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An Evaluation of the Potential to Develop Inbound Japanese Tourism to Northeast Scotland Using the Thomas Blake Glover Connection

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ABSTRACT

This research explores the strength of the potential niche market associated with the Japanese’s connection to Thomas Blake Glover. The study involved research to ascertain whether there is sufficient demand in Japan to sustain a heritage attraction or trail built up around Blake Glover in Northeast Scotland, as a means to counteract the decline of primary sector industries in the area. More specifically, the research set out to identify strategies to optimise the Blake Glover connection as a resource for Northeast Scotland. The research also highlights issues of significance to the wider Scottish tourism product in terms of attempting to attract the Japanese market to Scotland. Copyright © 2009 John Wiley & Sons, Ltd.

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BACKGROUND

The region of Northeast Scotland is peripheral from a Scottish as well as a British and European perspective. Tourism has been suggested as one means of redressing the problems of peripheral unemployment and decline. This has meant, ‘policymakers have been anxious to find programmes that will respond positively to this problem’ (Rose, 1993, p. 9). This is true in relation to Northeast Scotland, because it is as a result of the economic downturn associated with the primary sector industries of agriculture and farming that policy-makers in Aberdeen and Edinburgh have identified tourism as a means of economic regeneration.

Since the early 1990s and the publication of Alexander McKay’s book ‘Scottish Samurai: Thomas Blake Glover 1838–1911’, various commentators and groups in Scotland have shown an interest in developing the historic link to Japan into a modern tourism attraction in Northeast Scotland. These have included the Thomas Blake Glover Foundation in Fraserburgh, as well as a proposed screenplay or book by a local academic on Blake Glover’s life (Table 1). There have also been some successes with the involvement of Mitsubishi Corporation in purchasing and restoring the Glover family home in Aberdeen for £300,000, as well as several exchange visits between Aberdeen/Fraserburgh and Nagasaki.

This investigation aims to discover whether it is possible to use the Blake Glover connection in order to attract Japanese tourists to the north-east area of Scotland.

The economy of Northeast Scotland

Despite the disadvantages associated with its peripheral location, the region of Northeast...
Scotland does have one major advantage over many other peripheral regions. The presence of oil in the North Sea provides the region with a valuable source of employment and is a physical resource that sets the region apart from many other peripheral areas (Figure 1). There is no doubt that the oil industry has had a pronounced impact on the region’s economy, and it is the oil industry that is responsible for the two micro economies that are evident in the region, Aberdeen City and Aberdeenshire (which includes Fraserburgh). There is a realisation by the Scottish Executive (2004) that there is a need for strong economic rejuvenation in the Aberdeenshire area, although this is being largely masked by the strong economy of Aberdeen City.

In the more peripheral areas to the north and west of the region, the local economies still tend to be dominated by the declining industries of agriculture and fishing (Nash and Martin, 2003). Fraserburgh is the second largest town in Aberdeenshire and is situated in the north-east of the region. The town is peripheral in all senses of the term, and the local economy is dominated by the declining industries of agriculture and fishing. ‘Agriculture is the dominant economic activity across large tracts of the region. It is clear that the economic, social and ecological future of a large part of the area is closely tied to the agricultural industry’ (Scottish Office, 1994, p. 11). The fishing industry has historically been a major employer in the more remote areas of the region, but tighter fishing regulations and closed fishing areas have had a particular impact on the north-east of Scotland in recent years (Stead, 2005). In the ten years from 1993, the Scottish fishing fleet has reduced from 1333 to 763 vessels (Stead, 2005). This has had far reaching negative economic consequences in this region.

As with other peripheral areas, tourism has been suggested as a means to help counteract the economic decline of the region. However, the area’s tourism industry is ‘very under-developed in the northern part of the region where visitor numbers are low and there is a lack of major visitor attraction and appropriate
hotel/guest house accommodation’ (Scottish Office, 1994, p. 17). The benefits of tourism to rural areas have been well documented, specifically in the context of economic opportunities (Hampton, 2005), job creation opportunities (Walpole and Goodwin, 2000), associated multiplier effects and increasing awareness of cultural, heritage, and natural conservation and regeneration (Garrod et al., 2006).

**Niche tourism**

In marketing terms, ‘niche’ refers to a specific market segment that displays particular needs or requirements. It is an alternative to traditional, homogenous holiday products. Consumers today wish to be treated as individuals and the traditional mass market holiday product does not meet this requirement. According to The Earl of Glasgow, ‘there are all sorts of tourism. There is golf tourism, green tourism and, in Scotland anyway, more specialist forms such as fishing, stalking and grouse-shooting tourism. Bucket-and-spade and beach tourism have been declining for a long time for obvious reasons’ (Hansard, 2009). Lindsay (2007) argues that niche markets are an inevitable result in any mature marketplace. She argues that all markets gradually evolve to become narrower and more individual. The
reasoning is that increased competition in a mature market raises quality to a degree that it becomes necessary to differentiate products and target narrower markets in order to compete successfully. Dalgic and Leeuw (1994) also describe the niche market in terms of the product life cycle and suggest that most products and markets start out as a niche market. If the original niche market is successful, and it prospers, then over time, it will in fact evolve into a larger (possible mass) market. Some tourism examples include adventure and activity niches, the grey market, the Pink Pound, and specifically in Scotland, the Malt Whisky trail has proved to be a very successful example of niche tourism. Trunfi o et al. (2006) discovered a substantial niche of foreign visitors to southern Italy. The foreign visitors were attracted primarily by natural attractions and food experiences. Similar niche offerings have developed in France, Australia and New Zealand, with the focus very much on gastronomy. Examples of niches focusing on specific personalities in the UK would include William Wallace and Stirling, Beatrix Potter and the Lake District, James Herriott and The Yorkshire Dales, Robert Owen and New Lanark, Robert Burns and Ayr (as well as other destinations). The work undertaken by tourism providers to showcase their destinations through these characters has resulted in the development and consolidation of a niche tourism identity. This identity initially appeals to a domestic market whose interest is heightened through various media sources and is later supplemented by international visitors through increased access to guidebooks and online information sources.

The purpose of niche markets is to reach a new market segment and ensure an acceptable return on investment, and niche tourism has been identified as being extremely important for the Scottish tourism industry (Department of Culture, Media and Sport, 1999). Dalgic and Leeuw (1994) suggest it is important that Scotland appraises which niche markets it is in a position to focus on. Such markets would include wildlife holidays, genealogy and golf. These markets reflect the natural and historical attributes which Scotland has to offer. This is supported by Dunlop (2008) who suggested that the niche market of ‘golf tourism is seen as one of the major markets which Aberdeen-shire and the north-east of Scotland wish to exploit further. Golf tourism in the area can be expanded through continued product development and greater marketing effort’. In 2004, it was estimated that ‘foreign tourists spent £30 million on golf holidays in Scotland’ (Enterprise and Lifelong Learning Committee, 2004). The same report outlined some characteristics of international golfers, which further emphasise the value of this niche market. International golf tourists spend between £800 and £1300 per visit and also tour widely throughout the country, which allows tourist money to be spread away from the major tourism centres such as Edinburgh. A recent report by KPMG Advisory Services (KPMG, 2008) also points to the economic benefits, ‘golf is seen as a lucrative form of tourism by many countries’.

The Japanese outbound tourism market

According to Mok and Lam (2000) Japan has emerged as Asia’s highest generator of outbound tourists. The Japan Tourist Board (JTB) (JTB, 2004) suggests that as many as 40% of Japanese people expressed the desire to travel internationally. This dramatic increase in the number of outbound tourists from Japan has been commented on by Gilbert and Terrata (2001, p. 70) who comment that ‘over the past 25 years the Japanese representation in the international tourist market has been steadily increasing.’ In addition to this Gilbert and Terrata (2001) suggest that the UK has increased in popularity and currently matches the requirements of the Japanese tourist in that it offers traditional culture and nature as positive attributes, that outweigh the negative attributes of cost and distance. This is supported by Anderson et al. (2000) Mok and Lam (2000) and Yamamoto and Gill (1999) who also suggest that the Japanese visitor is likely to favour a destination whose tourism product is based on culture and landscape. The JTB (2004) suggest that the choice of destination is strongly influenced by natural scenery, shopping, historic and cultural attractions. Rea (2000) suggests that as well as the landscape and nature, there is a desire among the Japanese market for discovery of the environment, associated with literature, such as Beatrix Potter, in
the Lake District. He comments that this type of tourism accounts for 80,000 visitors to Potter’s Hill Top cottage each year, of which one third are Japanese. This has possible implications for a Blake Glover heritage development in the Fraserburgh area. According to Anderson et al. (2000, p. 130) ‘the importance of the Japanese market to Scottish tourism has been in the value of expenditure, rather than volume, as Japanese visitors to Scotland only comprise 2% of the total 1.96 million overseas arrivals’. This is supported by Rea (2000, p. 640) who states that ‘the Japanese tourists are ‘ferocious spenders.’

Anderson et al. (2000) point out that there are also negatives associated with Scotland as a potential tourism destination for the Japanese visitor. First, a visit to Scotland by the Japanese market is likely to be part of a wider UK visit and ‘Scotland’s strength as a separate brand in Japan is questionable’. Second, Scotland is not viewed as a primary destination (partly due to its peripheral location) and instead tends to be viewed as a secondary destination by the Japanese. This has major implications for Aberdeenshire because Scotland is a secondary destination and Aberdeenshire is considered to be a secondary destination within Scotland (Nash and Martin, 2003). A further issue for the Aberdeenshire region is also commented on by Anderson et al. (2000), and this is the importance of the landscape and the scenery for the Japanese visitor. While these are positives for Scotland as a whole, they are problem areas for the Aberdeenshire region, where the area’s scenery and image are not comparable to other destinations in Scotland such as the West Coast, the Highlands or the cities of the Central Belt (Nash and Martin, 2003). Finally, Mok and Lam (2000) point out that cost and value are important considerations for the Japanese market, and these are problems for the Aberdeenshire region, where there are issues associated with high costs (because of the then influence of oil) and perceived low levels of value (Nash and Martin, 2003).

The Japanese travel market tends to be dominated by group-oriented travels. March (2000, p. 188) points out that 70% of overseas travelers travel in groups rather than independently. However, the JTB (2004, p. 43) point out that ‘the gap between package tours and individually arranged travel is closing with 62% of respondents wishing to use package tours and 30% wishing to be independent travellers’. An important point for this research is that the outbound travel market is dominated by a small number of large wholesalers. According to March (2000, p. 189) ‘the top eight wholesalers account for approximately 65% of the outbound market’. Murphy and Williams (1999) also note the important role played by tour operators in Japanese outbound tourism. They insist that any attempt to market rural areas to Japanese tourists must include proactive targeting of these major tour operators. This is a key point and, as discussed in the methodology section, five of these eight large wholesalers were involved in this research. Despite the dominance of the wholesalers, there is a trend towards greater independent travel, with more and more Japanese choosing not to use the package holiday (Yamamoto and Gill, 1999).

Economic downturn

The global economic downturn has had a major impact on the Japanese economy and according to Royal Intel (2009) has caused a ‘major slump in Japanese outbound travel’. This has prompted several of the country’s international and domestic carriers to seek government financial aid. The drop in Japanese passenger numbers is worse than that of the September 11 aftermath. According to Moodie (2009),’November proved to be the worst month of 2008 to date for Japanese outbound travel with overseas traffic declining by -14.07% year-on-year’. With the financial crisis worldwide worsening, market indicators suggest overseas travel will continue to fall. The travel industry predicts the worst is yet to come. Moody continues to point out that ‘Japanese consumers are reluctant to travel as the country’s fl ailing economy has prompted concerns for their financial health and employment security following the financial crisis in the US, which has spread worldwide’.

In a debate in the House of Lords on the future of tourism in the UK, the Earl of Glasgow suggests that ‘a World tourism and travel study has forecast that, over the next 10 years, the UK tourism industry will be one of the

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Developing Inbound Japanese Tourism to Northeast Scotland

worst-performing in the world. The study predicts that out of 174 countries, the UK will experience the 10th-worst level of tourism-revenue growth, and a 20% decrease in global market share. Every year, we attract a smaller share of the world market’ (Hansard, 2009). In the same debate, Lord Pendry commented that ‘British tourism can thrive only if the Government are prepared to invest more money in the industry. Yet VisitBritain, whose job it is to sell Britain abroad, has recently had its budget cut from £49.9 million last year to £40.9 million in 2010. Surely it needs more money, not less’ (Hansard, 2009). In conclusion to the debate, it was pointed out that ‘tourism is being hit alongside other important industries and will continue to be hit for some time because of the downturn in the economy’.

From a Scottish perspective, VisitScotland’s chief executive Philip Riddle recognises the link between economic conditions and the success of the Scottish tourism industry (BBC, 2008). This current economic situation is not to say that Scotland will ultimately lose out in terms of tourism. The indications are that the economic downturn will impact on UK resident’s outbound travel, and there will be an increase in the number of domestic tourists staying in the UK. Lord Inglewood (Hansard, 2009) suggested that ‘although some of our current customers will cease to be customers, as they will have less money, many new customers may be available, as I am afraid that many people who have gone abroad for their holidays will find themselves priced out of the market and will decide to take a holiday at home’.

It must be borne in mind that about 90% of all tourists to Scotland are from mainland Britain (Scotland and England in the main). While the loss of international arrivals will be significant, it is likely to be offset by an increase in domestic tourists. VisitScotland (2007) suggests that the majority of visitors live within three hours of Scotland. This reflects the growing importance of domestic tourism and the greater links between Scotland and mainland Europe. They also suggest that there is unlikely to be any reasonable increase from Asian markets for many years. This finding in itself gives an extremely pessimistic view of the potential of attracting Japanese visitors to the north-east of Scotland, either directly from the Blake Glover link or any other marketing strategy.

METHODOLOGY

In order to build up a picture of what information on Scotland as a tourism destination was available in Japan, secondary data was collected, including travel brochures, newspapers, magazines and other literature on the Internet at the JTB Travel Library (Tokyo) and the Newspaper Library (Yokohama). Major tour operators included information on their websites and in their tour brochures about the areas where they operate tours, and a content analysis of information found only a brief mention of Aberdeenshire, and this was involved with distilleries.

Much of the data collected in this research was elicited using qualitative techniques, and according to the Research and Development sub-committee on qualitative research, ‘qualitative research normally works with small samples of consumers’ (1979, p. 114). The samples chosen for interview in this research were selected purposively and not by formal statistical sampling. Curtis et al. (2000, p. 3) point out that purposive qualitative samples are typically small and generate large amounts of information. During the respondent selection, a list was drawn up using key informants. The snowball technique was utilised in this research and Fink suggests that ‘this type of sampling relies on previously identified members of a group to identify other members of the population. As newly identified members name others, the sample snowballs’ (Fink, 1995, p. 19). The snowball sampling strategy identifies multiple informants, which according to Johnston et al. (1999) goes some way in negating the criticism levelled at single key informants.

The method of qualitative primary data collection used was the face-to-face semi-structured interview. This was because the standardisation of the questions facilitated analysis (although it was recognised that the analysis of open-ended responses can be difficult) and also the ability of the interviewer to follow up any points of interest. Semi-structured interviews with tourism professionals, academics, the Director of Glover...
Garden and members of the Nagasaki City Tourism Department were conducted in Tokyo and Nagasaki. It was felt that a level of personal contact would be essential for this research because of the nature of the data being collected, and because the Japanese respondents would be more receptive to a personal approach. This qualitative data was then analysed using pattern matching, where key themes and issues were highlighted. Yin (1993, p 19) suggests that case studies (such as Glover Garden’s) are well suited to ‘take advantage of pattern matching techniques’. Pattern matching involves comparing, or matching, several pieces of information from the case study in an attempt to either import or export lessons. It involved matching the emerging patterns associated with the individual respondent’s feedback. In addition to the respondent interviews outlined above, five other responses were collected by one of the respondents from members of his organisation (Japan Association of Travel Agents). The five respondents represented the largest tour operators in Japan: JTB World Vacations, Kinki Nippon Tourist, Nippon Travel Agency, Hankyu Express International and Nippon Express. This is an important point because (as mentioned in the above section on the Japanese customer) the outbound market is dominated by eight wholesalers, and five of these were respondents for this research. The importance of these wholesale respondents is backed up by Mok and Lam (2000) who comment that the tour wholesalers are very important and influential in the outbound tourism market.

Quantitative data was also collected using administered questionnaires. The questionnaires used were developed from secondary data and informal discussions with members of the Blake Glover Trust in Fraserburgh. The questionnaires were translated into Japanese and were used to collect data from visitors to the Glover Garden in Nagasaki. (The Glover Garden is an extensive site spread over a steep hillside in Nagasaki. The site lies near the mouth of Nagasaki Harbour and has stunning views over the harbour area.) The questionnaire was made available to visitors in a rest area inside the garden. These visitors were considered to be appropriate respondents, because it was suggested that the visitors to the garden were attracted as a result of their connection and affinity to Blake Glover. These visitors would have included university and school students as well as local residents and members of the public, with a special interest in Blake Glover. A total of 265 valid questionnaire responses were collected (146 from the local region of Kyushu, and the remaining 119 responses were from the rest of Japan). These were analysed using SPSS (IBM) and the results and discussion are reported below.

Members of VisitScotland, being the organisation responsible for marketing tourism in Scotland, were interviewed to obtain their views on the potential development opportunities associated with Blake Glover. This was an important stage in the research, because VisitScotland who would be responsible for the marketing of any such development related to Blake Glover.

RESULTS AND DISCUSSION

The results and discussion of the primary data collected from the interviews and the administered questionnaires are synthesised and reported below. Figure 2 shows a map of Japan and the regions from which the majority of the respondents came from.

Number of visitors to Glover Garden

The dramatic increase in visitor numbers to 2.66 million in 1990 (see Figure 3) was the result of the Nagasaki Expo held that year. The figures for 2003 were 951,875. According to one of the respondent's, one reason for the decline in numbers was that the Glover Garden does not compare favourably with other heritage sites in Japan and abroad. Another respondent suggested that this is compounded by the fact that there is little tourism expertise at City Hall, and there is also little active tourism promotion of the gardens in Nagasaki.

Reasons for visiting the Glover Garden

Approximately, 70% of the visitors were individual visitors, and the remainder were groups, including children on school excursions. May and September are the peak periods for school visits. The fact that the majority of the respondents were first-time visitors (see Figure 4) is
supported by the responses from the qualitative interviews that suggested that most visitors to the gardens are first-time visitors. However, local (Kyushu) visitors tended to have visited the gardens more than once, but not as a result of the Blake Glover link; rather, they visited relatively frequently because of the location of the gardens overlooking the city and harbour. This also supports the comments from the qualitative interviews, which suggested that the main motivation for visiting the gardens was to admire the views of Nagasaki harbour, the city and the hills surrounding the city (see Figure 4). This is a key finding and suggests a relatively low level of interest in the Blake Glover connection with the gardens. This is a cause for concern in terms of the focus of this research.
What do you know about Thomas Blake Glover?

This question is a major point for this research in that the development of any trail, or attraction related to Blake Glover, would be built on the Japanese market and the willingness of the Japanese visitor to travel to the north-east of Scotland to pursue their interest in Blake Glover. However, despite all the secondary feedback (from members of the Blake Glover Foundation in Fraserburgh) and the amount of published literature about Blake Glover (circa 300 publications in Japanese), the majority of the respondents knew little or nothing of Blake Glover (see Figure 5). This surprising information is supported by the responses to the qualitative interviews. The responses tended to suggest that there was some name recognition of Blake Glover but little real knowledge. What knowledge there was appears to be in the area of his entrepreneurial skills and his links with Madame Butterfly. It is no surprise that the local visitors from Kyushu have more knowledge of Blake Glover than the visitors from the rest of Japan, but again the level of this knowledge was not high (see Figure 5). This is a major finding for this research given that the focus of the research was to look at the possibility of developing a trail or attraction based on Blake Glover. The limited knowledge — or interest — in Blake Glover suggests that the development of such an attraction (or trail) would not be sustainable.

Reasons to visit Scotland

The findings in Figure 6 emphasise the literature, in that the main attractions for Scotland
are the scenery and culture. The responses to shopping also reflect comments by the JTB (2004) and the responses from the tour operator respondents in this research. The limited attraction of golf also supports the JTB (2004), but it is surprising in that Yamamoto and Gill (1999) have pointed out that playing golf has become a social status symbol in Japan. It is also a disappointment considering the well-developed niche market associated with golf in Scotland. However, seasonality is also an issue with golf in Scotland, and the difficulty in getting access to the premier clubs in Scotland may go some way to explaining the lack of attraction to golf in Scotland. It was pointed out by one of the tour operator respondents that ‘once the Japanese visitor has been to the UK (Scotland) they are keen to return (60% of visitors wish to return to Britain) so second or third time visitors could be targeted in an attempt to establish a brand loyalty’. It was also suggested by one respondent that ‘shopping, culture and heritage, as well as seasonal products, events and places, which can only be experienced in a particular season, such as Hogmanay or the Edinburgh Festival, should be marketed’. Qualitative responses suggested that word of mouth is important to establish a reputation with the Japanese market. Tourism in Japan is about going abroad for an experience, for example, trekking, learning about plants or photography. Quick tours are no longer popular, and spending two or three nights in one place is preferred. Because Japanese tourism is divided between short-stay travel and long stays (one to three months), emphasis could be put on Scotland (and the UK) as a long-stay destination. This is the favoured type of stay for the over-50 group, and it is this group that has the most potential for the UK, Scotland and the Aberdeenshire region. This is also something that could work in Scotland’s favour, given the distance travelled, and the fact that a visit to Scotland is often part of a wider UK/Europe visit.

In general, there tends to be a relatively low level of awareness of Scotland as a distinct product, and it is often not distinguished from England. Qualitative feedback suggested that the first steps in promoting Scotland as a destination to the Japanese market should be to identify attractive products that would need to be very specifically targeted for a segment of the population. The key is to avoid promoting Scotland as a whole, without differentiation. There should be an emphasis on niche markets and themed travel and there should be differentiation between the Scottish tourism product and the UK and English products. There are possibilities for more tourism from Japan, but the key factors (as mentioned previously) are good hotels, good food and good weather. The internal infrastructure and the quality of accommodation are important, and something
unique should be offered, such as castle hotels.

Further qualitative comments suggested that there are well-established potential growth markets among young Japanese women and visitors in their 50s. The young women tend to visit the cities such as London, but there is potential to attract this market to the cosmopolitan centres of Edinburgh and Glasgow. The senior segment tends to focus on tours of natural and heritage interest, and this is an area in which Scotland have good product offerings. The experiences of the elderly visitors would be greatly improved if there was an effort to improve the linguistic skills of tourism and hospitality operators, because older people in particular, need the Japanese language to facilitate the experience. There is also the opportunity to promote golf as an activity to this particular group, and this should be facilitated by providing golf passes and easier access to premier courses such as St. Andrews.

In terms of new growth markets for Japanese tourist segments, the respondent’s suggested the following:

(1) seasonal products and experiential and themed travel, not simply a collection of sightseeing spots;
(2) the senior segment is buying tours of natural and world heritage sites;
(3) young female office workers are buying extended stays in London;
(4) products that offer a chance to interact with local people (at pubs, for example);
(5) smaller tour groups, limited to a maximum of 26 participants;
(6) tours that make use of unique accommodation, such as country estates and ancient castles;
(7) tours of the countryside;
(8) experiencing film locations, places connected with famous stories (if tour operators had been able to negotiate the rights to promote the UK as the location for the Harry Potter film when it was shot, we expect that by now there would be tremendous demand for England and Scotland among tourists from all over the world); and
(9) gardening (visiting homes to see private gardens).

VisitScotland’s view of Japanese tourist market

The Regional Director of the VisitScotland network has responsibility for the Northeast and Aberdeenshire area, and the data collection consisted of a semi-structured interview at the VisitScotland offices in Aberdeen. The following is a representation of these views and comments.

(1) Japanese tourists were of a high-spend nature in comparison to most other international markets. This market could be of economic benefit to the region.
(2) VisitScotland’s Annual Report insists that vastly increased marketing spending is vital if Scotland is able to compete with alternative destinations.
(3) VisitScotland have finite resources, and there are issues with focusing these resources on the Japanese market instead of alternative, current important markets, such as America and Continental Europe.
(4) Scotland must be aware of the growing challenge from emerging mainland European destinations, which in many cases offer similar historical, cultural and scenic appeals to Scotland.
(5) Currently, VisitScotland’s presence in Japan is limited to small-scale partnerships with VisitBritain. This takes the form of shared marketing material, shared presence at exhibitions and joint communication with major Japanese outbound tour operators. England is a competitor to Scotland as regards targeting international markets, so it is strange that such a joint partnership exists. However, this position is one of realism. Although the high-spend capacity of the Japanese market is seen as potentially important, at the moment, it is felt within VisitScotland that this market is not currently worth the focus of a stronger, independent marketing strategy. Current thinking is that Scotland can best benefit from Japanese tourists by attempting to appeal to a percentage of such visitors to Britain. This strategy reflects a belief that Scotland is not strong enough to appeal to a viable number of Japanese tourists.
(6) It is unlikely that many international tourists would find time to include a trip to.
Scotland within the limited time frames associated with their visits to Europe and the UK. From a Scottish perspective, it is even less likely that Japanese tourists could be persuaded to include Scotland within a trip, and then choose to spend time in Northeast Scotland instead of more recognisable areas such as Edinburgh and the Highlands. This is compounded by the fact that for the majority of Japanese visitors to the UK, the airports of Heathrow and Gatwick are the hubs or the point of entry. This means there is an issue of accessibility from England to Scotland for any Japanese tourist wishing to visit Scotland and the north-east of Scotland. This has pronounced effects on the Japanese visitor’s preference for England as opposed to Scotland as a destination.

(7) Current airline regulations regarding free ‘add-ons’ for many long-haul arrivals into the UK are a problem. This policy sees many international carriers, including British Airways, offer free European flights to customers as part of their overall ticket. For example, a passenger buying a return ticket from Tokyo to London is likely to be entitled to a free return ticket from London to a continental destination such as Paris or Madrid as part of their purchase. However, airline regulations count flights from England to Scotland as domestic, and such flights are therefore not offered as free European add-ons. This situation is obviously of benefit to competitor destinations in continental Europe. This question of greater accessibility (which is common to many peripheral areas) is a barrier to attracting the Japanese market because of the extra cost associated with reaching Scotland.

CONCLUSIONS

The Aberdeen region (especially the more remote regions) is perceived as lacking in regional identity, and as a peripheral region, it suffers from geographic remoteness. Rail and car travel to the region is often slow, and there are few reasons for the traveller to divert from their traditional tourist route to travel through the region. The area is actually seen as doubly peripheral in that Scotland itself is peripheral, and Aberdeenshire is peripheral within Scotland.

In terms of what Japanese travellers think of Britain, there are positives as well as negatives. The positives are that the UK is seen as a friendly destination with good gardens, countryside, traditions and heritage provision, and once visitors have been here, they are keen to return. First-time visitors tend to go to London, whereas the repeat visitors tend to travel further to places such as the Cotswolds, the Lake District and Scotland. There is likely to be a change in the market place, and international travel by the Japanese is likely to be restricted by security concerns, costs, language and the economic downturn. Other difficulties with the Scottish tourism product centre on the perceptions of poor food, bad weather, expense and distance. The Japanese visitor is looking for a unique experience and good standards of accommodation. There is also some good news for the Aberdeenshire region because this research has identified the fact that the Japanese visitor is likely to favour a destination whose tourism product is based on culture, landscape and the environment. As reported earlier, the importance of the Japanese market is not in actual visitor numbers but is rather in the high-spend per head of the Japanese visitors.

Many of the respondents found it difficult to see Scotland as a destination distinct from England. The current joint marketing strategy with VisitBritain can only exacerbate this current confusion. VisitBritain uses London at the forefront of its marketing, then attempts to appeal to different niche markets with different interests, such as history, food, culture, scenery and activities. Scotland is included as one of the ‘secondary’ destinations to London, and while the economic benefits of such joint marketing is understandable, it is questionable that Scotland is benefiting sufficiently from such an approach. It may be that Scottish tourism could achieve greater success by launching an independent marketing campaign in Japan. There are also issues related to the VisitScotland’s policy of limiting the use of their resources to market specific regions to international long-haul visitors. It is sensible for any destination to exploit its most attractive
features in order to appeal to the greatest number of potential visitors, and then attempt to disseminate visitors to more outlying regions. However, it does raise questions as to how important the VisitScotland feels the peripheral areas are, such as the Northeast, in terms of long-haul tourism. It also supports the suggestion that markets such as Japanese outbound tourists are unlikely to become important to tourism in more peripheral areas such as Northeast Scotland.

In terms of Blake Glover as a possible attraction for the outbound Japanese market, it is very much a niche of a niche market, in that Blake Glover might appeal to a small group, of what is a relatively small Japanese market to the UK. There are also very real issues related to the actual knowledge of Blake Glover in Japan. This tends to be limited and, as with the Glover Gardens themselves, tend to be limited to the Nagasaki region. There is a connection with the Glover House in Aberdeen, although the house itself is unsuitable as an attraction for Japanese visitors. That said, the Blake Glover link might attract mature travellers with a connection to Mitsubishi or those with an interest in history. This is mildly encouraging in that currently, the largest travel segment in the outbound Japanese market is the over-50 age group. In terms of co-operation, there are opportunities to improve the links between the Braehead Cottage in Aberdeen, the Glover Garden in Nagasaki, Mitsubishi, the Aberdeenshire Japan Trust and the Thomas Blake Glover Foundation in Fraserburgh. The Glover name and the Glover connection to Madame Butterfly could also be exploited, and there is also the opportunity to promote a Glover Trail in connection with related products such as, Glasgow (shipbuilding and a strong connection with the Japanese Imperial College of Engineering) and Edinburgh (Stevenson and lighthouses), as well as golf.

It is clear that Scotland cannot compete in terms of traditional mass tourism. However, it does have a wide variety of tourism resources that can appeal to a wide variety of tourists who have a range of interests and expected experiences. Niche markets are by their nature ‘narrow’ in terms of the specific criteria that each niche market offers. However, this does not mean that all niche markets are necessarily small. For example, golf tourism as a niche market is now firmly established as an important aspect of the Scottish tourism industry. Blake Glover is another potential example of niche tourism development in Scotland. It was hoped that this would prove a draw for the relatively small number of high-spend Japanese tourists with a very specific interest in this historical subject. However, Blake Glover does not have the recognition or identity that would be needed as a basis for successful niche market development based on his name. It is also debatable whether the establishment of a Blake Glover attraction or Glover Trail would offer the standards and product that would be acceptable to a discerning Japanese market. However, the development of niche markets (whichever ones they may be) should be a proactive strategy and not a reactive measure during times of reduced visitors and revenue.

Current economic conditions, including exchange rates and the worldwide recession, also raise doubts concerning the viability of this market. Economic factors such as sharp declines in house prices and job losses suggest that everyone, including the Japanese, are going to be exercising tighter control over their financial outgoings. There are only limited budgets for marketing, and this means that spending has to be focused on markets which have been identified as being possible of generating a significant return. The Japanese market has not been identified as one such market. ‘The costs involved in attempting to target the Japanese market would be outweighed by the perceived benefits’ (Dunlop, 2008).

It is important to realise that not all niche markets are appropriate to all destinations. An aspect of niche consumers is that they are likely to have very particular requirements when it comes to choosing their destination. Before a destination invests in a potential niche market, great care and a period of critical honesty and realism are required. If it transpires that there is limited chance of achieving a reasonable return on investment, then the destination should decline the opportunity to target the niche market. This point is pertinent to this study. There exists, in the local area, a desire to exploit the link between Scotland, Japan and Blake Glover. The area is rightly proud of Blake...
Glover, but the attributes of the area and the interest and potential visitor demand from Japan means it is unlikely that any development related to Blake Glover will be a success. The product is not strong enough to appeal to what is a small and relatively uninterested niche of a niche.

REFERENCES


