



Japan Media Research Project – Part 1
Conducted on behalf of
The California Travel and Tourism Commission
January 2007

The following Japan media research project was conducted in Japan targeting key travel trade media, consumer travel media, lifestyle media, and TV in January 2007. The survey was conducted with 15 of Japan's leading publications, TV networks, and freelance travel journalists, targeting editors-in-chief and Japan's leading travel journalists.

Please note that this Japan Media Research is Part 1 of a three-part research series which also includes a detailed survey of Japan's top travel agents (Part 2) regarding the competitive advantages and barriers to selling California as a tourist destination in Japan, and a large-scale Japanese consumer research project conducted on-line (Part 3) to assess the positioning of California as a destination among Japanese travelers.

The following Japanese media research report (Part 1) covers the following areas:

- Brief Media Profile of each media and key travel journalists
- Questions posed to each media
- Summary/synopsis of all responses
- Implications for the CTTC Japan PR plan in Japan in 2007-2008

Media Profiles

Travel Trade Publications

- **Travel Journal:** Undoubtedly the most influential travel trade publication in Japan. It covers all travel industry-related topics, is distributed to all travel trade nationwide, and is published on a weekly basis.
- **Wing Travel:** A tabloid-style weekly travel trade newspaper, considered one of the three top travel trade publications in the industry.
- **Chikyu no Arukikata (Travel Guidebook):** The leader among Japanese travel guidebook publishers, with a focus on shopping, hotels, gourmet dining and nightlife in a huge number of destinations around the world. They currently publish a very popular California series of guidebooks that includes "California"; "West Coast USA", "Los Angeles", "San Francisco", "National Parks in the USA", and "Disneyland Resort".



Lifestyle Media

- **CREA Traveller:** A leading consumer travel magazine considered the Japanese equivalent of “Conde Nast Traveler”. Features travel to high-class resorts and gorgeous hotels, destinations world-wide, and is known for its beautiful visuals.
- **Baila:** A fashion/lifestyle magazine for office ladies in their 20s to 30s focusing on global articles including fashion, travel, and stylish photographs taken abroad.
- **Rashin:** A quarterly magazine for more senior readers, focusing on active lifestyles, long stay abroad by retirees, overseas travel destinations, and world cultures.

TV Networks

- **Tokyo Broadcasting System (TBS):** One of the leading TV networks in Japan, with nationwide coverage on a network of 28 local TV stations.
- **Yomiuri Telecasting Corporation:** One of the most influential TV networks in West Japan, which also has a nationwide reach.
- **EX-Entertainment:** A Satellite-TV program which focuses on travel topics around the world targeting Japanese in their 20's to 40's who are interested in new, fun, unique entertainment and destinations around the world.

Travel writers and journalists

- **Ms. Aya Hasegawa :** A freelance travel journalist who specializes in writing for fashion, business, and travel lifestyle magazines.
- **Ms. Chieko Koseki:** One of the famous travel journalists, with especially strong connections with travel magazines and famous women's fashion magazines such as ELLE Japon. Beach destinations are her major area of focus.
- **Ms. Hiromi Haneishi:** A leading freelance travel editor focusing on foods and hotels. Writes for all major travel magazines and travel guidebooks as well as internet travel portals.
- **Mr. Masatoshi Ohta:** A freelance travel editor/journalist who works closely with travel magazines and is known for her work in Japan Airlines' in-flight magazine.
- **Ms. Mitsuyo Tsubota:** A famous travel writer who writes extensively for leading fashion/lifestyle magazines and credit card member magazines.
- **Ms. Naoko Terada:** One of the major travel journalists in Japan with deep connections among all travel magazines and lifestyle/fashion magazines.
- **Ms. Yuri Asako:** A travel editor/writer who worked as a travel agent for 10 years in Japan. Her major connection is with in-flight magazines and credit card member magazines, as well as with major internet travel portals.



Question & Response Synopsis/Summary

I. Have you visited California before? Where? (Multiple Answers OK)

13 of 15 media answered "Yes" to this question with distribution as follows:

Anaheim (Disney Resort)	4
Big Bear	1
Los Angeles	13
Monterey	1
Napa Valley	4
Palm Springs	8
Sacramento	1
San Diego	1
San Francisco	4
San Jose	1
Santa Barbara	2
Ventura	1

→ Los Angeles was by far the most visited destination for Japanese media, with surprising visitation levels to Palm Springs

→ Japanese media visits to San Francisco are surprisingly limited among Japanese media interviewed

→ These results suggest a low level of personal awareness/exposure for California destinations outside Los Angeles/Palm Springs and San Francisco/Napa

→ This conclusion is consistent with all other research results below, and emphasizes the continuing need to expose Japanese media to the breadth and depth of California destinations



**II. When was the last time and how many times have you been to California?
(Only for those who answered “Yes” to question #1)**

11 of 13 Japanese media have visited California more than once:

When	Number of Media
2006	2
2005	2
2004	1
2003	0
2002	1
2001	0
2000	1
1999	1
1998	1
1997	0
1996	3
1991	1

Number of visits to California	Number of Media
1	2
2	2
3	3
4	0
5	2
6	0
7	1
8	2
9	0
10	1

→ 2/3 of all Japanese media interviewed indicated they have not visited California in the past 5 years

→ 6 of the media are considered major California “fans”, having visited California 5 or more times each

→ There are significant opportunities to persuade major Japanese media to refresh their knowledge of California, and to provide renewed coverage from a fresh perspective



III. ***What words come to mind when you think of “California” (unprompted)?***

Listed in order of frequency of mention:

Wine	9
California Orange	5
Sunny	5
Movie Location , Hollywood	4
Warm and Nice Weather	3
West coast	3
Beach	3
Beverly Hills	2
Blue sky	2
California Roll	2
Open-minded	2
Refreshing	2
Surfing	2
Disneyland Resort	2
California Cuisine	1
Celebrity	1
Driving	1
Endless Summer	1
Beautiful Scenery	1
Gorie (!!)	1
Grapefruit	1
Flowers	1
Healthy Image	1
High Tech industry	1
Hotel California	1
Mount Shasta	1
Shopping	1
T shirt + Denim	1

→ **100% of Japanese media interviewed mentioned at least one of the following words in association with California:**

- **Wine**
- **California oranges**
- **Beautiful weather**
- **Movie locations/Hollywood**

→ **These four words appear to be the dominant California images among media interviewed**

→ **It's interesting to note that the two images most associated with California among Japanese media are agricultural products (Wine and Oranges).**

→ **In general the image of California among Japanese media interviewed is extremely positive as a travel destination, with very few images/words associated with the destination among media interviewed**

→ **The image is, however, extremely diverse and suggests the need to develop image branding for Japanese target segments, to more effectively promote California in Japan with more impact**

IV. Please list 5 adjectives which you feel best describe California:

Listed in order of frequency of mention:

Sunny	8
Cheerful	8
Warm	6
Refreshing	4
Celebrity-based	4
Healthy	3
Free-wheeling	2
Active	2
Pop	2
Adolescent	1
Beautiful	1
Casual	1
Close to Japan	1
Colorful	1
Delicious	1
Dreamy	1
Enjoyable	1
Entertainment	1
Frank/Open	1
Generous	1
Good old days	1
Gorgeous	1
Heavenly	1
Cozy	1
Nostalgic	1
Open minded	1
Subculture	1
Summer	1
Vocational	1
Wide/Open	1
Driving	1

→ Adjectives related to the good weather, beaches, Hollywood, and refreshing and healthy images drove the majority of the adjectives associated with California by Japanese media



→ Once again, the adjectives associated with California as a travel destination among Japanese media are very positive

→ The adjectives/images are sufficiently diffuse and dispersed, however, to suggest the need to create major key themes to appeal to the media in Japan to sharpen the image and develop greater impact



V. **Name 5 locations or attractions that you know in California, aside from Los Angeles, San Francisco and Disneyland?**

Listed in order of frequency of mention:

Universal Studios Hollywood	7
Napa and Sonoma	6
Hollywood	5
Santa Barbara	5
Monterey	3
San Diego	3
Yosemite National Park	3
Beverly Hills	2
Knotts Berry Farm	2
Palm Springs	2
Sacramento	2
San Jose	2
Sea World	2
Silicon Valley	2
Big Bear	1
Carmel	1
Death Valley National Park	1
Glass Valley (Yoga farm)	1
Huntington Beach	1
Lake Tahoe	1
Little Tokyo	1
Long Beach	1
Magic Mountain	1
Major League Baseball	1
Modesto	1
Mojave	1
Mount Shasta	1
Newberry Springs	1
Route 66	1
Santa Catalina	1
Santa Monica	1
Solvang	1
UCLA	1
Ventura	1



- *Most media cited either Universal Studios Hollywood or Hollywood*
- *Lifestyle publications/journalists targeting women tended to list Napa, Sonoma, Santa Barbara, and Beverly Hills*
- *Publications/journalists targeting the senior market mentioned National Parks, San Diego, Santa Barbara, Palm Springs and Monterey*
- *Awareness of California besides Los Angeles, San Francisco and the theme parks among Japanese media is still relatively limited, and further efforts and educational programs targeting the media are needed to emphasize the diversity, depth, and power of California as a State*



**VI. Do you think that your readers/viewers are interested in California at present?
Why?**

- Only 3 out of the total 15 Japanese media interviewed, answered “Yes” to this question, which is far lower than we had anticipated
- The 12 media which answered “No” to this question indicated that there was such a California boom in the 1980s in Japan, but the boom has now passed in Japan for the past decade, and so there is a need for a push to be made in Japan to bring California front and center again in the minds of their readership
- All 12 media indicated, however, that when presented with new California story angles besides theme parks and attractions, that they would be interested in once again boosting coverage of California.

→ This supports the conclusion above that the majority of Japanese media have a generally positive image of California and are prepared to develop California features

→ CTTC Japan needs to increase the number of Japan media fans to refresh California’s image among major Japanese media, and to expose Japanese media to a greater range of story angles (see below), starting from one of the gateway cities, and progressing deeper into the state

→ A Japan consumer campaign is needed by California to begin to re-position the destination once again as a “hot” destination for highly trend-conscious Japanese



VII. What elements of California would be appealing to your readers/viewers?

Most of the consumer/ travel media indicated an interest in covering the following story-angles for their readership/viewership:

- Wineries
- Eco Tourism
- Spas/Healthy Living
- Celebrity Entertainment
- Movie Locations
- Wild Nature
- Driving
- Spiritual Power Spots (i.e. Shasta/Cascades)

→ A focus of the Japan PR strategy for 2007-2008 must be to maintain mass market coverage of the gateways and theme park attractions in Japanese media, while incorporating the above themes

→ In addition, a key focus must be to rapidly increase exposure/visibility for the above fresh dimensions of California after validating their effectiveness with the Consumer and Travel Trade research which is currently underway

VIII. What elements do you personally find interesting and attractive about California?

- None of the media listed attractions or theme parks as being of personal interest.
- The themes raised most often by most media/travel journalists included:
 - Nature
 - Long and cozy stay
 - Spa
 - Winery
 - Driving
 - Fashion
 - Surfing
 - Cruises off the coast of California

→ The underlying comment from most media/travel journalists interviewed is that they are well aware of the world-class entertainment available in California, including the theme parks, but that otherwise the brand image of the destination is quite diffuse

→ We await the results of the consumer research with regards to California's brand image in Japan to confirm this input from major Japanese media



IX. How has the image of California in Japan changed over the past 5 years?

- Half of the Japanese media interviewed indicated “No change” in image
 - In the highly competitive outbound Japan market, this cannot be considered a positive -- the image of California’s competing destinations in Japan are constantly evolving and they have been aggressively and pro-actively upgrading their Japan images over the past five years with concerted consumer campaigns

- A quarter of Japanese media interviewed indicated that the image of California in Japan has deteriorated, partly as a function of the declining image of the U.S. as a whole in Japan, and partly due to a letdown from the boom that California enjoyed in Japan in the 1980s:
 - U.S. policies over the past 5 years have not endeared the U.S. with Japanese consumers, and with the after-effects of 9/11 and the Iraq War, the image of the U.S. in Japan has suffered, and image of California as the icon U.S. destination has suffered in Japan
 - In the 1980’s, California was viewed as a “Mecca” of sorts with certain Japanese market segments, and as a highly “aspirational” destination – the positioning of California as an “aspirational” destination has weakened over the past five years in the opinion of a quarter of Japanese media interviewed

- A quarter of Japanese media interviewed indicated that the image of California in Japan has improved over the past five years:
 - California now has more of a glittering, celebrity image due to the power of modern media and of the internet, and this image appeals greatly to music and fashion-conscious Japanese females under the age of 30
 - Japanese are much more aware today of California’s incredible nature, including Napa and Mount Shasta, and this nature is a powerful new dimension
 - California has developed a more cheerful and friendly/laidback image as a result of Gorie as California Tourism Ambassador

→ ***The Japan consumer promotion campaign planned for 2007-2008 must be carefully designed to refresh California’s image in Japan, presenting “New” dimensions of the destination to key Japan target segments, to refresh the destination in the minds of mainstream Japanese segments***



X. Which destinations do you think are the major competitors for California? Why? What aspects of California are less attractive than competing destinations?

Major Competitors	Reason for selecting as a Major Competitor	Which aspect of California is perceived by Japanese media to be less attractive than its competitors?
Asia Beach Resorts		Cost of travel to California is much more expensive / distance / jet lag
Europe		Perceived low cultural maturity compared with long history of Europe
British Columbia Canada		Personal safety / inconvenience of public transportation / high cost
Mexico	Now has direct flight service from Japan, located close to California with similar beaches and weather	California's image in Japan is not as "fresh" as compared with Mexico
Hawaii	The traditional top U.S. destination for Japanese as a beach resort	Few shops speak Japanese compared with Hawaii / Distance
New Zealand	Positive image with world-class wild nature and relaxation like California	California does not have a strong image as a "resort" destination in Japan
Australia	Similar price range as California for package tours and similar images in Japan	Lack of fresh and pure image for California in the Japan market
Las Vegas	Major U.S. destination / Combination of major city gateway with world-class nature (Grand Canyon)	California's image in Japan is more diffuse / California offers almost too many messages
Florida	The weather is similar to California with the same theme parks and attractions	None



- Please note that the above feedback often reflects an individual media/editors perspective -- as often just one media provided its impression on a competing destination. Much more reliable/significant competitor data will become available from the mass market Japanese consumer research (Part 3)
 - The Japanese media interviewed believe that Hawaii and Australia are the major competitors for California.
 - Additionally, Las Vegas, Florida, and Mexico were often brought up as competitors.
- ***The competitive implications for CTTC Japan's 2007-2008 marketing plan are explored in much more detail in the Japan Consumer Research Report (Part 3).***

XI. Which of Japan's market segments do you feel are most attracted to California?

The Japan media/journalists interviewed had quite a consistent view of the most productive Japan market segments for California, listing the four major segments in the following order:

- 1) Baby boomers in their late 50s to early 60s
- 2) Office ladies in their late 20s to 30s
- 3) Females and Males in their 40s to 50s
- 4) Early 20s and college students

→ ***California has so many attractive points that appeal to such a huge portion of the Japanese traveling public – as a result, the target segments are extremely broad-based, covering both sexes and a huge range of ages***

→ ***There is, however, a need to create a more specific appeal point for each of the key Japan target segments, to promote California more effectively to these segments, and increase the impact of the California brand image***

→ ***We present our proposed Japan target segments in the Japan Consumer Research Report (Part 3).***



XII. Have you covered California tourism in your media in the past 3 years? What was the feature about?

- 6 out of the 15 media interviewed (40%) covered California Tourism in the past 3 years
- Story contents were as follows:
 - California driving trip based on the theme of “The Beach Boys”, “Sideways” and “American Graffiti” from Los Angeles to San Francisco (Life style magazine)
 - Southern California focusing on the 50th anniversary of Disneyland in 2005 (Travel Guidebook)
 - Sacramento and the history of the Gold Rush (Travel Trade Media)
 - Tourism feature on Los Angeles and beach areas (Entertainment TV)
 - Disney Resort area and the inner city of Los Angeles (Network TV)
 - Chose California as the featured state when creating a special feature on the United States (Travel Trade Media)

XIV. What would motivate you to feature California in the future?

- Some of the media interviewed are seeking advertising, and will provide advertorial coverage/features on a quid pro quo basis – which until now has not been possible.
- Some of the media interviewed are prepared to generate California features if they are able to join a California media fam
- Most of the media interviewed are prepared to generate significant California coverage based on the following story-angles (also see story-lines above):
 - Driving through California
 - Celebrities
 - Fashion
 - Film Locations
 - Luxury and unique Spa programs
 - Wines

→ Under the new 2007-2008 budget, CTTC Japan will be in a position to significantly increase the number of Japan media fams to California sponsored by CTTC, and this will allow us to greatly expand the amount of Japan coverage in a much greater number of print publications.



→ Under the 2007-2008 Japan consumer promotion, extensive media tie-ups will be a part of the Japan mix, although most Japan media coverage will remain on an unpaid basis.

XV. What kind of support do you wish to receive from CTTC Japan to create more media coverage of California?

Choices offered to media included: a) news releases/newsletters b) editorial contents c) collaterals d) images e) media fams f) seminars g) expanded Japanese web-site h) marketing co-op program i) other

- Most of the Japanese media interviewed were most eager to receive the following support from CTTC Japan:
- news releases/newsletter
 - media fam tour
 - joint media promotions
 - destination images
 - expanded Japanese website

→ CTTC Japan will continue to send out at least one major press release each month, and is considering increasing the frequency of the Japan newsletter beyond the current bi-monthly distribution cycle, given the hunger in Japan and among the travel trade (see Part 2) for new California story angles, updates, and developments. Newsletter sources are only received from HQ on a quarterly basis, and so CTTC Japan will need to work more closely with CTTC HQ and directly with CVBs and partners in California to source powerful information to increase newsletter frequency in Japan.

→ The number of media fam tours in Japan will be expanded significantly in 2007 under the expanded Japan budget -- media fams were not generally possible in the past given limited ability to sponsor air/land

→ Joint media promotions will become possible in Japan for the first time under the large-scale Consumer Promotion, and will allow us to refresh the California image/brand in Japan

→ CTTC Japan recommends development of a new Japanese website modeled on the new CTTC HQ web-site, with an on-line image library for media and consumers.



Research Implications for 2006-2008 Japan PR Plan

- Await results of Travel Trade Survey (Part 2) and Japan Consumer Research (Part 3) before making final recommendations regarding 2007-2008 Japan PR Plan.
- Re-set the target audience based on the results of all 3 research vehicles.
- Set key theme and PR destinations for each of the target segments to appeal more effectively to these segments, and to dilute the “Vague California Image Syndrome” which most media raised.
- Conduct media sales call to respective media for each targeted segments on a regular basis to raise awareness of the depth and breadth of California offerings outside the gateways, but in conjunction with the gateways.
- Provide a greater variety of story-angles and news of interest to major media.
- More aggressively develop media fams with select key media in return for multi-page coverage guarantees.
- Build a stronger network of relationships with regional CVBs to handle the organization of media fams more smoothly.
- Implement a Japan Consumer Promotion and campaign that will raise the visibility of California in Japan, establish key themes, and develop a clearer Brand Image for the state in Japan.
- Implement a wide variety of media co-ops in conjunction with the Japan Consumer Promotion.
- If sufficient budget is available, develop a new newsletter design that will reach more mass market media (see Travel Trade Research Part 2 for a similar recommendation regarding the Japan newsletter with regard to the travel trade).
- Develop a new CTTC Japan website to educate the media, including a photo library.