard</p> <p>▼</p> <p>It is my hobby and I can get rid of stress</p> <p>▼</p> <p>I need to change my mood, otherwise it's like a dead end... At work and things I tend to work too hard and only end up going one way</p> <p>▼</p> <p>I need to try something new and have fun and then try again</p> <p>▼</p> <p><i>Refureshu (refresh)</i></p>	<p>Wanted to try sea kayaking</p> <p>▼</p> <p>I can see things from a different perspective... you can see animals you don't usually see</p> <p>▼</p> <p>Experience something new, something I can't do in Japan</p> <p>▼</p> <p><i>Atarashii taiken (try new things)</i></p>
<b>Transport</b>	<b>Accommodation</b>
<p>Rental Car</p> <p>▼</p> <p>I have been driving around, going around and looking at various places... a rental car means I can move around freely</p> <p>▼</p> <p>I really hate being tied down</p> <p>▼</p> <p><i>Jiyū (freedom)</i></p>	<p>Motel</p> <p>▼</p> <p>You have your own facilities in your own room</p> <p>▼</p> <p>I don't want to show too much of myself to others... I am afraid of showing myself to other people</p> <p>▼</p> <p><i>Puraibashii (privacy)</i></p>

*Case Three*

Respondent Three was aged in her late twenties and was travelling on a working holiday visa. She had been in NZ for six months, travelling first in the North Island then to the South. She had travelled to ten countries in Asia and Africa for short diving trips but this was her first long overseas trip. She had chosen NZ because of the working holiday visa opportunity. It appealed to her most out of the options for working holiday visas (Canada and Australia), as it was a similar size to Japan and “had good weather”. In Japan she worked in a department store and had been thinking about coming to NZ for two years; she was in a middle position between top management and new employees and felt ‘something was missing’. “I really enjoyed my work, but I was not able to satisfy myself, something was missing”. She finally decided she would never regret the decision to come to NZ and needed to change her pace of life. In NZ she enjoyed walking in natural environments: “the air is so tasty, and the water is so beautiful. It makes me happy”. Nature was important to her: “it makes me happy, I do not have to be given anything at all. Just being in nature makes me happy, such as fresh air and seeing beautiful water...I stand alone without thinking anything and walking...I do not have to think about unnecessary things...I am quite happy being there”. She chose to stay in backpackers because they were fun and offered freedom: “I can do what I want anytime. For example, I can cook and eat anytime I want and I can have a shower anytime without any hassle...if I am restricted to do anything I will go back to Japan”. She talked about the restrictive nature of Japanese society: “We tend to care about what other people think about us (in Japan). If you look at mountains and do nothing for two hours people will think you are a silly person”. She travelled by bus for the convenience and price: “the reason is that it is the cheapest option and the easiest way for me because they take me to places I am not familiar with. Thus it is convenient and I do not have to worry about where I should go, the bus driver knows the places to visit, so it’s convenient for me”. She preferred to travel alone: “I think I will have more chances to talk to many people rather than travelling with a friend. If we travel together we will be in our own world all the time. Travelling alone allows me to talk to many people and I think that’s good for me”.

Again in this case themes of escape, dissatisfaction with work in Japan, and the restrictive nature of Japanese society were clear.

<b>Case Three</b>	
<b>Destination Choice</b>	<b>Activity</b>
<p>Working Holiday Visa</p> <p>▼</p> <p>Wanted to change my lifestyle</p> <p>▼</p> <p>I thought about whether I should continue my job or quit and go on a working holiday. I didn't want regrets so I made the choice to come</p> <p>▼</p> <p><i>Fulfillment (implied)</i></p>	<p>I enjoy being in the mountains</p> <p>▼</p> <p>The air is so nice, and the water is so beautiful. It makes me happy</p> <p>▼</p> <p>Just being there makes me happy. I do not have to be given anything at all. Just the mountains, breezing fresh air, looking at water, just that makes me happy</p> <p>▼</p> <p><i>Shiawase ni naru (happiness)</i></p>
<b>Accommodation</b>	<b>Transport</b>
<p>Backpackers</p> <p>▼</p> <p>I can do what I like when I like. I can cook and eat when I want to and I can have a shower when I like</p> <p>▼</p> <p><i>Jiyū, Kaihōkan (freedom)</i></p>	<p>Bus</p> <p>▼</p> <p>It is convenient and cheap. I use buses because they are cheap, and when I don't know anything it will take me to the tourist spots, so it's convenient, and if it want to go to small places I can try with</p> <p>Atomic (shuttles)</p> <p>▼</p> <p><i>Benri (convenience)</i></p>

### *Case Four*

Respondent Four was a twenty-nine year old special needs teacher in NZ on a working holiday visa, travelling and learning English. She was travelling alone and had spent two months in Auckland staying with a host family and attending English school. While it was her first time to NZ, the respondent had been to Canada and America to snowboard, and Malaysia and Saipan for scuba diving. She chose to come to NZ on this occasion as it was easy to obtain a visa and because of the abundant nature, which allowed her to snowboard and trek. In NZ she had been trekking; she enjoyed the views, and talking to people on the track allowed her to practice her English. She felt learning English in daily conversation rather than purely through study was important, and travelling and trekking allowed her this opportunity. Learning English was an important motivation for the trip and was seen as a means to broader horizons and new experiences. "If I can speak English better, I can travel more freely and try new activities". She also saw English ability as important for her future. Her desire to see and experience new things was related to personal satisfaction: "I want to experience many things, I want to have various experiences. You only live once...I want to do various things, see various things, and have lots of experiences, for my own satisfaction I guess." The respondent had purchased a car before leaving Auckland as she felt it allowed her to access many places, find reasonably priced accommodation in Holiday Parks, and travel when and where she wanted; giving her a sense of convenience and freedom. "I can travel where I like when I like...I can stay in one place for a long time without worrying about the time". She had been staying mainly at backpackers during her time travelling because it was cheap and for the fun and enjoyment of contact with other travellers. "At first I stayed in backpackers because of the price, but travelling from Auckland I was able to meet many people, talk to them and exchange information. It was fun...I enjoyed listening to other peoples' stories of travel, exchanging information. I enjoy talking to various people". She enjoyed snowboarding and scuba diving as they made her 'feel good', it was fun and gave her a sense of freedom, "I cannot experience the same feeling in daily life...freedom?"

This respondent valued freedom and adventure. After the interview was complete she talked to the researchers about opportunities to observe special needs teaching in NZ in order to compare it to Japan, as she had heard about NZ's 'mainstreaming' policy and liked the idea, indicating that there were things about the Japanese system she did not like.

<b>Case Four</b>	
<b>Destination</b>	<b>Activity</b>
<p>Working Holiday</p> <p>▼</p> <p>It is easy to obtain a working holiday visa and there is lots of nature... I especially wanted to go snowboarding and trekking, NZ has got that sort of nature</p> <p>▼</p> <p>(snowboarding and trekking) its something about the feeling, I can't explain it well but it feels good...I cannot experience the same feeling in daily life...freedom</p> <p>▼</p> <p><i>Jiyū (freedom)</i></p>	<p>Scuba diving</p> <p>▼</p> <p>The sea is so beautiful, I would like to get to various countries, the sea is different in every country, I'd like to see it</p> <p>▼</p> <p>I want to have various experiences... you only live once... I want to see various things, have lots of experiences, for my own satisfaction I guess</p> <p>▼</p> <p><i>Manzoku (satisfaction)</i></p>
<b>Accommodation</b>	<b>Transport</b>
<p>Backpackers</p> <p>▼</p> <p>I enjoy listening to other peoples' stories of travel, exchanging information. I enjoyed talking to various people... it is fun</p> <p>▼</p> <p><i>Fureai (human relationships)</i></p>	<p>Bought a car</p> <p>▼</p> <p>I can travel where I like when I like... I can stay in one place looking for a long time without worrying about the time. Travelling by bus you must go at a certain time</p> <p>▼</p> <p><i>Jiyū (freedom)</i></p>

### *Case Five*

Respondent Five was an office worker with a college education who was travelling alone on a working holiday visa. She was twenty-five years old. She had been in NZ for six weeks and had come to study English and snowboard. She had studied English and done a homestay in Christchurch for three weeks before travelling to Queenstown. When asked why she liked snowboarding she responded that it was fashionable, and that a sense of belonging was what had brought her to the sport originally, but as she grew to enjoy it she became more interested in improving and being “better than others”. She put this down to “a sense of superiority? I want to show off, to be better than my friends... I want to stand out on the ski field”. She later related this to self-satisfaction. She had booked her accommodation and home stay before her visit as this made her feel safe. “For peace of mind I booked my place and homestay before I visited...”. She thought this was especially important because her English was not very good and she was travelling alone. Experiencing new things and gaining new knowledge were important motivations to travel. Learning English was also a key reason for her trip to NZ. In Queenstown she was staying in backpackers for the low price and to communicate with “many different people”; she also thought it was a great situation to learn English. “In a situation where I do not have to speak English I will gladly escape it, but if I am one-on-one in the room or in the kitchen I have to speak English and I make an effort, even if I have to use a dictionary”. Learning English was important for human contact; she also believed it expanded her horizons by allowing her to travel more and meet new friends. It was also related to security: “I can make many friends and I won’t get in any trouble. It is security”. English ability also allowed more opportunities in the future. The respondent was travelling by bus as it was the cheapest option and the safest: “I thought driving in an unknown country was a dangerous thing to do...I do not have any risk of getting lost when I am on the bus”.

The term *medachitai* or wanting to stand out was a theme in this interview. While security was clearly important to this respondent, she was also seeking new experiences and broader horizons.



<b>Case Five</b>	
<b>Destination</b>	<b>Activity</b>
<p>To learn English</p> <p>▼</p> <p>English is the universal language... I thought it might be useful</p> <p>▼</p> <p>Finding a job is important but I want to expand my horizons inside... travelling, talking to people</p> <p>▼</p> <p><i>Sekai ga hirogaru (expand horizons)</i></p>	<p>I wanted to snowboard the whole year and NZ has the opposite season to Japan</p> <p>▼</p> <p>It is fashionable (snowboarding), that was the main reason for a start but after a while I realised I really enjoyed it and I wanted to improve ... I wanted to get better, to be better than other people</p> <p>▼</p> <p>I wanted to stand out</p> <p>▼</p> <p><i>Jibun no manzoku (self satisfaction)</i></p>
<b>Accommodation</b>	<b>Transport</b>
<p>Homestay</p> <p>▼</p> <p>For peace of mind I booked my homestay before I visited</p> <p>▼</p> <p><i>Safety (anzen)</i></p> <p><b>Accommodation (2)</b></p> <p>Backpackers</p> <p>▼</p> <p><i>Fureai (human relationships)</i></p>	<p>Bus</p> <p>▼</p> <p>I thought driving in an unknown country was a dangerous thing to do... I do not have the risk of getting lost when I am on the bus... travelling on my own it has to be by bus</p> <p>▼</p> <p><i>Anzen (safety)</i></p>

**Case Six**

Respondent Six was a twenty year old male who had come to NZ alone on a working holiday. The respondent had previously studied English in Canada for nine months but had decided to come to NZ because it was easier to get a working holiday visa. He had been at English school for three months elsewhere in NZ before coming to Queenstown to look for a job as he felt this was a better way to learn practical English. His dream was to become an interpreter or translator in the future. He related his desire to learn English to knowledge and personal satisfaction. He chose to stay at a backpackers because he thought it might be possible to find a job cleaning there in return for free board. He was travelling by bus as this was the most convenient. While in Queenstown he was going short skiing because “snowboarding is so popular and I do not like trendy stuff... I do not like doing the same thing as other people... I want to be a unique person”. When probed he related this to self-respect.

This respondent was motivated by practical concerns and could not be drawn to deeper-level value motivations in some instances. However, he was clearly driven by personal values of satisfaction and again raised the theme of *Medachitai*, or wanting to stand out from the crowd.

<b>Case Six</b>	
<b>Destination</b>	<b>Activity</b>
<p>To find a job, I chose NZ because I was able to get the working holiday visa within one week</p> <p style="text-align: center;">▼</p> <p>My dream is to become an interpreter or translator, so I have been studying to qualify for it. I thought I would be able to learn practical English if I got a job in a place that uses English</p> <p style="text-align: center;">▼</p> <p>English is very interesting to me, and language differences, and cultural differences, it's very interesting</p> <p style="text-align: center;">▼</p> <p><i>Jibun no manzoku (personal satisfaction)</i></p>	<p>Short skiing</p> <p style="text-align: center;">▼</p> <p>Snowboarding is so popular, I don't like things that are popular... I don't like doing the same things as other people</p> <p style="text-align: center;">▼</p> <p>I want to be a unique person... I want to be myself</p> <p style="text-align: center;">▼</p> <p>Maybe to respect myself, I don't know</p> <p style="text-align: center;">▼</p> <p><i>Jisonshin (self respect)</i></p>
<b>Accommodation</b>	<b>Transportation</b>
<p style="text-align: center;">Backpacker</p> <p style="text-align: center;">▼</p> <p>It was cheap and I wanted to work here</p>	<p style="text-align: center;">Bus</p> <p style="text-align: center;">▼</p> <p style="text-align: center;">Convenient</p>

### *Case Seven*

Respondent Seven had come to NZ alone on a working holiday visa. She was twenty-two, had recently graduated from university and was going to become a teacher. She had come to NZ because she felt she had only experienced school life and that teachers should have wider experiences to share with their students. She chose NZ as a destination after having done some research through guide books and the NZ Association in Sapporo. She had an image of NZ as being safe and the people friendly towards Japanese. Her top priority was having contact with New Zealanders. Having just arrived she had not done many activities but was planning to hike and paraglide the following day. Everyone had recommended bungy jumping and skydiving but she felt paragliding would be less scary, safer, and allow her to view the scenery in a way she could only in NZ. She also wanted to ‘fly’ as a new, special experience – for a sense of achievement. She had been trekking since arriving in NZ, which allowed her to walk at her own pace and gave her a sense of achievement, freedom and therefore satisfaction. “I had never been trekking in Japan. I played volleyball and the most important part of the game was winning. You have to learn discipline and rules in Japanese society and you have to compete with each other to survive. However, hiking has a completely different concept. It is not necessary to compete with each other, and you can walk at your own pace. When you reach the top it makes you feel great, that you achieved something. For example, I walked up Queenstown hill without using the gondola, that made me feel great, even though it was a hard walk”. She travelled by plane straight to Queenstown rather than by bus as she thought it was the safest and fastest option. She also mentioned choosing Kiwi Experience as a form of transport in the future due to the price and ability to meet many people. She had chosen to stay in backpacker accommodation to speak English, make friends and gain knowledge. She heard that Japanese often stayed at YHA hostels so had deliberately chosen a different backpackers. “I mean I want to obtain not only English knowledge but also other people’s thoughts. I do not care which the best place to go is (most popular place for Japanese), I would rather improve my knowledge by talking with many people”.

This respondent focused on a desire for human contact, new experiences, knowledge and a sense of achievement. This interview again raised the theme of an overly competitive and stressful Japan.

<b>Case Seven</b>	
<b>Destination</b>	<b>Activity</b>
<p>I read various guide books - according to them New Zealand has lots of countryside and the people are friendly. Before I came here I went to the NZ Association in Sapporo and I learnt English from a kiwi; he was a very nice person, so I decided to come here</p> <p style="text-align: center;">▼</p> <p>The people are friendly and for example New Zealanders and Australians are friendly to Japan, I have the image Europe is not.</p> <p style="text-align: center;">▼</p> <p>Contact with New Zealanders</p> <p style="text-align: center;">▼</p> <p><i>Fureai (human relationships)</i></p>	<p style="text-align: center;">Paragliding</p> <p style="text-align: center;">▼</p> <p>To see the beautiful scenery... and I want to try flying</p> <p style="text-align: center;">▼</p> <p>It is a memory I can only get here</p> <p style="text-align: center;">▼</p> <p><i>Atarashii taiken (new experience)</i></p>

<b>Case Seven (cont...)</b>	
<b>Activity</b>	<b>Transportation</b>
<p style="text-align: center;">Trekking</p> <p style="text-align: center;">▼</p> <p>I have been playing volleyball and the most important thing is winning or losing. In Japanese society you have to learn manners and rules and memorise relationships between seniors and juniors and compete with people, there's lots of competition. Before I came to NZ I had an interest in hiking here; it's not necessary to compete, you can go at your own pace, get a sense of accomplishment...</p> <p style="text-align: center;">▼</p> <p style="text-align: center;"><i>Manzoku (satisfaction)</i></p>	<p style="text-align: center;">Plane</p> <p style="text-align: center;">▼</p> <p>There are many steep hills in NZ and I always get car sick...I thought it was the safest and fastest option for me</p> <p style="text-align: center;">▼</p> <p style="text-align: center;"><i>Anzen (safety)</i></p>
<b>Accommodation</b>	
<p style="text-align: center;">Backpackers</p> <p style="text-align: center;">▼</p> <p>Knowledge, not just English knowledge but by talking to people I want to know what they think and things... I just want to talk to people, to increase my knowledge</p> <p style="text-align: center;">▼</p> <p style="text-align: center;"><i>Chishiki (knowledge)</i></p>	

**Summary of Backpacker Interviews**

A clear theme to emerge from the interviews with respondents in backpacker accommodation was a desire to escape from a busy, restrictive Japan. Three respondents expressed a desire for broader horizons, knowledge and experience, and three also highlighted a strong desire for human contact/relationships. Learning English was important to several respondents who saw it as important for future freedom and opportunities. The theme of *medachitai*, the desire to stand out, to be different, was highlighted by two respondents. Overall the backpackers were independent, future-oriented, strong-minded and sought freedom and independence. They were well travelled and showed distinctive individuality in their decisions and values.

## **Airport Respondents**

### ***Case Eight***

Respondent Eight was a thirty-nine year old office worker with a university-level education who had travelled to NZ with a friend for eight days sightseeing. Her trip was motivated by the movie ‘Lord of the Rings’. She thought the movie was excellent and had found the scenery in NZ to be exactly how she imagined it after watching the film. She said being in the location where the movie was made made her feel happy, like she was being “dragged into the movie world...It impressed me so much, because a famous movie star was standing here and they acted, and I was standing in the same location...I wanted to experience the kind of scenery they saw when they acted in the movie...It took me into my favourite movie world...I will see the movie again when I go back to Japan...I will be able to remember I have been there and I can enjoy the movie from a different point of view”. She tied this experience to a sense of fulfilment. Her first impression of NZ was the natural beauty and the lack of people compared to Japan, “I come from Osaka City, but Osaka is crowded with people and the air is not clean like it is here”. Being in nature made her feel refreshed and offered an escape from daily life: “I guess it makes me feel refreshed, or maybe I can get rid of stress. I can forget busy daily life”. She related this to a sense of freedom and relaxation. Another reason for travel was knowledge and new experiences: “learning different cultures and seeing different scenery is a new experience and an eye-opener for me”. She related travel and nature also to ‘relaxing her heart’ (*kokoro ga yasuragu*) (see Table Eleven p162 for a detailed translation). The respondent had chosen a package tour for safety, but more importantly, the convenience of having someone “look after me... It is convenient for us to be looked after by tour guides, when we are at hotels and doing airport transfers”.

The major theme in this interview was an escape from the reality of everyday life, and the importance of nature for relaxation and being ‘refreshed’. This respondent also raised the theme of *raku* or ‘being looked after’.



<b>Case Eight</b>	
<b>Destination</b>	<b>Destination</b>
<p>Location of <i>Lord of the Rings</i></p> <p>▼</p> <p>To feel like I was entering the world of the movie...to feel as the actors felt</p> <p>▼</p> <p>It made me happy. It took me into my favourite movie. I will see the movie again when I go home and I will be able to think ‘I have been there’ and I can appreciate the movie more deeply</p> <p>▼</p> <p><i>Jyūjitsukan (sense of fulfilment)</i></p>	<p>Beautiful nature is the number one thing...It feels like there are no cities, America feels dirty</p> <p>▼</p> <p>It makes me feel refreshed, like I can get rid of stress. I can forget my busy life</p> <p>▼</p> <p><i>Seishinteki na jiyū (mental freedom)</i></p>
<b>Activity</b>	<b>Travel Style</b>
<p>Sightseeing</p> <p>▼</p> <p>Seeing different scenery every day is a new experience</p> <p>▼</p> <p><i>Kokoro ga yasuragu</i></p>	<p>Package Tour</p> <p>▼</p> <p>It is easy. Its easier having someone do it than doing it yourself. You don’t have to think about anything...checking in and at airport transfers, for all those things its easier if the guide does it for us</p> <p>▼</p> <p><i>Raku (Ease)</i></p>

***Case Nine***

Respondent Nine was a female in her late twenties who was travelling with her husband on their honeymoon. She had recently graduated from university. They had chosen to come to NZ for their honeymoon because of the scenery which was so different to Japan and therefore a new experience. Experiencing NZ's nature made her heart feel relaxed (*kokoro ga yasuragu*). They had been jet boating in Queenstown because they thought it would be a new, fun experience and were motivated by the excitement it offered. They had also been to Milford Sound because of the scenery, which they found to be huge in scale and beautiful. This was related to a feeling of excitement. They had chosen a package tour as it was their first time to NZ and therefore it was 'simple'. It reduced the risk of nuisances and problems and gave them a sense of security and ease (*raku*).

The focus in this interview was on nature and relaxation but also excitement. The themes of security and ease of travel were also brought up by this respondent.

<b>Case Nine</b>	
<b>Destination</b>	<b>Activity</b>
<p>Honeymoon</p> <p>▼</p> <p>Scenery</p> <p>▼</p> <p>It feels different to Japan, it's a new experience</p> <p>▼</p> <p><i>Kokoro ga yasuragu</i></p>	<p>Jet boating</p> <p>▼</p> <p>Interesting/fun. A new experience</p> <p>▼</p> <p><i>Wakuwaku (excitement)</i></p>
<b>Activity</b>	<b>Travel Style</b>
<p>Milford Sound</p> <p>▼</p> <p>Beautiful scenery you can't see in Japan</p> <p>▼</p> <p>The beauty, the huge scale</p> <p>▼</p> <p><i>Kōfun (excitement)</i></p>	<p>Package tour</p> <p>▼</p> <p>Simple</p> <p>▼</p> <p>This is our first time to NZ, so there are no problems, nuisances</p> <p>▼</p> <p><i>Raku (security/ease)</i></p>

**Case Ten**

Respondent Ten was an office worker with masters level education travelling to NZ with his wife on their honeymoon. They had chosen NZ because it offered security, unlike European countries (the implication being security from terrorism and other such dangers). They had done a lot of sightseeing since being in NZ and felt the scenery was so different to Japan and offered relaxation, cleansing of the heart/inner harmony (*kokoro ga arawareru*). They had chosen to travel on a package tour because it allowed them to relax and feel safe.

<b>Case Ten</b>	
<b>Destination</b>	<b>Activity</b>
Honeymoon ▼ It is safer than Europe ▼ <i>Anzen (security)</i>	Nature/scenery ▼ Different to Japan ▼ <i>Kokoro ga arawareru</i>
<b>Travel Style</b>	
Package tour ▼ Relaxation and ease ▼ <i>Anshin (security)</i>	

*Case Eleven*

Respondent Eleven was a man travelling with his wife on their honeymoon. The choice to come to NZ was motivated by movie, book and television images of NZ's nature. He thought the scale of nature was much larger and offered 'something different' to Japan. "I thought Hokkaido was the most beautiful place to visit in Japan. However, NZ's nature, such as the mountains, sea and lakes, they have got something different from Japan and it is so beautiful". He was surprised and moved by it, and related it to a sense of fulfilment, especially the opportunity to see World Heritage sites. He had been jet boating in Queenstown because the water was so clear and made him feel refreshed, but also offered a new experience. He had chosen a package tour for the security of having things organised. "I wanted to book the air tickets only...it would have been OK just for myself, but I have my partner, my wife this time so I thought we wanted to avoid any dangerous accidents and to have accommodation and meals organised. I thought it was the best option for us".

Again this interview raised themes of nature, refreshing oneself and the desire for security and ease.

<b>Case Eleven</b>	
<b>Destination</b>	<b>Activity</b>
<p>Honeymoon</p> <p>▼</p> <p>To see nature</p> <p>▼</p> <p>The scale of nature is different to Japan...</p> <p>The mountains, sea, lakes have got something more (than Japan)</p> <p>▼</p> <p>I felt moved... and surprised...because I haven't seen it before</p> <p>▼</p> <p>It was a sense of achievement being able to see a World Heritage site</p> <p>▼</p> <p><i>Jyūjitsukan (sense of fulfilment)</i></p>	<p>Jet boating</p> <p>▼</p> <p>The water was so clear. It's different to Japan</p> <p>▼</p> <p>I felt refreshed</p> <p>▼</p> <p><i>Keiken (new experience)</i></p>
<b>Travel Style</b>	
<p>Package tour</p> <p>▼</p> <p>I have my wife so I thought we should avoid any danger so I chose to have food and accommodation decided for us.</p> <p>▼</p> <p><i>Anzen (safety)</i></p>	

***Case Twelve***

Respondent Twelve was a fifty-eight year old housewife on a group sightseeing tour. She had come to NZ for the scenery and was moved by the scale of it. “The scenery moved me. We cannot see similar gigantic scenery like that in Japan, it was great...” She related scenery to a sense of well-being and relaxation (*kokoro ga arawareru*), and a slower pace of life. “It made me feel calmer and more composed. Japanese life style is always busy, but NZ’s pace of life is so slow and I am enjoying it...It made me feel happy internally and put my mind at ease”. Since being in NZ she had done a cruise on Milford Sound and was impressed with the scenery, relating it to a sense of inner harmony. The choice to come to NZ was influenced by safety concerns: “NZ is a safe country, not like America. It made me feel relaxed...When I was in America I had to worry about my bag all the time and hide it between my legs, but I don’t have to do that in NZ”. She had chosen to travel on a group tour also for security reasons and for enjoyment: “I cannot travel by myself, especially because I cannot speak English...I like travelling with a group”.

The same themes of nature, relaxation, escape from daily life and security characterised this interview.

<b>Case Twelve</b>	
<b>Destination</b>	<b>Activity</b>
<p>Compared to Las Vegas and America, NZ is calm, not dangerous, it is relaxing</p> <p style="text-align: center;">▼</p> <p>When I was in Las Vegas I had to worry about my bag all the time and hide it between my legs... But I do not have to worry about that in NZ</p> <p style="text-align: center;">▼</p> <p style="text-align: center;"><i>Chian ga ii (security)</i></p>	<p style="text-align: center;">Sightseeing</p> <p style="text-align: center;">▼</p> <p style="text-align: center;">Beautiful scenery</p> <p style="text-align: center;">▼</p> <p>I was moved by the scenery. We don't have such huge mountains in Japan, and such big scenery</p> <p style="text-align: center;">▼</p> <p style="text-align: center;">It made my heart feel beautiful/clean</p> <p style="text-align: center;">▼</p> <p style="text-align: center;"><i>Kokoro ga arawareru</i></p>
<b>Travel Style</b>	
<p style="text-align: center;">Package tour</p> <p style="text-align: center;">▼</p> <p>I can not travel freely by myself. Firstly I can only speak Japanese. I feel relieved/comfortable if I can buy things from a Japanese person... (travelling in) a group is best</p> <p style="text-align: center;">▼</p> <p style="text-align: center;"><i>Anshin (security)</i></p>	



***Case Thirteen***

Case Thirteen was a seventy year old housewife who was travelling on a sightseeing tour with a large group. She had come to NZ to attend the 45th anniversary promoting international friendship between NZ and Japan. While in NZ she had done the Milford Sound cruise and said the scenery was the most important thing about her trip to NZ because “there is beautiful scenery that we can only see in NZ”. She said it made her feel refreshed and allowed her to rid herself of stress from daily life. “It helps me to feel refreshed. Especially people who have a busy life-style I suppose are impressed by seeing beautiful scenery”. Having contact with New Zealanders and warm relationships were also important to her. The choice to come on a package tour was governed by the nature of the trip.

Nature, escape from stress and refreshing oneself again arose in this interview. This respondent was also seeking contact with New Zealanders.

<b>Case Thirteen</b>	
<b>Destination</b>	<b>Activities</b>
<p>For the 45<sup>th</sup> Anniversary of the NZ-Japan Friendship Association</p> <p style="text-align: center;">▼</p> <p>To enjoy contact with New Zealanders</p> <p style="text-align: center;">▼</p> <p><i>Fureai (human relations)</i></p>	<p>Cruise on Milford Sound</p> <p style="text-align: center;">▼</p> <p>Scenery</p> <p style="text-align: center;">▼</p> <p>Because it is amazing nature you can only see here...it makes me feel refreshed</p> <p style="text-align: center;">▼</p> <p><i>Refureshu (refresh)</i></p>
<b>Travel Style</b>	
<p>Package tour</p> <p style="text-align: center;">▼</p> <p>Travelling with association group</p>	

***Case Fourteen***

Respondent Fourteen was a fifty-five year old office worker on a sightseeing trip with her friend. She had chosen to come to NZ as she had heard about Milford Sound and wanted to compare it to the fiords she had seen in Canada. She thought it was beautiful and it moved her, the scale and scenery were so different to Japan: “I felt like I achieved something”. She had chosen a package tour that allowed her some free days to do what she liked, for the convenience of having the basics organised. “This was my first time to NZ so I didn’t know what to do...I did not know anything at all...but I think I can come to NZ by myself for the second visit”. She had been hiking at Mount Cook to relax and refresh herself (*kimochi ga arawareru*).

This respondent was also motivated by a desire to be in nature and related it to relaxation and inner harmony, but also to achievement.

<b>Case Fourteen</b>	
<b>Destination</b>	<b>Activity</b>
<p>The scenery is so different to Japan</p> <p style="text-align: center;">▼</p> <p>The scale its dynamic</p> <p style="text-align: center;">▼</p> <p>I felt like I achieved my goal</p> <p style="text-align: center;">▼</p> <p><i>Mokuteki Tassei (achievement)</i></p>	<p>Walking at Mount Cook</p> <p style="text-align: center;">▼</p> <p>To refresh</p> <p style="text-align: center;">▼</p> <p><i>Kimochi ga arawareru</i></p>
<b>Travel Style</b>	
<p>Package tour</p> <p style="text-align: center;">▼</p> <p>This was my first time to NZ so I didn't know what to do</p> <p style="text-align: center;">▼</p> <p>Convenience of having someone knowledgeable look after you</p> <p style="text-align: center;">▼</p> <p><i>Raku (ease/convenience)</i></p>	

### **Summary of Airport Tourist Interviews**

The key themes for package tourists were very clear. Firstly, nature was a key theme and was related to an escape from daily life, a desire for relaxation, refreshing oneself and inner harmony. Six of the seven respondents identified this theme in their interviews. The other key theme was the idea of group security and a desire for ease (*raku*), i.e., to be looked after and provided for. Two respondents mentioned knowledge and new experiences; fulfilment and excitement were also mentioned on one occasion each, but the two key themes were clear and consistent throughout the interviews with respondents at the airport location.

### **7.4 Values**

The key values identified after analysing the ladders are presented below in decreasing order of the frequency they were mentioned. Because of the clear differences between tourists interviewed at the airport and backpackers, results are presented for each group separately. Ten key values were identified from the interviews with package tourists and thirteen from the backpacker interviews. Five of these values were common to both groups meaning a total of eighteen values were identified in the research. For package tourists, inner harmony, security, and ease were the most frequently mentioned values motivating tourism choices. For backpackers, human contact, freedom, personal satisfaction, and safety were the key values.

**Table 8**

## Key Values

**PACKAGE TOURIST**

Value	Total
<i>Kokoro ga yasuragu</i> 2 <i>Kokoro ga arawareru</i> 3	5
<i>Anzen</i> (security) 2 <i>Chian ga ii</i> 1 <i>Anshin</i> 2	5
<i>Raku</i> (ease)	3
<i>Kōfun, wakuwaku</i> (excitement)	2
<i>Jyūjitsukan</i> (fulfilment)	2
<i>Refureshu</i> (refresh/relax)	2
<i>Jiyū</i> (freedom)	1
<i>Mokuteki Tassei</i> (achievement)	1
<i>Keiken</i> (new experiences)	1
<i>Fureai</i> (human relations)	1

**BACKPACKER**

Value	Total
<i>Fureai</i> (human contact)	5
<i>Jiyū</i> (freedom)	4
<i>Jibun no manzoku</i> (personal satisfaction)	4
<i>Anzen</i> (security) 3 <i>Anshin</i> 1	4
<i>Chishiki</i> (knowledge)	2
<i>Atarashii taiken</i> (new experience)	2
<i>Benri</i> (convenience)	2
<i>Fulfillment</i> (inference)	1
<i>Refureshu</i> (refresh)	1
<i>Puraibashii</i> (privacy)	1
<i>Sekai ga hirogaru</i> (expand horizons)	1
<i>Jisonshin</i> (self respect)	1
<i>Shiawase ni naru</i> (happiness)	1

**7.4.1 Values for Package Tourists**

- The value *kokoro ga yasuragu* means to relax ones heart/to be peaceful and *kokoro ga arawareru* means to clean/clear ones heart (see Table Eleven p162 for further analysis of meaning), these values were often related to nature, scenery and mountains.
- *Anzen*, *anshin* and *chian ga ii* can all be translated as security, though their meaning differs slightly (see Table Eleven). *Anzen* was related to safety from war, conflict or terrorism and was a motivation for choosing NZ as a destination. *Chian ga ii* was mentioned in reference to safe accommodation, food, etc., and was related to the decision to travel in a group tour. *Anshin* was related to relaxation,

an absence of danger, familiarity and language ability and these things were identified in response to destination and travel style choices.

- *Raku* can best be translated as ‘ease’ and always arose in relation to the decision to travel on a package tour. It was related to a desire to ‘do nothing’; the avoidance of problems; and to travellers’ lack of confidence, either because it was their first trip to NZ or because of language ability.
- *Kōfun* and *wakuwaku* mean excitement and were related to the choice to come to NZ for new experiences.
- *Jyūjitsukan*, fulfilment, was mentioned by two respondents both in reference to their decision to come to NZ. For one person it was related to the fulfilment of a fantasy through visiting the Lord of the Rings locations, and the other through the fulfilment of a desire to see world heritage sites.
- *Refureshu*, the English loan word for ‘refresh’, was always used as a motivation for activity choice, being related to water and an escape from a busy life into nature.
- *Jiyū*, freedom, was mentioned in relation to NZ as a choice of destination and the escape from stress of everyday life in Japan.
- *Mokuteki tassei*, achievement, was also related to the choice to come to NZ and experience nature.
- *Keiken*, experience, was related to activity choice.
- Finally *fureai*, human relations, was related to the choice to come to NZ to have contact with NZ people.

**Table 9****Summary of Key Values for Package Tourists**

Value	Related to (Interview Number)	Travel Behaviour
<i>Kokoro ga yasuragu</i>	Nature (1)	Activity
<i>Kokoro ga arawareru</i> - inner harmony	Nature (2) Nature scenery, mountains, refresh (3,5,7)	Destination Activity
<i>Anzen</i> - security	Safe from war/conflict (3) Protect wife (safe accommodation/food choices) (4)	Destination Travel style
<i>Chian ga ii</i> <i>Anshin</i>	Not dangerous (5) Language ability/familiarity (5) Package tour (3)	Destination Travel style Travel style
<i>Raku</i> - easy	Desire to do nothing, speaking ability (1) Avoidance of problems/ security (2) First time to NZ (7)	Travel style Travel style Travel style
<i>Kōfun, wakuwaku</i> - excitement	New Experience (2) Nature (2)	Destination Activity
<i>Jyujitsukan</i> - fulfilment	Enjoyment, happiness, fulfilment of fantasy (1) Nature/World heritage (4)	Destination Destination
<i>Refureshu</i> - refresh	Water, different to Japan (6)	Activity
<i>Jiyū</i> - freedom	Stress, escape from daily life (1)	Destination
<i>Mokuteki tassei</i> - accomplishment	Nature (7)	Destination
<i>Keiken</i> -new experiences	Jet boat (4)	Activity
<i>Fureai</i> – human relations	Contact with New Zealanders (6)	Destination

In summary, nature-based activities (which in some cases determined destination choice) were motivated by the values *kokoro ga yasuragu* and *kokoro ga arawareru*. Other activity choices were related to the values of excitement, being refreshed and experience. The choice to come to NZ was motivated by security, fulfilment, freedom, accomplishment and contact with New Zealanders. Finally, travel style choice (i.e., to travel in a tour group) was related to security and ease.

**7.4.2 Values for Backpackers**

- For the backpackers the most frequently mentioned value was *fureai* or human contact/relationships. This was often mentioned in reference to the choice to stay at backpacker style accommodation. It was also related to the decision to come to NZ and the perception of NZ as a friendly destination, offering the opportunity to talk and interact with people.
- *Jiyū*, freedom, was mentioned in relation to accommodation and transport choices in the context of freedom to act and not be restricted; this was often contrasted to perceived restrictions in Japan.
- *Jibun no manzoku*, personal satisfaction, was in most cases elicited in response to activity choice decisions and reflected a satisfaction in new experiences, physical



achievements and being different or standing out. It was once used in reference to coming to NZ and the satisfaction of learning about both language and culture.

- The value *anzen*, security, was elicited from one respondent in reference to their decision to stay in a homestay, and by two people in reference to using public transportation. For one person *anshin* was related to the choice to go trekking in the mountains.
- *Chishiki*, knowledge, was the motivating value for the choice to come to NZ to gain knowledge about the people and the culture. For one person it was the reason they chose to stay in backpacker accommodation, to increase their knowledge of the language and to share other's knowledge.
- *Benri*, convenience, was often the value linked to the decision to use bus transportation because it was cheap, easy and practical. It was also mentioned once in the decision to stay at backpackers for similar reasons.
- *Jyūjitsukan*, fulfilment, for one respondent this was linked to the choice to come to NZ in the context of a change in pace of life and an opportunity to gain experience and knowledge.
- *Refureshu*, to refresh oneself, was related to the choice to come to NZ for a change of pace and to get rid of stress.
- *Puraibashii*, privacy, was mentioned by one respondent as the value that motivated his choice to stay in motel accommodation as it allowed him to keep himself private from others.
- *Sekai ga hirogaru*, to expand horizons, was related to the decision to come to NZ and a desire to travel, make friends, talk to people and find a job.
- *Jisonshin*, self respect, was related to the activity choice to engage in short skiing rather than snowboarding in order to be different to others.
- *Atarashii taiken*, new experiences, were related to the choice to try new activities.
- The value *shiawase ni naru*, happiness, was related to activities involving nature.

**Table 10****Summary of Key Values for Backpackers**

<b>Value</b>	<b>Related to</b>	<b>Travel Behaviour</b>
<i>Fureai</i> – human contact	People, relaxation (1) Communicate with people (5) People – exchanging information People (1) People – New Zealanders friendly (7)	Accommodation (Backpackers - BP) Accommodation (BP) Accommodation (BP) Destination Destination
<i>Jiyū</i> - freedom	Do what you want (restrictions in Japan) (3) Feels good, different to everyday life, snowboarding (4) Freedom to go places (freedom from restrictions in Japan) (2) Do whatever, stop whenever (4)	Accommodation Destination/Activity  Transport (rental car)  Transport (rental car)
<i>Jibun no manzoku</i> – personal satisfaction	Various experiences (4) <i>Medachitai</i> (5) Hiking, reaching the top, non competitive (7) Learn English, future job, new language and culture (6)	Activity/Destination Activity Destination/Activity Destination
<i>Anzen</i> - security  <i>Anshin</i>	Driving in an unfamiliar country dangerous (5) Safe and fast (7) Not worry (5) Mountains (1)	Transport (bus) Transport (plane) Accommodation (Homestay) Activity
<i>Chishiki</i> - knowledge	People (1) English ability, human relationships/ people (7)	Destination Accommodation (BP)
<i>Benri</i> - convenience	Cheap and easy, don't have to worry (3) Cheap and practical	Transport (bus) Accommodation (BP)
Fulfillment (inference)	Change, no regrets, experience, knowledge, pace of life (3)	Destination
<i>Refureshu</i> - refresh	Change pace of life, do something different, get rid of stress (2)	Destination
<i>Puraibashii</i> - privacy	Not showing belongings/self to others (2)	Accommodation (motel)
<i>Sekai ga hirogaru</i> -expand horizons	Learn English, travel, make friends, talk to people, find job (5)	Destination
<i>Jisonshin</i> – self respect	Unique person, different from others (6)	Activity
<i>Atarashii taiken</i> -new experience	Paragliding, flying, scenery (7) Different experiences to Japan (2)	Activity Activity
<i>Shiawase ni naru</i> - happiness	Being one with nature (3)	Activity

In summary, the choice to come to NZ elicited the values: human relations, freedom, satisfaction, knowledge, fulfilment, and expanding horizons. Accommodation and transportation choices were motivated by human relations, freedom, security, knowledge, and convenience. Finally, satisfaction, new experiences and happiness guided activity choices.

### 7.4.3 List of Values

Six of the nine items from the List of Values were elicited in the Means-End interviews. The item 'Fun and Enjoyment', which was described in the early focus groups as being the 'purpose of life', was not elicited, perhaps because it is considered such an all encompassing value. 'A Sense of Belonging' and 'Being Well Respected', assumed to be important values to Japanese people given their group orientation, were not elicited either. 'Self-fulfilment', 'Respect', 'Sense of Accomplishment' and 'Excitement' were each mentioned once. The

values ‘Security’ and ‘Warm Relationships with Others’ were the only values from the LOV that featured predominantly in the interviews.

Eleven additional items not captured in the LOV were elicited during the interviews;

- *Kokoro ga arawareru, Kokoro ga yasuragu*
- *Raku* (ease)
- *Refureshu* (to refresh oneself)
- Freedom
- New experiences
- Knowledge
- Expand horizons
- Convenience
- Privacy
- Happiness

Three of these values – *kokoro ga arawareru*, *kokoro ga yasuragu* and *raku* can be considered emic values. They are specific to Japanese cultural beliefs and social organisation and their meaning is discussed in depth in section 7.5. The remaining values may be considered more ‘universal’ in nature and some are included in Schwartz’s Value Survey and/or Rokeach’s Value Survey. However, their meaning must be interpreted within the Japanese cultural context. The table below provides definitions of the Japanese value terms revealed in the Means-End interviews according to the Japan National Language Dictionary.

#### 7.4.4 Meaning of Value Items

**Table 11**

Translation of Japanese Value Items

Value	Meaning (Nihon Kokugo Daijiten 2000)
<i>Kokoro ga yasuragu</i>	No tension, emotionally stable, relaxed, mental relaxation <i>Yasuraka</i> – 1) purity, peaceful, quiet, nothing to worry about 2) relaxed, not pressed 3) not rushing, taking time 4) no difficulties, can do what you want Buddha's face is <i>yasuraka</i> Often related to water
<i>Kokoro ga arawareru</i>	To clear away dirt from the heart, to refresh oneself Related to nature (especially water and mountains) in history and poetry from the Heian Period (12-13 Century)
<i>Kokoro</i>	Human spirit, mind, heart. Organ which controls intellectual, emotional and spiritual functions of human beings. Opposite to physical and material things. Spirit, soul. Subtle psychological feeling which reacts to external conditions (people or nature). Ability to understand poetry, literature, art and beauty. The Japanese self (Sugiyama Lebra 1992)
<i>Anzen</i>	Physical safety, security
<i>Chian ga ii</i>	Physical safety
<i>Anshin</i>	Not worried, relieved, psychological safety/security Dates from 1500's, similar meaning to <i>kokoro ga yasuragu</i>
<i>Raku</i>	Easy. To mentally and physically relax and enjoy <i>Shinshin ga yasuraka de tanosii koto. Yasashii koto</i>
<i>Kōfun, (wakuwaku)</i>	Excitement, ( <i>wakuwaku</i> , onomatopoeia - heart beating in anticipation)
<i>Jyujitsukan</i>	Fulfillment, sense of fullness, full of content, rich
<i>Refureshu</i>	English loan word 'refresh'. To clear/clean one's heart/self. Refresh one's feeling/mood. To give spirit, make one feel vitality, energy, spirit <i>Kokoro o arata ni suru. Kibun o sawayaka ni isho suru koto. Iki o atae, genki zukeru koto.</i>
<i>Jiyū</i>	Freedom. Not restricted. <i>Kokoro</i> <i>no mama de aru koto</i> – as my heart leads me; as I think
<i>Kaihōkan</i>	Free, not bound, not constrained, liberated,
<i>Mokuteki Tassei</i>	To reach, achieve a goal
<i>Keiken</i>	New experience
<i>Fureai</i>	Physical touch, intimate relationships, communication between hearts
<i>Jibun no manzoku</i>	Personal sense of completion, satisfied
<i>Chishiki</i>	Knowledge
<i>Benri</i>	Convenient, useful
<i>Puraibashii</i>	English loan word 'privacy'. Freedom in private life of individuals that doesn't allow interference by others
<i>Sekai ga hirogaru</i>	Expand horizons. Open up world (literally)
<i>Jisonshin</i>	Self respect, consciousness of self authority, doesn't allow others to interfere. Pride
<i>Shiawase ni naru</i>	To feel happy, fortunate

#### 7.4.5 Discussion of Results

What appears to differentiate the two major segments of Japanese tourists found in this study is indeed their values. Values rather than demographics appear to determine travel style, motivations for destination and activity choices. The honeymoon group highlight this finding: in their late twenties and early thirties they are of a similar demographic to many of the backpackers; however, their values and travel behaviour are clearly different. Package tourists and honeymooners are primarily motivated by the values of security, *raku* and *kokoro ga arawareru*. In contrast, the backpackers show an entirely different and much wider set of values.

##### Package tourists

The values motivating travel behaviour choices for tourists travelling on package tours were relatively few and consistently found. The desire to escape the stresses of daily life, to relax, refresh and re-connect to ‘something’ through nature and nature-based activities were the primary values motivating destination and activity choice. A desire for security and ‘ease’, physically and psychologically, is part of this relaxation and determines travel style. This group is not seeking challenges, ultimate fulfilment or a sense of achievement, nor real contact with the culture or the people. They are seeking mediated experiences and the comfort and security of familiar relationship structures, depending on a contextual ‘superior’ or guide to make their trip more relaxing.

In general the values identified for this group reflect the stereotypical image of the Japanese tourist and show little individualism. The predominant theme to emerge from interviews with package tourists is the importance of nature and the values *kokoro ga yasuragu* and *kokoro ga arawareru*. These sentiments were the defining feature of destination and activity choices for this group. The meaning and implications of these values are discussed in section 7.7.

Experiences and activities for this group were predominately passive and mediated, such as viewing Milford Sound on board a cruise, or visiting a specific scenic location. ‘Excitement’ too was in packaged forms such as jet boating. Some of the interviewees were guided by personal goals, one person pursuing an interest in the Lord of the Rings movie, and another, an involvement with the NZ-Japan Friendship Association. Fulfilment was mentioned by two respondents; however, they referred to the fulfilment of a very personal or specific goal: e.g.,

visiting *Lord of the Rings* locations, World Heritage sites, rather than more general ‘self-fulfilment’.

What the interviews with package tourists confirm is the inherently cultural nature of the key values motivating tourism choices for this group. The values ‘*raku*’ and ‘*kokoro ga yasuragu/arawareru*’ are particular in their expression and emphasis to Japan and can not be adequately understood except in wider reference to Japanese culture (see section 7.7).

### **Backpackers**

The values motivating travel behaviour choices for the Japanese backpacker do not reflect the stereotypical image of the Japanese traveller. The values and motives for travel are individual and differ widely; respondents were motivated by values that reflected a very personal search for meaning and fulfilment. Backpackers were not seeking relaxation but challenges. The respondents expressed a desire to escape from the stress and restrictions of daily life in Japan and a search for freedom; freedom to experience, to explore, to be free from restrictions. They were dissatisfied with elements of life in Japan and are open in their critique of Japanese society. Most of the backpackers were pursuing personal interests such as snowboarding, learning English, diving etc and had a genuine desire for knowledge and experience. They want to interact meaningfully with the people, the culture, and the lifestyle of New Zealand. They also want to learn, to expand their horizons, and perhaps ultimately to find personal fulfilment, though this was not directly stated. They are not afraid of being different, and in fact for two respondents this ‘desire to stand out’ (*medachitai*), was a key value.

There has been a stream of literature in Japan on *shinjinrui* - the ‘new human beings’ or ‘new breed’. The values and travel characteristics of many of the backpackers can best be understood and interpreted with reference to this literature. The *shinjinrui* have been characterised as being driven by personal ambition, an appreciation for the ‘good life’, and an emphasis on diversity, individuality and self-actualisation (Anderson and Wadkins 1991). They are much less constricted in their thoughts and feelings than earlier generations and reject the harsh and stern in favour of a relaxed, pleasurable way of life. They are also associated with a preoccupation with fashion, hobbies, the mass media and a need for instant gratification (Iwao 1988, Anderson and Wadkins 1991).

Herbig and Borstorff's (1995) study of *shinjinrui* found that they focus on having fun and enjoying life. *Shinjinrui* tend to be practical, easy-going and money-minded. They are inclined to work to live rather than live to work and are much less ready to submerge their personal ambitions and private lives to the success of the company or wider group than older Japanese people. They believe the main aim of life is personal pleasure. They are not content with the existing systems, are less committed to teamwork, more individualistic and have been criticised by the elder generation for their carelessness, wasteful spending, and lack of appreciation for traditional values.

Initially, *shinjinrui* were seen as a group of children/young adults "in a particular period of life when their behaviour patterns tend to be atypical and yet tolerated by mainstream Japanese society because they are not yet a *shakaijin*" (Herbig and Borstorff 1995:59). (The word *shakaijin* translates as social being or public person). However it is becoming apparent that a critical mass of the *shinjinrui* are resisting becoming *shakaijin* and remaining *shijinrui* (Herbig and Borstorff 1995). Leisure time is highly important for this group; they make a clear distinction between leisure and work time and are willing to spend a relatively large proportion of their income on leisure activities. It is predicted that as this group grows and takes more responsibility, the entire society will change the way it thinks of leisure.

According to Herbig and Borstorff (1995), a key aspect defining *shinjinrui* is a desire to be different. "The definition of a *shinjinrui* is to be different from everyone else, to do what you want" (1995:53). Sociological analysts maintain that what drives young, affluent Japanese is not the deprivation motive but the 'difference motive' which prompts them to purchase luxury goods and services that give them a sense of being different from other people (Sugimoto 1997). "For these youngsters, the dominant themes are playfulness, gaming, escape, tentativeness, anarchy, and schizophrenic differentiation, in contradistinction to the rigidity, calculation, loyalty, fixity, hierarchy, and paranoid integration of modern society" (Sugimoto 1997:69).

Another recognised group to emerge in Japanese society over the last two decades is the *freeta*. The term *freeta* (or *freeteer*) was coined in 1991 by Recruit, a publisher of job placement material, by combining the English word 'free' and the end of the German word *arbeiter* (labourer). According to the Ministry of Labor there were 1.5 million *freeta* in 1997 and this was estimated to have grown to two million in 2000. This figure constitutes 10% of

unmarried people between the ages of twenty and thirty four (Yamada 2001). *Freeta* are classified as being unmarried young people who reject conventional jobs for the freedom of part-time work (Sugimoto 1997). Interviews with *freeta* by Yamada (2001) revealed three types; those with clear goals; those who wanted an easy job and a high salary; and those who enjoyed travelling abroad and chose to be *freeta* in order to have the time to do so. According to Yamada (2001) what these *freeta* have in common is an idealised image of the future that seems to be almost within reach yet cannot be grasped. Their primary aim is to lead a playful life (travelling abroad, climbing mountains, enjoying marine sports and so forth) after saving a certain amount of money. A related term, often used to describe *freeta* who live at home, is Parasite Singles: these young people live at home, while their parents take care of their basic needs, and use almost all of their earnings from part-time work on shopping and travel.

Clearly many of the backpackers represent *shinjinrui* and/or *freeta* and this literature is helpful in interpreting their values within the wider context of Japanese society, though perhaps the literature focuses on the negative rather than the positive traits of this group. The values and behaviours identified in the interviews with backpackers do reveal a generation more individual, but also more confident, more focused on expanding their knowledge and horizons through genuine challenges, and in search of personal fulfilment. While their values are much the same as the values of youth everywhere, they are still grounded in a cultural background that is intimately Japanese and can not be adequately understood without reference to the fundamental cultural assumptions that shape them. These assumptions are discussed in the following section.

## 7.5 Research Themes

On analysis, the values identified clearly grouped into five key themes. The first was to do with 'inner harmony' (*kokoro ga yasuragu/arawareru*) and spirituality and linked to nature. The second was immediate concerns regarding physical security, convenience, privacy, and freedom and these values often determined travel style decisions. The third theme related to personal feelings such as fulfilment, satisfaction, self respect and freedom; these values related to the choice of NZ as a destination. The fourth theme to emerge was again personal but related to outer-directed values such as achievement, excitement, and new experiences. These were often the values that guided activity and destination choice (in many cases destination and activity choices were inseparable as activities were destination-specific, e.g., nature based activities, skiing, *Lord of the Rings* etc). The final group of values were those



related to people: human contact, psychological security (*anshin*), and being looked after/ease (*raku*). These values were tied to travel-style decisions. The table below summarises the five key value themes and the related travel behaviour.

**Table 12**

Values and Travel Behaviour

Values	Travel Behaviour
<i>Kokoro ga yasuragu</i> <i>Kokoro ga arawareru</i>	Nature
Security Convenience Privacy Freedom (from restrictions)	Travel Style
Warm relationships Fulfilment Freedom Satisfaction Self-respect Knowledge/expand horizons	Destination
Accomplishment Happiness Excitement Refresh New Experience/knowledge	Activity
Security Human relationships <i>Raku</i>	Travel Style

These groups of values are clearly linked to some important cultural beliefs. Theme One is linked to Japanese beliefs about nature, the spirit world, Shugendo, and Shinto and Buddhist beliefs in the oneness of man and nature. Theme Two is linked to the importance of immediate situation and context in Japanese culture. In interpreting the values falling under Theme Three, it is necessary to consider the concept of self and the nature of human beings in Japanese culture. Theme Four is related to distinctions between work and play in Japanese culture, and the nature of activity. Theme Five, human relations, is influenced by Japanese concepts such as *amae*, *giri/on*, ideas of collectivity vs. individualism, and the hierarchical, linear nature of Japanese society. In order to interpret and understand the values elicited in the interviews and their link to travel behaviour, it is first necessary to understand these deeper cultural beliefs that they are grounded in. Table Thirteen below summarises the links between important cultural beliefs, the value themes and travel behaviour. The cultural

beliefs summarised here are considered the most important beliefs to the discussion of value interpretation, and are discussed in-depth in Part Two of this chapter.

**Table 13**

Cultural Beliefs, Values and Travel Behaviour

Cultural Beliefs	Values	Travel Behaviour
Spirit world – Shinto/Shugendo Buddhism Harmony with Nature	<i>Kokoro ga yasuragu</i> <i>Kokoro ga arawareru</i>	Nature
Cyclical nature of time Situational Context	Security Convenience Privacy Freedom	Travel Style
Concept of man Concept of self – <i>jibun</i>	Warm relationships Fulfilment Freedom Satisfaction Self-respect Knowledge/expand horizons	Destination
Middle way Being in becoming Work/play distinctions	Accomplishment Happiness Excitement Refresh New Experience/knowledge	Activity
Human relationships - Interdependent/collective - Linear/hierarchical <i>Amae. Giri/On</i>	Security Human relationships <i>Raku</i>	Travel Style

The five themes emerging from the analysis of the Means-End interviews are very similar to the five value-orientations identified by Kluckhohn and Strodtbeck (1961) (Section 2.5).

Kluckhohn and Strodtbeck termed the five orientations:

- Man-Nature Orientation (What is the relationship between humanity and its natural environment?)
- Time Orientation (On what aspect of time should we primarily focus?)
- Human Nature Orientation (What is the nature of human nature?)
- Activity Orientation (What is the prime motivation for behaviour - to express one's self, to grow, or to achieve?)
- Relational Orientation (How should individuals relate with others - hierarchically, as equals, or according to their individual merit?)

Kluckhohn and Strodtbeck (1961) also suggested a sixth value dimension of Space (Here, There, or Far Away) but did not explore it further.

The five dimensions have been defined in more recent literature (Schein 1992) as;

**Nature of Truth and Reality (Man-Nature Orientation):** The shared assumptions that define what is real and what is not, what is a fact in the physical realm and the social realm, how truth is ultimately to be determined, and whether truth is revealed or discovered.

**The Nature of Time (Time Orientation):** The shared assumptions that define the basic concept of time in the group, how time is defined and measured, how many kinds of time there are, and the importance of time in the culture.

**The Nature of Space (Space Orientation):** The shared assumptions about space and its distribution, how space is allocated and owned, the symbolic meaning of space around the person, the role of space in defining aspects of relationships such as degree of intimacy or definitions of privacy.

**The Nature of Human Nature (Human Nature Orientation):** The shared assumptions that define what it means to be human and what human attributes are considered intrinsic or ultimate. Is human nature good, evil, or neutral? Are human beings perfectable or not?

**The Nature of Human Activity (Activity Orientation):** The shared assumptions that define what is the right thing for human beings to do in relating to their environment on the basis of the foregoing assumptions about reality and the nature of human nature. In one's basic orientation to life, what is the appropriate level of activity or passivity? What is work and what is play?

**The Nature of Human Relationships (Relational Orientation):** The shared assumptions that define what is the ultimate right way for people to relate to each other, to distribute power and love. Is life cooperative or competitive; individualistic, group collaborative, or communal? Is authority ultimately based on traditional lineal authority, moral consensus, law, or charisma? What are the basic assumptions about how conflict should be resolved and how decisions should be made?

In this thesis the space orientation, suggested but not elaborated on by Kluckhohn and Strodtbeck (1961) was combined with time, leading to the five key areas identified in the research;

The nature of reality and truth

The nature of time and space

The nature of human nature

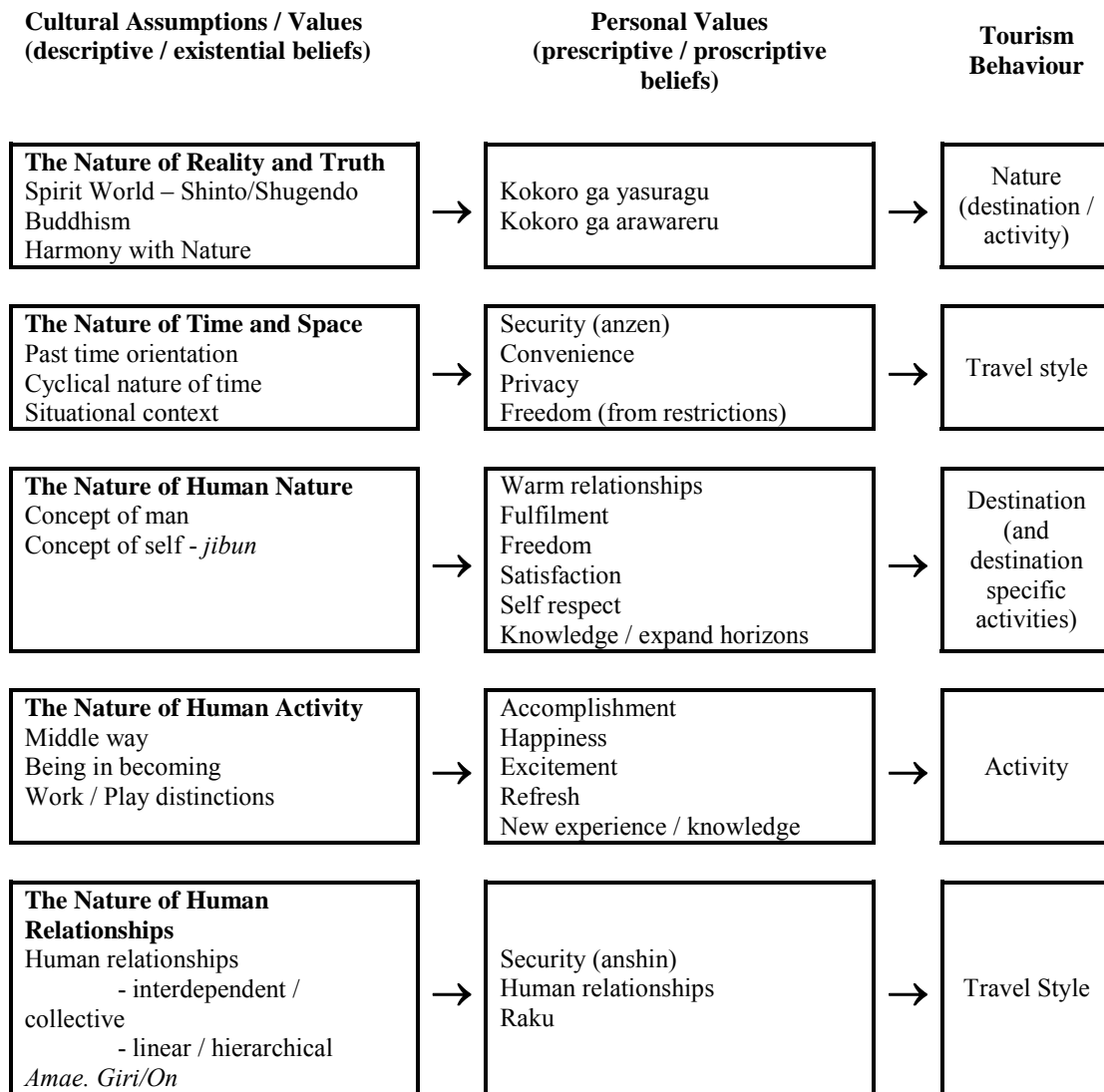
The nature of human activity

The nature of human relationships

These concepts and their links to travel behaviour and the values identified are shown in the theoretical model below.

**Figure 3**

Model of Linkages between Cultural Assumptions, Values and Tourism Behaviour



The following section discusses each of the dimensions and their relationship to the values and travel behaviour identified in the research

## **Part Two – Discussion of Results**

### **7.6 Introduction**

The model presented suggests that in order to interpret values and their impact on travel behaviour choices it is necessary to first understand the underlying cultural assumptions that shape and define the meaning of these values. This section discusses each of the five key cultural assumptions informing Japanese values.

### **7.7 Nature of Reality and Truth**

#### **7.7.1 Discussion**

Beliefs about the nature of reality and truth are grounded in metaphysical conceptions of the divine, nature and mankind. There are two basic conceptions of the divine: that of a superordinate entity who dispenses nurturance, care and love (the dualist, Western perspective); and the ground of being or the inner essence of reality (the monist, Eastern perspective) (Bellah 1957). In Western religions, God resides in the supernatural dimension while man and the rest of nature dwell in the natural dimension. The Western perspective, with Judeo-Christian and Greek foundations, is thus dualistic; man has characteristics which set him apart from nature and the spiritual, and he must control and manipulate nature to ensure his survival (Robinson, Shaver and Wrightsman 1991). In contrast, the Eastern perspective is based on harmony (yin and yang), as the origin of the world; thinking is monist, there is no good, no bad, no creator, no absolute, no immortal soul, and no external causes. There is a lack of distinction between the secular and the profane, and all of reality is interconnected and inseparable (Cauquelin, Lim and Mayer-Konig 1998). Non-dualistic beliefs emphasise wholeness; man should recognise his basic oneness with nature, the spiritual, and the mental (Robinson, Shaver and Wrightsman 1991). In Japan there is no ontological difference between men and gods; mankind shares his descent with the gods, and his spirit is one with all things of the world (Pelzel 1974). In contrast to the anthropomorphic omnipotent God of Western religion, the Japanese speak only of an impersonal spirit, or the laws of nature. To the Japanese “Nature is both a benevolent and nurturing force toward whom man should express gratitude, and a manifestation of the ground of being” (Bellah 1957:62).

The key religions underpinning these beliefs in Japan are Shintoism, Shugendo, Taoism and Buddhism. The term Shinto was coined in the 6th century using the Chinese characters *shen* (divine being) and *tao* (way), thus meaning, ‘the way of the *kami* (gods)’ (Campbell and Noble 1993). Shinto has the characteristics of a primitive religion, including nature worship and taboos against *kegare* (impurities), but has no system of doctrine. It is an animistic religion, mainly concerned with traditional rites and festivals. Historically it was not viewed as an independent religion and was actually a generic term for popular beliefs, customs, rituals and beliefs (Kuroda 1993). Shinto legend holds that the first emperor of Japan is a direct descendent of Shinto gods (*kami*). Thus Shinto is very closely tied to the national culture (Sood and Nasu 1995). Commonly, Shinto is regarded as the indigenous Japanese religion and the foundation of Japan’s identity as a nation. *Kami* is usually translated as ‘gods’, but it is also applied to natural objects which are regarded as sacred, such as trees, mountains, rivers and animals. Sensitivity to the aesthetic and the environmental value of mountains and forests is also a defining feature of Shintoism.

Shugendo is a religion based on mountain asceticism that developed a specific religious structure when the beliefs and faith with regard to mountains in ancient Japan were influenced by foreign religious traditions such as Buddhism, Taoism and shamanism (Miyake 1993). Spiritual powers attained through the cultivation of ascetic practices in the mountains are perhaps the best-known aspect of Shugendo in present-day Japan. Practices centre on entering the mountains to make offerings of flowers, or to read or bury sutras in honour of various deities; and difficult ascetic retreats in the mountains in winter. The explicit function of the religious rituals of Shugendo is to remove evil influences and misfortunes from people’s daily lives. Mountains are seen as a sacred space, or as an actual part of the spiritual world, and are symbolic of the universe (Miyake 1993).

Taoism is a Chinese religious and philosophical system. *Tao* is the “unproduced producer of all that is” (Campbell and Noble 1993:951), and one can only know *Tao* by yielding to and following nature. Taoism emphasises harmony and equality of opposites – the theory of yin and yang. It focuses on nature, divination, healing and shamanism, seeking explanations for misfortune or illness and advice about auspicious times for important events in life (Hendry 1987). In Taoist philosophy, human beings are a small part of a single, vast and dimly comprehended natural unity (Morris Suzuki 1998). The heart of Taoist doctrines was the *tao*,

the immutable order of harmony, tranquillity, and equilibrium underlying nature, the universe and human society.

Buddhism was introduced to Japan around the 6th century and the idea was encouraged that *kami* were in fact Buddhist guardian deities, thus allowing for the amalgamation of traditional Shinto beliefs and Buddhism. According to the Buddha's view, suffering is experienced in life because everything is ever-changing and transient. Therefore it is impossible to claim anything as belonging to oneself or indeed to assert there is a self. Those who wish to be free from suffering must come to a clear understanding (enlightenment) concerning suffering, impermanence, nonself and reality (Campbell and Noble 1993). Buddhism makes no distinction between man and god: man's original state is that of union with the universe and the aim of spiritual cultivation is to return to this state of universal oneness (Bellah 1957). During the Tokugawa period (1600 to 1867) it was compulsory for everyone to be registered at a Buddhist temple. Nowadays, Buddhism guides funeral and memorial rites in Japan, and is also associated with aesthetic ideas and the arts.

In Japan religion pervades many spheres which we might call secular (Kurita 1987), and there has been a tendency to fuse religious values and secular goal-attainment values (Bellah 1957). Many Japanese have no strict allegiance to a particular religious organisation; however, they practise a variety of religious activities in the course of their lives (Kurita 1987). Japanese have leaned toward what we might call a 'secular religious life' or 'religious secular life' (Kaji 1995). This is reflected in studies of Japanese religiosity; only slightly more than 10% of Japanese respondents said they held a religious faith, but 93% took part in religious customs (Hendry 1987). "We may conclude that the Japanese in general are highly sensitive to a religious atmosphere regardless of whether they follow a particular creed" (Hayashi 1988:9).

Within the Japanese religious context, then, nature possesses a precious 'something' that is both at one with, and transcends, humanity. In every natural landscape, in mountains, rivers, and trees, there is a living god. All objects of nature, animate and inanimate, are manifestations of a great universal truth. The Japanese do not view nature in opposition to mankind or as an object which man must conquer. Instead they believe that man must live harmoniously within nature and strive for natural order and harmony (Kurita 1987). The etymological meaning of the Japanese word *shizen*, used to translate the English word



‘nature’, is the power of spontaneous self-development and what results from that power. The Chinese characters for *shizen* literally mean ‘from itself thus it is’, expressing a mode of being rather than the existence of a natural order (Campbell and Noble 1993:1069). God as a creator is absent in Japanese culture and it has been suggested that human beings therefore seek comfort by attempting to immerse themselves completely in nature. Nature can be trusted completely and thus has a relaxing, healing function (De Mooij 1998). It has also been postulated that nature offers many Japanese a sort of refuge from a restrictive society and a sense of personal fulfilment through identification with its beauties and processes (Reischauer 1977). However, while nature, particularly mountains, are to be appreciated, they are also deeply respected, and it could well be these underlying religious and folk beliefs in the supernatural power of nature that explain why Japanese people fear raw nature not tamed by human hand (Henshall 1999, Kalland 1995).

In earlier ages mountains were seen as remote, inaccessible and dangerous, the abode of various spiritual entities including, it was widely believed, the souls of the dead: they thus formed the antithesis, the wild outside that contrasted with the safety and comforts of the towns, villages and valleys. Their very danger as symbols of the outside and abodes of the spiritual, however, made them powerful, fitting places for ascetic practice and for those who dared to step outside the normal confines of society to encounter and acquire the powers of the spiritual world (Reader 1991:117).

Water is also a highly symbolic element of nature’s spirituality in Japan. Water austerities (*suigyō*) of various forms are used throughout the Japanese religious world. One core reason for this emphasis on water is its purificatory symbolism and the importance this has as a means of regeneration. Water austerities are seen as exorcising spiritual obstructions and giving birth to new awakenings (Reader 1991).

### **7.7.2 Implications**

Essentially, the spiritual world is a reality in Japanese culture and these spirits reside primarily in nature. Man’s oneness with nature is a deeply held cultural assumption and nature is highly valued in and of itself. The relevance and importance of nature in determining destination and activity choice can only be understood in reference to these beliefs about nature, spirit and body. Nature tourism must consequently be linked to the deeper structures of Japanese beliefs about nature and reality.

*Kokoro ga yasuragu* and *kokoro ga arawareru* were the most frequently mentioned values for package tourists. They were elicited in direct response to nature-based activities, particularly

sightseeing, but also have implications for destination choice (nature being New Zealand's primary attraction). In order to interpret the values of *kokoro ga yasuragularawareru*, it is necessary to explicitly understand their meaning in the wider spiritual and religious context of Japanese culture. *Kokoro* means the heart, sentiment, spirit, will, or mind; according to Sugiyama Lebra (1992) *kokoro* is the center of the inner self. Japanese warn themselves against losing *kokoro* in the midst of material abundance (Sugiyama Lebra 1992), and nature offers an environment in which to reconnect this inner self with nature/God/spirit. Natural scenery, particularly mountains, are appreciated as a means of reconnecting to something greater, a way to refresh and relax one's body and mind. For package tourists the short-term respite and opportunity to reconnect mind, body and soul were obviously highly important motivations for travel to New Zealand, before a return to the reality of everyday life in Japan. New Zealand's natural scenery offers the opportunity to temporarily escape, refresh and rid oneself of daily life stresses by reconnecting to a more spiritual wholeness. This is not to suggest that viewing nature is a spiritual or religious activity for the modern Japanese tourist. However, its enjoyment and significance is firmly grounded in deeply held cultural beliefs regarding nature's spirituality.

## **7.8 The Nature of Time and Space**

### **7.8.1 Discussion**

The major religious traditions of Japan, and the Confucian cultural sphere, are oriented towards the past (Bellah 1957). Buddhist and Confucian theories of historical change are also cyclical. Buddhists perceive time as limitless: everybody lives, dies and is born again in a repeating cycle that ends only with delivery from worldly existence (Nobuyuki 1996).

Kluckhohn and Strodtbeck (1961), in their original conceptualisation of this dimension, relate attitudes towards time to issues of destiny, conformity and change. Japanese beliefs regarding the nature of truth and reality (as discussed in section 7.7), and their orientation towards a cyclical past, mean a relatively external locus of control. Internal or external locus of control refers to the degree to which persons expect that an outcome of their behaviour depends on their own behaviour or personal characteristics, versus the degree to which they expect that the outcome is a function of chance, luck, fate, under the control of powerful others, or simply unpredictable (de Mooij 2004, Rotter 1966). At the social level these differences mean that in cultures with an internal locus of control people are more inclined to take action to better their

situation/conditions, whereas in cultures with an external locus of control people are more dependent on institutions and authorities (de Mooij 2004).

Another important aspect of the Japanese concept of time and space is the importance of the immediate situation or context. Nakane (1970) characterised Japan as a society which stresses situational position in a particular frame, rather than universal attribute. While this may be overly simplistic and reflective of *nihonjron* writing (Henshall 1999), it remains true that in Japan how people act toward each other is a function of their relative status and the emphasis is on adherence to a code of behaviour that depends on the context one is in. Japan's concrete, situation-bound modes of perception mean that Japanese are less concerned with asserting themselves as autonomous agents whose actions and feelings exist apart from everyday social settings and engagement with others (Cousins 1989).

### **7.8.2 Implications**

Given this external locus of control and the high dependence on external institutions and authorities, security is particularly important to Japanese people, especially when travelling overseas. New Zealand is seen as a safe destination in comparison to the United States and Europe (with regards to threats of terrorism, theft, etc). However, security was also sought in the form of predictable and reliable services, particularly public/tourist transport services, which assure the traveller of not getting lost and being taken to the right 'tourist spots'. Pre-booked accommodation such as homestays also offered relative security for semi-independent travellers.

The importance of situational context, along with a fear of the unpredictable, is useful in interpreting the values of *raku* (ease/convenience) and security, as mentioned frequently by package tourists as the values motivating the decision to travel in this way. The acceptance of a passive role in the travel context, and the absence of a strong desire for autonomy, mean package tours offer a sense of ease and safety while not being perceived as restrictive. A planned itinerary and the guidance of an experienced tour guide mean little risk of unforeseen problems; the dangers associated with independently chosen accommodation and food is removed, and nuisances can be dealt with by the guide. There is no desire to be individual/unique, and the Japanese tourist is happy for the relative security and convenience of packaged and managed experiences.

For the backpacker and semi-independent travellers *raku* was not elicited as a value. However, lesser degrees of security and convenience were sought through accommodation and transportation choices, for example pre-booked home stay accommodation and public/tourist transport services. In contrast to the desire for security and ease, characteristic of package tourists, many backpacker's accommodation and transportation choices were motivated by the value 'freedom'. This freedom was not freedom in a wider existential sense, but simply freedom from restrictions. Commonly the choices of backpacker accommodation and private car as transportation were made because they allowed the respondent to 'do what they liked, when they liked'. This value can be seen as a rejection, typical of the *shinjinrui*, of the traditional dependence on external institutions and authorities (see section 7.4.5).

## 7.9 The Nature of Human Nature

### 7.9.1 Discussion

In the predominant religions of Japan man is thought of as both natural and divine; human nature is clearly good; there is an absence of the burden of original sin; and radical evil tends to be denied (Bellah 1957). The 'evil' person in early Japanese mythology is evil because he acts impulsively; he cannot empathise with the pain his actions bring to others and shows no capacity to give or receive consideration (Pelzel 1974). Myths suggest that the main sanctions, whether positive or negative, are those imposed by other people, and if man sins deeply or repeatedly he will be abandoned. In the mythic view it is the fate of mankind to succeed, with reasonable effort, in grappling with the material problems of daily life (Pelzel 1974). The fundamental Buddhist belief is also that man is essentially good, in need of only education to achieve a better state of mind (Reynolds 1980). Likewise, according to Confucian doctrine, the perfectibility of man and his social world is achievable by human effort (Weber 1964). The *Analects of Confucius and Mencius* state: "Man by nature is good: people's inborn characteristics are similar, but learning makes them different" (Scollon and Scollon 1995:125). The major problems of daily life are the achievement of inner tranquillity and the serene facing of the problems of life; according to Buddhism the lay follower must recognise the value of his human existence and pursue happiness in life (Gnanarama 1990).

In Western religion there is an individual soul, which is promised a direct personal relationship with the deity and is conceived of as externally separate from others. However, in Japanese religion there is no such individual self or soul. In Buddhism the self is an illusion;

in Shinto, *kami* is plural as well as singular; nor does Confucianism have a place for individualistic concepts of the person (Reynolds 1980). In Japanese religious belief, man's original state is that of union with the universe which, however, becomes lost through the assertion of the individual ego. Hence the aim of spiritual cultivation is to destroy the barriers created by the ego, and return to the state of universal oneness (Bellah 1957). In Buddhism, human suffering is thought to stem from the human tendency to cling to an unchanging notion of self and its craving (Cauquelin, Lim and Mayer-Konig 1998). Buddhism inspires man to become independent and self-guided while also warning man not to be self-centered only; self-realisation is the realisation of identity or unity of the self with the Universe (Gnanarama 1990).

The lack of belief in a metaphysical separation between the self and the universe is reflected in the Japanese word for self, *jibun*, which means 'one's share of the shared life space' (Hamaguchi 1985). The Japanese have a phrase to express the shallow and fragile concepts of themselves as individual entities: *jibun ga nai* means 'I have no self', and sociologists believe the concept is probably unique to the Japanese (Anderson and Wadkins 1991). The word *mu* also expresses this idea and means 'emptiness', 'selflessness' or 'the non-existence of self' (Suzuki 1974). In Japan, the individual will is considered part of selfish immaturity; the true individual finds his maturation in willing to be at one with the purposes of the social group (Reynolds 1980). Thus 'self' has a negative connotation in Japan, "doing something according to one's own style is called *jikoryū*, a term that carries negative connotations" (Ford and Honeycutt 1992:31). Likewise, the word individualism (*kojin-shugi*) has a negative connotation in Japan (Henshall 1999), suggesting to the Japanese selfishness rather than personal responsibility. Social conformity to the Japanese is not a sign of weakness but rather the proud, tempered product of inner strength (Reischauer 1977). The lack of a strong sense of self in separation from others is also reflected in the Japanese language, in which there are seven self-specifiers and numerous second person pronouns that vary according to the situation and relation of others (Suzuki 1974). The personal pronoun, 'I' is always relational and thus constantly shifting in Japanese. "We may even say that the Japanese self is in an undefined, open-ended state until the appearance and determination of a specific addressee" (Suzuki 1974:149).

This concept of self has been described by Markus and Kitayama (1991) as an interdependent self concept, as opposed to the independent self concept of Western cultures. Hamaguchi (1985) makes a similar distinction with the concepts of the contextual and the individual.

The independent self-concept common in Western cultures is characterised by an emphasis on personal goals, personal achievement, and appreciation of one's differences from others. People with an independent self-concept tend to be individualistic, egocentric, autonomous, self-reliant, and self-contained. They place considerable importance on asserting the self and are driven by self-serving motives. The individual is the primary unit of consciousness. One's personal attributes are primary and are seen as relatively stable from context to context. Emphasis is placed on displaying or showing one's attributes (e.g. pride, anger). The normative imperative is to become independent from others and discover one's uniqueness.

The interdependent self-concept found in Japan and common in many other non-Western cultures is characterised by stress on goals of a group to which one belongs, attention to fitting in with others, and appreciation of commonality with others. People with an interdependent self-concept tend to be obedient, sociocentric, holistic, connected, and relation oriented. They place much more importance on social harmony and are driven by other-serving motives. The relationships one has are the primary unit of consciousness. One's personal attributes are secondary and are allowed to change as needed in response to situational demands. Emphasis is placed on controlling one's attributes (e.g. avoiding the display of anger). The normative imperative is to maintain one's interdependence with others and contribute to the welfare of the group (Abe, Bagozzi and Sadarangani 1996: 99)

Sugiyama Lebra (1992) divides the Japanese self into three dimensions: the interactional self, the inner self, and the boundless self. The interactional self is socially, outwardly oriented, and subject to the demands of the social world and the group. This interactional self is compensated for by the inner self, and it is this inner self that provides a fixed core for self-identity and subjectivity. At the center of the inner self is the *kokoro*; while the interactional self is socially circumscribed, the *kokoro* can be free, spontaneous, and even asocial. The inner self, when dissociated from the interactional self, may be directed by self-expression or self-actualisation rather than social or group motivations. The boundless self is embedded in Buddhist transcendentalism; it entails disengagement from the world of dichotomies, and merging with the universe. Far from being assertive, the boundless self is supposed to be absolutely passive and receptive. The ultimate self then is equated, paradoxically, with the empty self or non-self (Sugiyama Lebra 1992).

The absence of a strong ego, or an interdependent self concept, has been considered in the West to imply a lack of individuality in Japanese society. This view, however, confuses individuality with individualism. Individualism represents one possible concept of personhood particular to certain Western societies; it is not a prerequisite of individuality, which is a human universal (Cousins 1989). The concept of individualism/collectivism, used so often in relation to Japan, is based on the assumption of a dichotomy between the individual and the group and ignores an equally valid definition of human nature and self concept which makes no such distinction. Yamazaki (1994) believes that in contrast to the rugged individualism of the West, Japan has a gentle individualism, established through self-expression within the context of shared principles. “While fully expressing oneself, one tries to avoid having one’s own self-expression intrude on other peoples’ egos and to establish one’s personal individuality within an aesthetic agreement with others” (1994:52). According to Lebra and Lebra (1974:158), in Japan

the autonomy of the individual is protected and assured not in society, but away from it, where one may legitimately indulge in self-reflection and introspection. It is the latter route that leads into one’s true heart (*kokoro*) and puts one again in contact with one’s true nature – one’s *hara* (belly) and self (*jibun*). It is in these inner realms that truth and integrity are thought to lie.

What the individualism/collectivist dichotomy causes us to miss is that the Japanese assign a high priority to the growth of human beings as individuals as well as social persons. Confucianism is distinctly concerned with the concept of self cultivation, advocating the search for understanding, satisfaction and development in discipline as a result of solitary practices of self-expression. However, in the long run self-development can only occur in a communal setting and there can be no fulfilment for the individual in isolation from his fellow man (Munro 1985). Individual values are prized as long as they do not lead to self-centeredness or selfishness, and do not contravene principles of harmony and effective group performance (Smith 1983). Self-reflection, development and cultivation are values highly emphasised in Japan, not just as a means of improving one’s own personality, but also as ways of making oneself a more valuable social being (Reader 1991). The Japanese person learns to cultivate his own individuality in ways that are socially acceptable. Historically Japan has had many displays of strong individuality (Henshall 1999), and today millions of Japanese find self-expression through their own personal literary, artistic or performing skill (Reischauer 1977). The ability to live in harmony with others without losing one’s own individuality is the most desirable quality of the individual in society (Hasegawa 1965).

### 7.9.2 Implications

What this discussion highlights is the inappropriateness of Western concepts of the self in understanding Japanese values, motives and behaviour. While values such as self-respect, self-fulfilment, and self-actualisation can be semantically translated into Japanese, their conceptual meaning can not. The LOV and other value scales that include these self-related values are potentially misleading if compared in importance rating scales with responses in other cultures. It is interesting that these ‘self’ prefaced values did not arise in the interviews. However, this is not to imply that each Japanese individual is not motivated by internally oriented, individualistic values, and these types of values did arise frequently in the interviews in relation to destination choice and destination specific activities. The values of freedom, happiness, satisfaction and fulfilment motivating these decisions are clearly individual values; however, their meaning must be understood with reference to the preceding discussion of the Japanese concepts of human nature and self.

For the Japanese, travel, and activities engaged in during travel, can be seen as one of the culturally acceptable ways of cultivating one’s individuality. Travel offers an escape from daily life and its roles and institutions and was described by many respondents in those terms. It offers an opportunity for self-expression through individual pursuits and is not burdened with restrictions on the self that exist in other contexts. For the young backpackers who openly expressed a dislike of a restrictive Japan, travel was not necessarily an act of rebellion, but a legitimate way of pursuing identity, fulfilment, satisfaction and freedom. The Western-style idea of freedom serves as a basis for asserting the precedence of the individual over the group, which is not seen as desirable in Japanese society; to the Japanese freedom is experienced as ‘having individual ideas’ (de Mooij 1998). We find the Japanese emphasis on achieving freedom through various pursuits, rather than the Western focus on the universal presence of freedom (Gould 1993) and this freedom was offered through travel. Travel, and particularly activities in nature, offer ‘this-worldly’ satisfaction, a temporarily different context and a legitimate space to pursue individual interests and values. In Japan the self is not something to be developed in its own right and thus respondents did not use values directly related to the self. However, it is clear that many respondents were motivated by individual/internally oriented values. Backpackers, especially, were strongly motivated by desires to enhance their personal boundaries and individuality.



## 7.10 The Nature of Human Activity:

### 7.10.1 Discussion

According to Kluckhohn and Strodtbeck's (1961) original model, there are three orientations toward human activity: the doing, being, and being-in-becoming orientations. The 'doing' orientation correlates closely with the assumption that nature can be controlled and manipulated, a pragmatic orientation toward the nature of reality, and a belief in human perfectibility. The 'being' orientation assumes that nature is powerful and humanity is subservient to it, implying a kind of fatalism; and an existential orientation that focuses more on the here and now, on individual enjoyment and acceptance of whatever comes. According to the 'being-in-becoming' orientation, the individual must achieve harmony with nature by fully developing his or her own capacities and thereby achieving a perfect union with the environment. Through detachment, meditation, and control of those things that can be controlled one achieves full self-development and self-actualisation (Kluckhohn and Strodtbeck 1961).

In light of the discussion on the nature of truth and reality (section 7.7) it is clear that Japan is best characterised by the 'being' and/or 'being-in-becoming' orientation. The Japanese are primarily interested in experiencing, in living, in doing, and in enjoying life (Moore 1967). "Harmony and happiness are seen as a 'natural' or original, states of affairs – the Japanese term for healthy, *genki*, literally means the original spirit – but this bliss can be easily destroyed if the balanced reciprocity between man and spirit is lost" (Kalland 1995: 249). They do not condemn self-gratification and consider physical pleasures good and worthy of cultivation. However, pleasure must be kept in its place and must not intrude upon the 'serious affairs' of life (Benedict 1946). While in accordance with Confucian philosophy, man's duty lies in conformity to the requirements of cosmic and social harmony, the pursuit of happiness is a relaxation in which one indulges when one can (Weber 1964). Thus, the Japanese work hard and take their familial roles seriously, but outside these contexts the Japanese person is free to 'play' and engage in activities purely for pleasure or happiness.

In Japanese society it has been regarded as a high virtue to be able to keep the mind tranquil and calm (Moore 1967). Confucianism advocates the cultivation of a 'harmoniously balanced personality'; likewise Buddhism has always chosen the middle path or avoidance of extremes; and Taoists are encouraged to model their behaviour on the *Tao*, a way of non-striving, non-

intrusive behaviour. Japanese people regard feelings as highly idiosyncratic and hard to control, and have a strong aversion to most open displays of feelings (Moore 1967, Reischauer 1977). Henshall (1999) discusses the Japanese concept of *kata*, the idea that everything has a proper form; *kata* is a 'functional ideal' that is very much normative and guides behaviour both for activities (Japanese martial arts and flower arranging are well known examples) and in social situations. In Japan activities and interests are thus often highly stylised and controlled, and reckless or abandoned activity uncommon.

Japanese achievement motivation, a feature of the culture noted particularly in its education system, is based not on striving for independence and self-reliance as in the West, but rather on affiliative and dependency needs: i.e., achievement motivation has a collective social origin (Yang 1995). High achievement needs are related to the unrepayable debt one owes the parents for their suffering and sacrifice (Smith 1983). The pressing need for personal accomplishment, which by definition will never be great enough, causes the adult individual to invest a high degree of identification with, and involvement in, whatever role he or she is playing. For the Japanese the acquisition of a skill is viewed as the outcome of the development of the inner self. Thus the Japanese take seriously any 'hobby' they engage in (Smith 1983).

### **7.10.2 Implications**

The group of values related to activity choice were outer-directed personal values such as achievement, accomplishment, fun, excitement, and the gaining of knowledge and experience. For the backpackers, achievement values were clearly related to activity choices which were guided by a passion for their interest or hobby – be it snowboarding, diving, learning English, or *Lord of the Rings*. For both groups tourism activities were seen as an escape from the 'serious affairs' of life and the English loan word *refureshu* was elicited as the motivating value for several people. Fun, excitement and new experiences were also key values appropriately pursued within the context of travel activities. A lack of strong emotion was evident in the interviews relating to activity choice; though excitement was mentioned as a value in a few interviews, it was not reflected in the respondent's manner. In general, the question of activity choice was responded to with hesitation, many respondents initially saying they had not done much/anything since arriving in New Zealand. Activity choices outside of those pursuing personal hobbies were generally passive in nature.

## 7.11 The Nature of Human Relationships

### 7.11.1 Discussion

The nature of human relationships in a culture define issues such as power, influence, hierarchy and individual or group orientation (Kluckhohn and Strodtbeck 1961). The nature of human relationships in Japan is influenced by the assumptions about human nature discussed earlier (section 5.7); however, it is Confucian beliefs regarding human relationships that have been particularly influential. According to Confucian thought, man exists through, and is defined by, his relationships to others; these relationships are structured hierarchically and social order and harmony are ensured through each party's honouring the requirements of the role relationship (Bond 1986).

The key elements of Japanese human relations are the hierarchy of relationships, and the importance of 'proper' conduct (Anderson and Wadkins 1991). How people act toward each other is a function of their relative status and the emphasis is on adherence to a code of behaviour that depends on the context one is in (Moore 1967). This is evidenced in the Japanese language and the use of *keigo* (honorific language): "*keigo* expresses status differences, respect, deference and intimacy. It is necessary to know another person's status relative to one's self before the correct language can be used" (Anderson and Wadkins 1991:132). Lebra and Lebra (1974) defined the ethos of Japanese culture as 'social relativism': an all-encompassing concern among the Japanese with human relationships and social interaction. Nakane (1970) also highlighted the importance of community in Japanese society, describing *wa* (harmony) as the key to Japanese culture. It has been suggested Japanese people prefer to act within the framework of a group and assume that such a group will be hierarchically organised and run by a paternalistic leader (Moeran 1986). A strict sense of hierarchy prevents individuals from asserting themselves and thereby unbalancing the harmony of the group. Relationships between superiors and inferiors are carefully cultivated and maintained and vertical loyalties are dominant (Sugimoto 1997).

The literature on socialisation in Japanese society reflects the importance placed on relationships with others, rather than self-autonomy, early in life (Reynolds 1980). Japanese mothers encourage indulgence and dependence in their children through co-sleeping; and isolation or separation from parents is a very powerful method of punishment. Japanese mothers are unlikely to say 'no', but will instead induce children to behave properly through

pleading, begging, bribery or appeals to shame. Japanese mothers also induce guilt in their children, i.e. shame, if they fail to fit in (Befu 1971). As a result of this early socialisation, throughout life the sense of being bestowed upon is deeply sought, as is the hope that someone will gratify one's deepest dependent needs (Befu 1971). The Japanese nightmare is exclusion, meaning that one is failing at the normative goal of connecting to others. This is in sharp contrast to the American nightmare which is to fail at separating from others. Japanese mothers teach their children to fear the pain of loneliness, whereas Westerners teach children how to be alone (Lebra and Lebra 1974).

*Amae* is the noun form of *amaeru*, a verb that means 'to depend and presume upon another's benevolence' (Doi 1974). *Amae* is translated as 'indulgent love', 'dependency needs', 'passive love' or 'primary love', and is best explained as the love a child feels for a kind and loving mother. Doi (1974), a Japanese psychologist, wrote extensively about *amae*, claiming it was the key to Japanese human relationships. While *amae* is not unique to Japan (De Mente 1995), and Doi's work has been criticised along with other *Nihonjinron* theories, *amae* remains a useful concept in considering human relationships in Japan. In Western societies, growing up and establishing one's independence and individualism is related to repressing the need for *amae*, but in Japan it is emphasised throughout life. Doi believes there is social sanction in Japanese society for expressing the wish to *amaeru*, dependency is fostered and the behaviour has been institutionalised into social structure. The cultivation of *amae* encourages feelings of complete trust and confidence. Japanese people assume not only that the other party will not take advantage of them, but also that they – in business or in private life – can presume upon the indulgence of others (De Mente 1995). An individual's behaviour is predicated on an expectation that others will act toward him with kindness and good will. The *amae* factor in Japanese psychology, according to Doi's line of reasoning, is what accounts for the 'childish' behaviour often ascribed to Japanese adults.

When this parent/child relationship of indulgence and dependence (*amae*) is introduced into other relationships it is known as *giri* or socially contracted dependence (Moeran 1986). *Giri* means social obligation and is the normative force which attempts to maintain social institutions running smoothly, irrespective of how an individual might feel about the social order or about other persons with whom they must interact (Befu 1971). The opposite of *giri* is *ninjō* - a person's 'natural' inclinations, feelings and desires. It is the combination of *giri* and *ninjō* which permeates all social relationships, in particular those between leader and

subordinate in a group (Moeran 1986). Within this concept there is an implicit acceptance or satisfaction with one's position in the social hierarchy. Inherent in *giri* is the properness of loyalty and dedicated service by the subordinates, and affection and paternalistic care on the part of superiors (Befu 1971).

Early socialisation, the importance placed on group relationships, and the expectation of leadership/subordinate role relations explain the preference for group travel amongst Japanese people. It has been suggested that most Japanese dislike travelling alone because it induces a feeling of loneliness and psychological insecurity (Nakane 1970). Traditionally, even on holiday trips, the Japanese surround themselves with friends or fellow workers, carrying with them their communal identity wherever they go. In the past Japanese travellers have rarely mixed with other travellers or local people in the countries they travel to (Nakane 1970). Another result of the emphasis on detailed codes of conduct and relationships is a tendency toward self-consciousness on the part of the Japanese – a worry that they may not be doing the right things and thus are opening themselves to criticism or ridicule by others. When confronted by the unfamiliar, a Japanese person is more likely to feel unsure of himself and this is particularly true in a travel context (Reischauer 1977).

### **7.11.2 Implications**

The values *raku* and *anshin* (psychological security) were elicited regularly as the values motivating the decision to travel in a tour group. *Raku* can best be translated as ease or comfort, and was linked to the desire to be 'looked after' and the avoidance of fear/insecurity arising from language problems and other unforeseen problems. It was clearly thought travel was more relaxing and psychologically 'easier' in a group situation with clearly defined roles. Dependency (*amae*) on the guide as the expert/superior extended to ordering of meals, and airport check-in's. Implicit in this relationship was the acceptance of decisions/rules made by the tour guide.

In contrast to the package tourists, the backpackers did not express the values security or *raku* and in fact decisions to stay at backpacker accommodation, while still related to human relationships, were made deliberately to enhance *fureai* (relationships) with other non-Japanese travellers. The backpackers reveal a stepping out from traditional stereotypes and were seeking 'real' relationships with local people and fellow travellers.

While it was not investigated in this research, the nature of human relationships clearly has implications for service expectations (dependency and the desire for needs to be anticipated and catered for) and the likelihood of tourist complaint behaviour (highly unlikely within the assigned 'role' as group member/tourist).

## **7.12 Final Discussion**

### **World-view...**

The five cultural assumptions that structure the preceding discussion together constitute a world-view. World-view is a culture's orientation towards humanity, nature, the universe, life, death, and other philosophical issues that influence how we see the world. World-view influences the deep structures of society, our perceptions and, consequently, strongly affects our belief and value systems. An understanding of world-view is necessary in understanding a culture's most significant values, and thus how and why members of a culture behave as they do.

Religion is a predominant element of culture determining world-view (Durkheim 1968, Weber 1963). According to Durkheim, the elemental categories in which we think – time, space, number, cause, class, person, totality – have their origins in religious life (1968). The preceding discussion is intended to draw attention to and enhance our understanding of these religious and other elemental categories that determine the Japanese world-view and subsequently inform values and behaviour. This thesis posits that without the context and understanding of world-view one can not meaningfully interpret or compare values and behaviour across cultural groups. It proposes the model offered as providing a useful framework in other contexts and cultures to structure consideration of culture, values and consumer behaviour. In essence, the thesis suggests emic analysis of meaning is necessary before etic constructs or measures can be applied and comparisons made across cultures.

Human needs, and to a degree human values, such as security, fulfillment, belonging, etc, may be a function of human nature and thus universal. However, the way we go about satisfying these needs and values is shaped by our cultural world-view. Values are the core of culture, and thus culturally meaningful values do not easily translate. Values have to be labeled, and if the labels are translated but the values are not comparable, the result is nonsensical (De Mooij 2004). The words used to describe values will have different meanings to respondents in different cultures, and no matter how one rephrases a statement,

one cannot eliminate the uniqueness of the meaning inherent in each language (Befu 1989). Thus the pseudo-etic approach to values measurement (i.e., the translation of American value lists into other languages) understandably can result in meaningless comparisons and erroneous conclusions.

Etic studies of universals constitute a legitimate form of social enquiry. However, there are also features of culture only discoverable through emic enquiry. While our understanding of a specific culture increases as we engage in emic analysis, etic comparisons help us to discover similarities and degrees of difference across cultures. There is clearly value in both approaches, each can yield significant results and help deepen our understanding of a specific culture as well as contribute to building social theory (Befu 1989). The issue raised by this thesis is not to argue the value of either approach, but to highlight the misuse of ethnocentric, Western, emic concepts and constructs misapplied to other cultures as if they were etic constructs. Valid etic analysis utilises concepts or measuring rods which are applicable across cultures in search of universals. Unfortunately many existing values scales used are not etic, but emic scales, developed in one culture, and misapplied as pseudo-etic scales across other cultures.

### **The Self...**

This research points to the self or individual as a fundamental construct in investigating values and behaviour. Self is the construct that underlies human motivation; our most abstract beliefs and values are elements of the 'core' self (Walker and Olsen 1991). These self-meanings give a person a sense of unity and identity and influence behaviour across a wide variety of situations. The Western self-concept, however, is an example of a culture-bound concept falsely considered to be a universal etic construct. In Western social science the individual is assumed to be the basic building block of society and is fundamental to social science theory (Befu 1989). However, if one recognises that the concept of self is culturally bound, then a number of the other concepts utilised in marketing research (including personal values) must also be recognised as culturally bound. Consumer behaviour theory is based on the Western view of the individual as an independent, self-contained, autonomous entity. In contrast, the Japanese self has been variously described as relational, interactional, interdependent, particularistic, situational, contextual, relative, collective, group oriented, uncertain, sociocentric. The concept of the individual as the most salient independent unit among the Japanese is absent. The Japanese sense of self is ambiguous; it is

not underdeveloped, but well developed in its own diffuse form. Not grasping this alternative view of self leads us to false dichotomies (such as Individualism/Collectivism), and undermines the cross-cultural validity of consumer behaviour constructs that rest on the concept of 'self' or individual. Values research is one such area of consumer behaviour that demands an understanding of this self concept. The construal of self, and of the relationship between the self and others, has a systematic influence on cognition, emotion and motivation (Markus and Kitayama 1991). Naturally, to apply culturally inappropriate models of psychological organisation to consumption behaviour in other cultures is likely to lead to a distorted picture of that activity (Reisinger and Turner 1998). In misapplying constructs cross-culturally Western social scientists are not discovering etic universals but trying to use Western emic concepts as a framework for understanding non-Western social and cultural phenomena (Hamaguchi 1985).

This thesis argues that the Western ideal of individualism must be reconsidered when understanding cross-cultural consumer behaviour. The I/C construct so commonly applied in consumer behaviour research is built on the intellectual assumption of the separate individual in contrast to the group. When Western academic observers claim that the Japanese (and others) are 'collectivist', have no individuality, or are group oriented, they are referring to the diffuse and interdependent nature of the Japanese self rather than a dichotomous focus on the collective over the individual. It is a valid observation that the individual is relatively independent in American culture, while an individual in Japan is embedded in a more complex network of social relations. However, this is merely a reflection of a world-view in which the interdependent nature of the self is preferred over the individually based rational view of self. The Japanese social unit is not the opposite of the individual but another way entirely of conceiving of the individual. Thus I/C theory is insufficient in explaining cross cultural differences as the dichotomy is a Western construction that overlooks the important antecedents leading to this observed difference in social organisation. The construct has been too readily used to explain every behavioural variation between Eastern and Western cultures (Kagitcibasi 1997), with little regard for why these behavioural variations exist. I/C research often confuses antecedents and consequences and arguments based on the I/C framework are often circulatory (Holden 2004). There has been a tendency to build consensus about I/C through iterative replication or trivial refinement that preclude genuine shifts in intellectual direction (Sullivan 1998). I/C research has linked individualism to affluence (GDP) and modernity (Triandis 1989), clearly reflecting an ethnocentric bias. Data gathered by Japanese



psychologists Hayashi and Kuroda (1997) over forty years (1953 – 1993) show that there has been no significant change in the Japanese orientation towards the self as opposed to the collective despite rapid modernization and economic prosperity. The idea that individualism is related to affluence and modernity are incompatible with their research findings.

### **Language and Thought...**

In addition to the importance of world-view and self concept, this research has identified two other important concepts fundamental to an understanding of Japanese values and consumer behaviour: language and thought patterns. While the debate over the directional influence of the relationship between language and thought is beyond the scope of this thesis, it acknowledges that language in a crucial way conditions our perception and cognition, how we see the world, and how we behave. The Japanese language is characterised by ambiguity and diffuseness. While Western thought patterns are dominated by two key factors – dichotomy in their world-view and individualism – the Japanese language espouses a view of the world in non-binary terms (Hayashi and Kuroda 1997). Likewise, the Japanese language predisposes its speakers to pay attention to human relations or the entire social context rather than just to the self or the individual (Hayashi and Kuroda 1997). The Japanese cultural core is deeply ingrained in its language, which influences its speakers to perceive and structure reality from a different perspective than the English language does.

Research by Nisbett (2004) has shown that Westerners often focus on objects in isolation from context, value a sense of personal agency and individualism, and believe in an ability to control outcomes. The preoccupation with analytic thought, discovery of truth and formal/Aristotelian logic led to modern science. In contrast, Japanese tend to be broader and contextual, they believe events are highly complex, dependent on context and often impossible to control. Their thinking emphasises harmony, holism, interrelatedness and contradiction. Western people believe in straightforward rules, categorisation, determinism and formal logic. Eastern people, in contrast, attend to objects in a broader context, complexity is highlighted and over-concern with logic may be considered immature (Nisbett 2004). There is evidence that these dramatic differences between East and West have implications on cognition, reasoning, emotion and memory. They lead to significant differences in approaches to science, perceptions of control, and inference and logic among other things (Nisbett 2004). The implications of these fundamental differences in thought patterns are twofold: firstly, they have a direct influence on attitudes, beliefs, values and

preferences; secondly, this suggests that the assumptions underpinning Western consumer behaviour constructs and theories are not shared by other cultures in which they are used, thereby threatening their validity and reliability.

This thesis posits that the root of Japanese culture is found in the Japanese language, thought patterns and view of self, which in turn are shaped by world-view. These dimensions constitute the key to understanding culture and values, and without this understanding, cross-cultural comparison is inherently flawed.

### **The Implications...**

Convergence theorists argue that the Japanese value system is gradually shifting towards Western 'individualism'. Indeed the rising number of students enrolled in universities and other institutions of higher education has exposed Japanese youth to individualistic and rational thinking. As Japanese workers become accustomed to material affluence, their legendary work ethic is tending to dissipate and their life styles become more hedonistic (Sugimoto 2003). It has been acknowledged that the Japanese are perhaps losing the sense of devotion to the groups and organisations to which they belong (Sugimoto 2003). However, despite these changes the Japanese individual will remain distinctly Japanese. Despite a high level of industrialisation and 'modernisation', traditional values continue to guide social behaviour (Silver 2002). A religious culture and world-view that upholds individualism as an ideal is necessary for individualism to become the guiding ideology of a nation (Ito 1998), and Japan clearly does not hold such a world-view. The deeply held cultural assumptions and constructs presented in this chapter will not change rapidly, if ever, and while social and technological changes may interact with these fundamental beliefs, the end result will naturally remain different from that of the impact of the same social and technological changes on a different (Western) set of cultural assumptions.

The results of this thesis suggest that Japanese backpackers today are more individualistic than their predecessors and use tourism as a means for self-expression and individuality. The backpacking tourists to New Zealand are more independent and self-directed than the stereotypical package tourists that preceded them, they see the consumption of travel as a way to express independence and individuality (c.f. distinction between individualism and individuality). However, they do not express it in these terms as their self-concept is still intricately embedded in Japanese language, thought and cultural assumptions. However,

despite these changes, the 'traditional' Japanese tourist travelling as part of a group or tour (e.g. honeymooners and package tourist) remain a large and important segment. The values motivating these tourists are more obviously and intricately embedded in Japanese culture, history and social functioning and their tourism behaviour decisions are dominated primarily by 'emic' values only comprehensible within this cultural context. The findings of this research highlight the importance of linking tourism behaviour to the deeper structures of Japanese society and culture, and understanding it within this context.

### **In Conclusion...**

This thesis challenges descriptions of Japan as a culturally homogenous society and the notion of Japan as being 'uniquely unique'. It seeks to avoid the assumptions of those who claim that Japan can be understood fully only with the application of such Japan-specific, emic constructs as those reflected in *nihonjinron* writings. Likewise, it highlights the problems of investigating the Japanese situation exclusively in terms of the concepts and rhetoric of Western social sciences (Sugimoto 2003). It attempts to integrate Japanese emic concepts as well as established etic notions of consumer behaviour research. The findings dispute both those who claim that Japan is radically different from the West and unique, and those who insist that Japan is just like any other country on earth. Japan is unique in some basic ways that separate its culture from those of the West; these basic differences are based in religion and world-view and reflected in Japanese self-concept, language and thought patterns. These are the same constructs that make any culture unique and thus are vital to an understanding of that culture. Meaningful cross-cultural comparison can only proceed from recognition of the deeply held cultural assumptions that shape a culture's values and behaviour. The model presented in this chapter offers a framework to investigate how these assumptions impact on consumer values and behaviour.

## **Chapter Eight – Conclusion, Implications and Limitations**

### **8.1 Thesis Summary**

Values have an important place in the study of cross-cultural consumer behaviour. The literature suggests that values are a central component of culture and therefore a key element characterising similarities and differences across societies. Values have often been used to conceptualise culture's influence on behaviour. (Erez and Earley 1993, Hofstede 1980, Kroeber and Kluckhohn 1952, Trompenaars 1993).

The most popular approach to values research in marketing has been the survey approach based on the work of Rokeach (1973). While value surveys' have been the preferred method of investigating values in cross-cultural consumer behaviour research, there are a number of problems with this approach that have not been widely addressed in the marketing literature. Values are subjective and personal, and thus their measurement inherently difficult. Values research in general faces a number of unresolved issues that threaten its validity: for example, the question of the situational versus transcendental nature of values, the level of value analysis, and values' links to other constructs, including behaviour. In particular, the survey approach to measuring values has not resolved the issues of single values versus value systems, value rating versus ranking, and whether respondents are responding with regard to 'desired' or 'desirable' values. In addition, issues of etic versus emic constructs, ethnocentrism, equivalence, translation, and response sets further complicate the methodological application of value measures cross-culturally.

The LOV is widely employed as a value scale in consumer behaviour research. There is an acknowledgement in the literature of the necessity for a standard cross-cultural values measure, and Kahle (2000) has suggested the LOV as a viable candidate to be a widely accepted instrument for the cross-national and cross-cultural comparison of values. As discussed in Chapter Four, the results of a test of Kahle's LOV in a Japanese sample suggest that, despite its wide and continued use in marketing, the LOV is not suitable as a measure for the cross-cultural comparison of values.

An alternative methodological approach to values research is the Means-End approach adopted in this thesis. Means-End allows respondents to identify themselves the values

relevant to their tourism experiences and provides the researcher direct insight into the link between values and consumption decisions. Besides making explicit the values relevant to Japanese tourism consumption and their link to tourism behaviour, the results of Means-End analysis reveal the importance of cultural beliefs in the application and interpretation of values research.

### **8.1.1 Discussion of Thesis Findings**

This thesis rejects the *nihonjinron* paradigm that asserts Japanese cultural uniqueness and suggestion of cultural homogeneity. The discussion presents an unbiased account of Japanese tourism behaviour that recognises both the common and the unique. People across cultures have widely differing notions of time, space, life and death, reality, morality and philosophy – these notions constitute a world-view. People’s world-view, including relationships with self, others, society, and nature, inform cultural values. Society’s values reflect a particular cultural and physical history and world-view, and are reflected in self-concept, thought patterns, and language. A person’s world-view thus influences the manner in which they understand reality and behave with respect to it. Despite homogenizing trends and surface similarities, cultural distinctiveness persists in values and culture. Values research must not only look at cultural understandings of values but also understand the interconnection between culture, values and consumption situations.

The focus of this thesis is not only to emphasise the uniquely cultural nature of values, but to suggest that an understanding of these values cannot be subsumed within a positivist/empirical approach. While consumer behaviour research has focussed on value scales and direct cross-cultural comparisons of single value items, this thesis argues that such an approach ignores the inherently cultural nature of values. The simple translation and application of Western value surveys to other cultures is insufficient to capture or understand differences in cross-cultural values. For example, while ‘self-actualisation’ can be translated and thus compared across cultures, what is self-actualised will differ depending on the self-construct within a given culture. In the Japanese context the self is not a fixed independent entity but fluid and changing through time and situations; consequently, self-actualisation can only be understood in a communal situation. This thesis draws attention to the social and historical contexts within which values are constructed, and explores their implications on consumer behaviour. It highlights the need to understand the beliefs and concepts of a particular society in the context of the presuppositions of that society. Meaning lies in context,

and therefore all cultures must be understood from within, in their own terms, before comparison can be meaningfully made across cultures. To extract values from culture, compare them (out of context) with values extracted from other cultures, and then conclude that one has found cross-cultural similarities or differences does not reflect social reality (Van Raaij 1978). A prerequisite for legitimate comparison of value importances is that the values compared have equivalent meanings. Barring a reasonable degree of meaning equivalence, comparisons of importance ratings are meaningless (Struch et al. 2002). This research suggests that the assumption of meaning equivalence of values across cultures is unfounded.

The discussion of Japanese values and consumer behaviour represents a holistic attempt to understand and represent reality by studying the meanings that Japanese tourists attach to their experiences and by examining how those meanings cohere and form patterns within the context of Japanese cultural beliefs and world-view. The approach taken can be described as pluralistic in the sense that it combines insider and outsider views, and emic and etic interpretations to provide deeper insights than would be possible by either approach alone. When we ascertain the relations among cultural beliefs, values and behaviour, how they cohere in a logical framework, they become meaningful and understandable to us. The model proposed (Figure Three) identifies underlying cultural beliefs which form the basis of value meanings and importances and consequently have a significant effect on consumer behaviour.

The investigation of values is indeed important in the study of cross-cultural consumer behaviour. However, although personal values may be important in understanding variability across individuals within a culture, this thesis argues that cultural beliefs are of greater importance in understanding variability in consumer behaviour across cultures. Cultural beliefs are the basic beliefs around which values are organised. These beliefs have a defining effect on personal values and individual behaviour, influencing individual consumption behaviour in more fundamental ways than personal values.

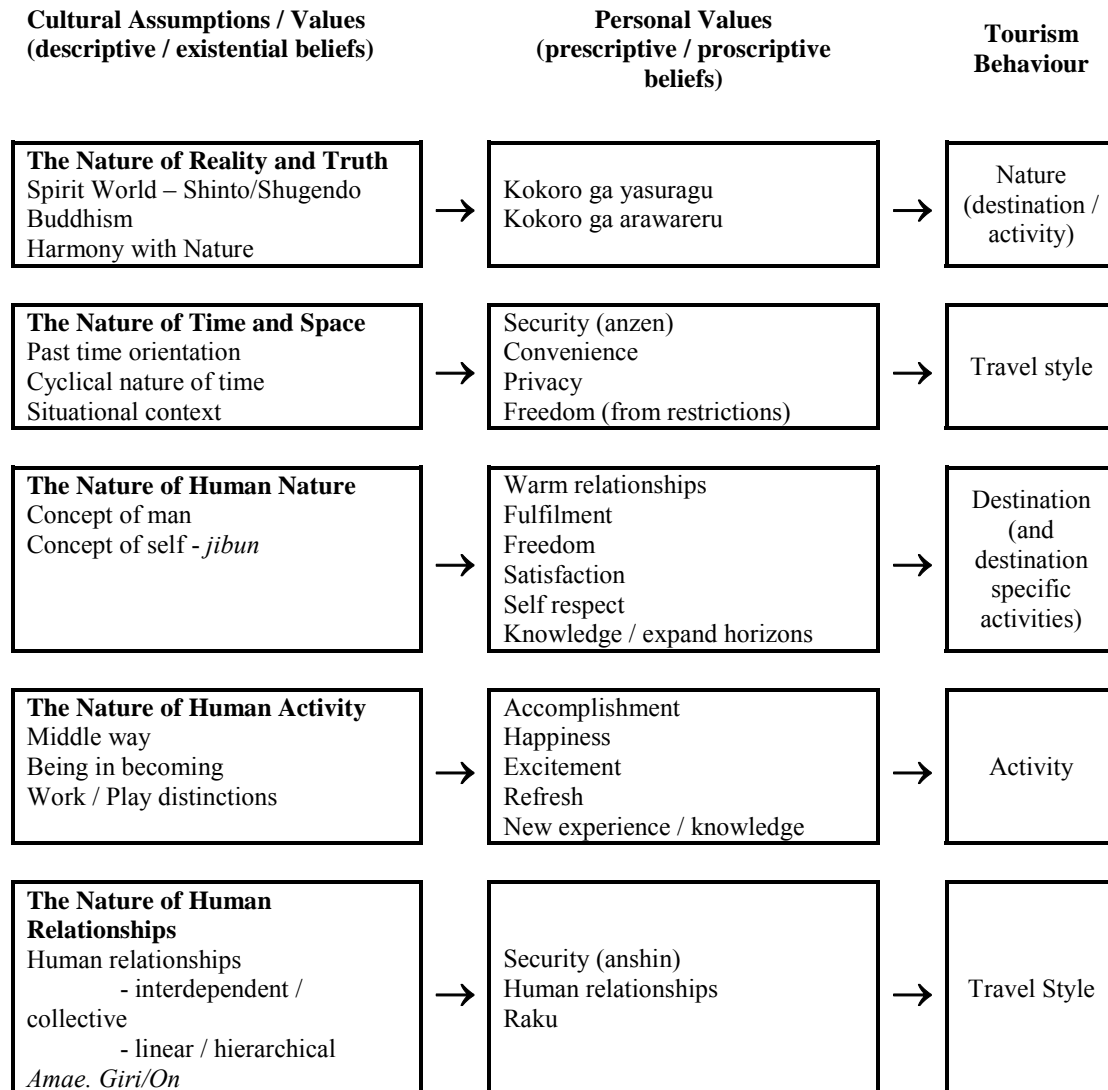
The model proposed in this thesis (Figure Three, reproduced below) integrates the findings of the research. The framework is transferable to other research settings, cultures and domains. It provides a tool to examine the universality of various consumer behaviour models and constructs by structuring examination of the relevant cultural beliefs underpinning those constructs. The framework provides a way of looking at the relationship between culture,

values and behaviour that also extends beyond consumer behaviour and is useful in addressing broader questions regarding cultures' influence on behaviour.

This thesis suggests that there may be sufficiently abstract and therefore truly etic/universal models and dimensions of culture, such as Kluckhohn and Strodtbeck's value-orientations, and this level of analysis provides opportunities for meaningful comparisons and interpretations of cultural differences and similarities. However at the level of individual values, scales such as the LOV do not constitute valid etic measures. The thesis suggests that the more fruitful path to cross-cultural values research will be emic analysis of meaning and discussion of similarities and difference at the level of cultural beliefs rather than individual values. "A knowledge of the basic assumptions of a people is indispensable to the interpretation of concrete behaviour" (Kluckhohn and Strodtbeck 1961:1). This thesis advocates a re-examination of value-orientations in marketing, both in the interpretation of individual values and behaviour, but also to structure consideration of cultural assumptions underpinning research questions and measures when conducting cross-cultural research. It is argued that specific differences across cultures, such as individual values, which are language and thought bound, can not be captured through simple measurement and direct comparison. However, consumer values and behaviour may be made more intelligible to us on the basis of consideration of cultural value-orientations.

Figure 3

### Model of Linkages between Cultural Assumptions, Values and Tourism Behaviour



#### 8.1.2 Summary of Thesis Contribution

The contribution of this research is to identify and understand the values relevant to Japanese tourism behaviour and provide theoretical insight into the link between culture, values and tourism behaviour. The thesis extends the literature concerning methodological issues in values research, offering a test of Kahle's LOV in a large sample of Japanese nationals and highlighting its limitations as a cross-cultural measure of values. The thesis further proposes and applies an alternative methodological approach to values research in a cross-cultural context. The research findings allow a fresh and non-stereotypical look at the modern Japanese tourist and offer insight into two segments of the Japanese tourist market. Finally



the thesis proposes a model to conceptualise the link between deeply held cultural beliefs, values and tourism behaviour choices.

The specific objectives of this thesis were:

- 1 To discuss the limitations of conventional approaches to the study of values and to examine the cross-cultural validity of the LOV scale in Japan
- 2 To establish and apply an alternative methodology to value surveys to investigate the link between values and tourism behaviour
- 3 To provide academic researchers with a framework for conceptualising the relationship between culture, values and consumer behaviour
- 4 To enhance our understanding of the benefits sought and behaviour of Japanese tourists to NZ with respect to Japanese culture and values

Objectives One and Three relate to issues of theory and are addressed in the following section, 'Implications for Consumer Behaviour Theory'. Objective Two is methodological in nature and discussed in Section 8.3 'Implications for Methodology'. Finally, Objective Four relates to 'Implications for Practitioners' and is addressed in Section 8.4.

## **8.2 Implications for Consumer Behaviour Theory**

This thesis highlights the limitations of the current theoretical approach to values research in consumer behaviour. At a theoretical level there is no agreed-upon definition of values and the varying conceptual approaches to the area have not been brought together to yield a domain of cumulative knowledge. The question of whether values are situational or transcendental in their nature is not addressed by the survey approach. Nor does this approach clearly differentiate between levels of analysis or explicate the link between values and other constructs. Further, when applied cross-culturally the survey approach is theoretically flawed. Pseudo-etic measures based on ethnocentric biases are imposed on other cultures and the results compared statistically with no acknowledgement of the suitability of the value items or measures in that culture. The critique of existing value theory offered in this thesis is logical, empirical and epistemological.

The research draws attention to the highly contingent nature of core constructs of Western consumer behaviour theory, such as the individual/self. Virtually every consumer behaviour

theory is culture-bound to a Western conceptualisation of the world and the most fundamental consumer behaviour constructs and theories rest on certain assumptions that are not cross-culturally valid. Empirically based cross-cultural research has been extensive; we have a vast quantity of description of superficial differences but there is a lack of integration and synthesis of these findings. Cultural factors are commonly brought in as explanatory variables in cross-cultural research without any explanation of their origins in the social history of that culture. There is very little understanding of their local antecedents, or of their implications for consumer behaviour. Essentially theory regarding the way culture influences consumption behaviour is underdeveloped.

Western reductionism explains or redescribes phenomenon in terms of the behaviour or properties of smaller entities which constitute it. Holism, in contrast, suggests that phenomenon can be explained by the laws describing the larger phenomenon or greater inclusive whole of which it is a part (Munro 1985). The Western reductionist approach to values has hampered our understanding of culture's influence on consumer behaviour. This thesis advocates a holistic approach to the study of culture, values and consumer behaviour.

The theoretical contribution of this thesis is to propose a model for conceptualising the relationship between culture, values and consumer behaviour. In the context of Japanese tourism the model identifies the antecedents and determinants of tourism-relevant values and their impact on tourism behaviour. In a wider theoretical context, this model offers a framework for integrating and interpreting values within a cultural context and examining their link to consumer behaviour. The model gives researchers a framework to access indigenous meanings necessary for understanding cross-cultural consumer behaviour, allowing closer examination of the local origins of values and the mechanics of their influence on behavior.

### **8.3 Implications for Methodology**

The research draws attention to ethnocentrism and equivalence issues in methods of cross-cultural research. The results of this thesis suggest that the analysis of values via Western positivist empirical scales is inappropriate for the cross-cultural study of values. The model offered in this thesis draws researchers' attention to and makes sense of the complex interrelated cultural factors influencing values and consumption behaviour.

Conventional survey approaches to the study of values have been inconclusive; much of this is due to the methodological approach. At a methodological level self-reporting value surveys are subject to bias and error, making results imprecise. Issues such as ranking versus rating and single value items versus value domains have not been adequately resolved. In a cross-cultural context the survey approach is further hampered by issues of translation, response sets and equivalence. The survey approach to values has been to measure, aggregate and compare consumers across cultures using measures designed in one culture, often with no demonstrated consideration of the validity of the instrument in other cultures. In short, this methodological approach to values research in consumer behaviour has not been successful.

In particular, the LOV as an instrument for the cross-cultural comparison of values is inappropriate. Its limited number of values (which does not include many values relevant in other cultures), its extreme non-redundancy, its reliance on single item measures and the resulting translation issues, suggest that it is not appropriate as a cross-cultural measure (see Chapter Four).

This thesis offers an alternative approach to values research, one that places individual values in a cultural and situational context and adds the respondent's voice in the explanation of the link between values and behaviour. The Means-End methodology addresses the limitations of survey approaches to values and offers researchers a valid methodological alternative.

Methodologically this research serves three purposes. It provides empirical information concerning the limitations of the LOV; more generally it draws attention to the methodological problems associated with cross-cultural research and highlights the cultural biases in consumer behaviour research instruments; finally, it directs future researchers to qualitative methodologies in an effort to fully appreciate and understand the culture of interest before any attempt is made at cross-cultural comparison.

#### **8.4 Implications for Practitioners**

The intention of this thesis was to enhance our understanding of the benefits sought and behaviour of Japanese tourists to NZ in terms of Japanese culture and values. Traditional stereotypes fail to capture the range of experiences and benefits sought by Japanese travellers, particularly those opting for more free and independent travel styles. While it is impossible to generalise 'Japanese tourists' as one homogenous whole, an analysis of values does allow for

a relatively consistent view of benefits sought and travel behaviour decisions of two broad segments of Japanese travellers. The more traditional tourists are primarily seeking escape, relaxation and a desire to reconnect with themselves, others and nature. In order to meet these desires they are seeking indulgence, passivity and relaxation in every facet of their travel. This group is seeking authentic experiences, particularly with nature, but desire the functional aspects of their trip such as accommodation and transportation to be as stress-free as possible and this means culturally familiar. Physical and psychological ease and a desire to be ‘looked after’ are highly important to this group. Tourism operators in NZ must understand these desires in their cultural context in order to provide for these tourists. Practitioners catering to this group should be thoroughly familiar with Japanese culture and offer tourists a ‘japanised NZ experience’. It is suggested that ‘cultural mediators’ in the form of Japanese businesses/shops/restaurants/tour companies and/or Japanese staff are vital to NZ’s success in meeting the needs of the package and honeymoon tourists.

The other segment identified in this study perhaps represent a new wave of Japanese tourists. They differ widely in terms of typical segmentation bases such as interests, demographics and purpose of travel. They are not seeking the culturally familiar; in fact, they are primarily interested in challenging themselves, broadening their horizons and meeting personal needs for achievement and satisfaction. They are seeking authentic experiences and encounters with New Zealanders and other travellers. Tourism practitioners must meet this need for authenticity and provide comfortable, safe and reliable accommodation and transportation options and a diverse range of activities for this group. By providing an authentic ‘NZ experience’ not adapted for ‘the Japanese tourist’, we allow this group to fulfil the personal and very individual values they hold.

#### **8.4.1 Managerial Implications**

Japan remains a key tourism market for New Zealand both in terms of visitor numbers and spending. While they are presently our largest Asian market, NZ is attracting a declining share of the growing outbound Japanese travel market, in spite of the fact that NZ is rated as the seventh most desirable destination worldwide (NZTB 2006). This suggests that there may be a problem communicating NZ’s market offering to potential visitors, resulting in a lower than optimal attraction rate.

While both this research and research by NZTB indicate satisfaction is high and the values of Japanese tourists are being met, it appears we are not communicating New Zealand's offering to potential visitors. That is, while our tourism offering can deliver value to Japanese visitors, we need to better communicate that offering. A clear and compelling proposition is needed for NZ, both to attract Japanese tourists and to ensure that their subsequent expectations are clearly met. This proposition must be realistic and clearly differentiate NZ from other countries. Based on this research it should be possible to create a clear and compelling value proposition to ensure that the potential market understands NZ is capable of fulfilling needs connected to their values.

Currently NZTB's focus is on creating an 'energising' image for the 'interactive' traveller. What appears to define NZTB's 'interactive traveller' is primarily their level of activity (40% more than for other travellers) (NZTB 2006). Instead, this research suggests that activity oriented values, particularly for the older tour market are not key for the Japanese market. They are not seeking 'more' to do, but on the contrary find that the more their travel is peaceful, relaxing and culturally familiar, the more energising it is. While there is a mismatch between NZ's communication and the needs and values of the Japanese market, once in NZ Japanese tourists find the environment satisfies their values. Being present in nature i.e. viewing it (but not being active in it), feeling part of a lifestyle much slower than their own (again through observing), and being taken care of/made comfortable (*raku*) is what this group is seeking. This segment feels alive by a close involvement with nature on a grand scale, rather than activities within nature.

The backpacker market is seeking opportunities for discovery, energising experiences and new perspectives in terms of culture and ideas. However they want to experience 'real' NZ and find great satisfaction in interacting with NZ's people and lifestyle. Again activities are not key for this segment and activity related values are satisfied through the pursuit of personal interests or hobbies available in, but not specific to NZ. Primary values relate to the 'human nature' concept and are satisfied through real connections with NZ itself, its people and its lifestyle.

As NZTB's research suggests, for the Japanese market, NZ lacks 'famous landmarks'. This thesis explains the concepts of *meisho* and *meibutsu* and their importance to travel culture in Japan. NZ could certainly make more of our landmarks by promoting them as 'famous', both

in promotional material and at the sites themselves. Pointing out world heritage sites, national parks, and NZ/ world famous locations is vital to establishing the sites as ‘famous’ and thus encouraging the Japanese market to identify them as worthy of visiting.

This research, and research by NZTB, suggests a spiritual/restorative aspect to travel in NZ for the Japanese market. This thesis has discussed in-depth the values relevant to this and the cultural beliefs underpinning it. Currently NZ promotes the eight *kaido*, which appeals to the idea of traditional pathways and is reminiscent of pilgrimage routes, and this concept could certainly be built on. The concept of pilgrimage and spirituality could be made more explicit, promoting NZ as a location to get in touch with the essence of life through an explicit link to pilgrimage and physical/psychological restoration.

Despite the perceived incongruency of the value profiles of the two segments analysed, the NZ tourist experience is able to satisfy both groups values through the promotion of attributes currently undervalued in NZTB’s communication. A strategy communicating a return to nature, simplicity and people, the ‘essence of life’, would satisfy the values of the two diverse segments discussed in this research. Rather than activity, the ability to interact with the local people and lifestyle and spend time within nature is likely to attract a larger share of these segments to NZ. A campaign based around the value profiles identified in this research is likely to result in a larger portion of the Japanese market considering NZ as a possible destination capable of satisfying the values described in this thesis.

## **8.5 Limitations**

Retrospectively, a number of limitations with this research are evident, and should be considered when contemplating the main findings and implications.

The size of the sample employed in the research is small and while it may have succeeded in capturing the key values of the segments identified, additional values may have become apparent in a larger sample.

The back translation technique could have been further refined to achieve optimal accuracy, i.e the initial translation of the LOV items into Japanese could have been done by a native Japanese speaker.

The research focuses on only two segments of the Japanese market and this may have limited the identification of certain values.

The time of year the research was carried out, i.e. over the winter tourist season, may mean some values particular to tourists in other seasons were not captured.

The laddering technique itself could be considered a limitation in that it may 'force' respondents to reveal relationships between their behaviour and underlying values. However it is believed the soft laddering technique used in this thesis is much less likely to impose relationships than other techniques.

## **8.6 Further Research**

There are a number of future research recommendations emerging from this thesis.

Further laddering interviews with tourists in NZ, particularly in the semi-independent/ self-drive segments could be conducted to extend the current data base of ladders and increase our understanding of this segments values.

Further research could be conducted in Japan to capture values which may not become apparent in interviews in a tourism context.

Further research could consider the impact of the value orientations identified on tourist behaviour not captured in this values research. For example, the impact of beliefs regarding human relationships on expectation of service, and tourist complaint behaviour.

Further research is needed into defining values. The current research suggests values such as 'trying new things' and 'privacy'. While the Means-End technique suggests this is as far as respondents can go in terms of value abstraction it is arguable whether these can be defined as values according to Rokeach's definition, and/or what the usefulness is of a definitive list of values.

The model presented in this thesis may be applicable in other research contexts, and in other cultures, as a framework for interpreting culture's link to behaviour, and thus it opens up opportunities for further research.

Our understanding of the link between culture, values and consumer behaviour is underdeveloped. Clearly there is the need for a synthesis of the marketing literature and literature from other disciplines such as sociology, anthropology and languages in an effort to better conceptualise the complex cultural forces relevant to consumer behaviour.

This thesis highlights the need for further research into the application of Western consumer behaviour theories and measures to non-Western cultures. This would involve the re-examination of the beliefs and concepts underpinning these theories and their applicability in other cultures. Further research is needed to reconfirm the appropriateness/inappropriateness of conclusions drawn from values surveys, particularly in a cross-cultural context.



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## **Appendix A**

Methodological Issues in Using Kahle's List of Values for

Japanese Tourism Behaviour

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**Appendix B**  
**Cover Letter and Consent Form**

## 日本の文化価値観と旅行者のふるまい

私どものプロジェクトに興味を示して頂きましてありがとうございます。  
こちらをお読みいただきまして、もし内容にご納得いただければ、是非ご協力をお願いいたします。もし断られても、まったく問題ありません。

このプロジェクトはオタゴ大学の博士号のResearchの一貫として行われるものです。Researchの目的は、日本の文化価値観と旅行者のふるまいがテーマです。さて、このプロジェクトは1対1のインタビューにより行われ、参加者の皆さんには旅行先、移動手段、宿泊、参加されたいオプションツアー等の質問を30分程お尋ねいたします。

質問の形式はオープン質問形式にて行われます。この形式はより深く内容を掘り起こすのに最適でインタビューの内容により色々な質問へと発展していく方法です。もし、質問の内容に答えたくない場合はその場で、おっしゃって頂いてもさしつかえございません。

インタビューの内容はオーディオテープにて、録音されますが、内容は秘密厳守にて大切に扱われますので、他の目的に使われることは全くございません。

インタビューの結果はレポートに使用されますが、個々の名前や、内容は使われません。もし内容の写しが必要であれば、お渡しいたします。オタゴ大学のResearch結果として、5年間保管される以外はこのプロジェクトが終わり次第、すべての情報は抹消されます（オーディオテープ含む）。

もし質問がございましたら、遠慮なくお尋ねください。

Leah Watkins  
Department of Marketing  
479 8452

Dr Juergen Gnoth(Supervisor)  
Department of Marketing  
479 8446

日本の文化価値観と旅行者のふるまい  
参加者の皆さんへの同意書

私はこのプロジェクトの内容を良く理解し、質問に答えることに同意いたします。  
もし質問をしたければ、いつでも行えると理解いたします。

私は

1. このプロジェクトへの参加は全くの自由参加です。
2. いつでも、このプロジェクトの参加拒否を申し出ることができます。
3. インタビューはオーディオテープにて、録音されます。
4. オーディオテープはプロジェクト終了後オタゴ大学にて5年間保管された後抹消されます。
5. このプロジェクトの質問形式はオープン形式にて行われます。この形式はより深く内容を掘り起こすのに最適でインタビューの内容により色々な質問へと発展していく方法です。もし、質問の内容に答えたくない場合はその場で、おっしゃって頂ければさしつかえございません。
6. インタビューの結果はレポートに使用されますが、個々の名前や、内容は使われません。

私はこのプロジェクトに参加することに同意致します。

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参加者署名

日付



## **Japanese Cultural Values and Tourism Behaviour Cover Letter**

Thank you for showing an interest in this project. Please read this information carefully before deciding whether or not to participate. If you decide to participate we thank you. If you decide not to take part there will be no disadvantage to you of any kind and we thank you for considering our request.

This project is being undertaken as part of my PhD research at the University of Otago. The purpose of my research is to investigate cultural values and their impact on tourism behaviour.

The project will involve a one on one interview regarding travel in NZ. Participants will be asked about destination, transport, accommodation and activity choices and then through the use of open-ended questioning techniques encouraged to identify the underlying values influencing that decision. The interview will take approximately 30 minutes.

This project involves an open-ended questioning technique where the precise nature of the questions which will be asked have not been determined in advance, but will depend on the way in which the interview develops. In the event that the line of questioning does develop in such a way that you feel hesitant or uncomfortable, you are reminded of your right to decline to answer any particular question(s) and also that you may withdraw from the project at any stage without any disadvantage to yourself of any kind.

The interviews will be recorded on audiotapes, which will be heard only by the interviewer and the transcriber. The purpose of the information gathered is to further understand how values are related to tourist behaviour

Results of the project may be published but any data included will in no way be linked to any specific participant. You are most welcome to request a copy of the results of the project should you wish. The data collected will be securely stored in such a way that only those mentioned above will be able to gain access to it. At the end of the project any personal information will be destroyed immediately (including audiotapes) except that, as required by the University's research policy, any raw data on which the results of the project depend will be retained in secure storage for five years, after which it will be destroyed.

If you have any questions about our project, either now or in the future, please feel free to contact either;

Leah Watkins  
Department of Marketing  
479 8452

Dr Juergen Gnoth (Supervisor)  
Department of Marketing  
479 8446

## **Japanese Cultural Values and Tourism Behaviour**

## Consent Form For Participants

I have read the cover letter concerning this project and understand what it is about. All my questions have been answered to my satisfaction. I understand that I am free to request further information at any stage.

I know that:

1. My participation in the project is entirely voluntary;
2. I am free to withdraw from the project at any time without disadvantage;
3. The interview will audio-taped;
4. The audio-tapes will be destroyed at the conclusion of the project but any raw data on which the results of the project depend will be retained in secure storage for five years, after which it will be destroyed;
5. This project involves an open-questioning technique where the precise nature of the questions which will be asked have not been determined in advance, but will depend on the way in which the interview develops and that in the event that the line of questioning develops in such a way that I feel hesitant or uncomfortable I may decline to answer any particular question(s) and/or may withdraw from the project without any disadvantage of any kind;
6. The results of the project may be published but my anonymity will be preserved.

I agree to take part in this project.

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(Signature of participant)

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(Date)