

Comparative Study of e-tourism between Austria and Hokkaido (Japan)

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Submitted to Prof. Dr. Alfred Taudes

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Preface

Tourism is a complex product. Many suppliers and stakeholders are involved in supply chain. For the customers, it cannot be tested beforehand. There is a distance between the time of purchase and the place when it is utilised. Therefore information is intensively required at the point of planning travel before purchase. Tourism products are dominated by information. Information technologies have accelerated changes in tourism of consumer behaviour and industrial structure.

The internet is used not only for information gathering but also for comparisons with the destination and its products. Potential customers have better access to information resources through the internet than by traditional means. As a consequence, the value of information is decided by the consumer's perception and experience.

On the one hand, information technologies have offered tourism organizations global reach. Destinations can be visible and comparable worldwide through internet permanently. Websites are a significant marketing tool for reaching the bigger market. However it has brought an increase in global competition. The internet has provided opportunities for business growth and threats to the destination management. Currently, organizations who could offer value to the right customer segments and are capable of e-tourism management would achieve tourism objectives successfully.

Austria, one of the leading international tourism countries, is ahead in tourism destination management. Austrian tourism industry is attentive to changes of consumers' demands and building B2C online relationships in marketing strategy. This thesis is a comparative study of Austria and Hokkaido of Japan in e-tourism by means of measuring the competence of tourism organizations through industrial analysis, website evaluation in qualitative and quantitative approaches and systematic benchmarking, and investigating the correlation of e-tourism management and tourism growth of the destination. Accordingly, conclusions will suggest some recommendations to be applied by destination management organizations in Hokkaido.

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Definitions and Abbreviations

ANTO:	Austrian National Tourist Office (Österreich Werbung)
BSC:	Balance Score Card
B2BC:	Business to Business and Consumers
B2B:	Business to Business
B2C:	Business to Consumers
CTW:	City Tourism Website
CY:	Calendar Year
C2B:	Consumers to Business
C2C:	Consumers to Consumers
DMO:	Destination Management Organization
DMS:	Destination Marketing System
EU:	Europe Union
FIT:	Fully Independent Traveller
FY:	Financial Year
GDP:	Gross Domestic Product
HTO:	Hokkaido Tourism Organization
IT:	Information Technology
JNTO:	Japan National Tourism Organization
JR:	Japan Railways
JTA:	Japan Tourism Agency
MLIT:	Ministry of Land, Infrastructure, Transport and Tourism, Japan
NTO:	National Tourism Organization
OTA:	Otaru Tourist Association
OTW:	Official Tourism Website
ÖBB:	Austrian Federal Railways (Österreichische Bundesbahnen)
RTA:	Regional Tourism Authority
RTA:	Regional Tourism Organization
SIC:	Standard Industrial Classification
SME:	Small and Medium Enterprise
SWOT:	Strengths Weaknesses Opportunities Threats Analysis
TB:	Travel Blog
TG:	Online Travel Guide
TM:	Online Travel Magazine

TourMIS: Tourism Marketing Information System
TW: Travel Website
VTB: Vienna Tourist Board (Wien Tourismus)
WTO: World Tourism Organization
WWW: World Wide Web

1. Introduction

Since 2003 Japanese government has endeavoured to develop Japanese international competitiveness in tourism. In order to enhance inbound tourism, the “Visit Japan Campaign” has been launched as part of a national plan with the goal of having 10 million foreign visitors come to Japan in 2010 and 15 million in 2013 [1].

The provisional report for 2010 by Japan National Tourism Organization (JNTO) shows that unfortunately, only 8.6 million foreign visitors came to Japan [2]. In comparison 15.5 million Japanese travelled overseas in 2009 [3], but only 6.8 million foreign tourists visited Japan in 2009 which is less than half the volume of outbound travellers (source: JNTO) [4]. In 2009, bednights by foreign visitors in Japan accounted for only 6 % of total nights. Can we conclude that Japan is really attracting foreign markets?

The World Tourism Organization (WTO) forecasted that international tourism arrivals are expected to reach 1.6 billion by the year 2020 [5]. This figure represents an average annual growth rate of 4.1% between 1995 and 2020. Long-haul travel will grow by 5.4% over the same period by 2020, while intraregional travel will be 3.8% lower than the average annual growth rate. The East Asian and the Pacific regions are expected to show a significant increase, its share will reach up to 25%, and become the second most visited destination worldwide by 2020. Japan is expected to play a significant global role in the East Asian region. Is Japan able to meet such an increase in demand?

Hokkaido is the prominent destination for summer and winter leisure and the second most popular tourism destination in Japan (by bednights) after Metropolitan Tokyo (see Table 4). Hokkaido, however, has a unique character in their source market. Approximately 85 % of visitors are from the Hokkaido local province, 70% are day visitors [6]. As assumed, bednights by foreign visitors accounted for a very small share of the market, approximately 6.4% on average in the past three years from 2007 (see Table 3). Hokkaido and Austria have many similarities. They have a similar land area, are at the same northern latitude and are rich in tourism resources like nature and culture through the year. Also, just as in Austria, since they have been hosts to some of the Winter Olympic games, they have become well-known worldwide as a winter leisure destination. So, why is Hokkaido not as successful as Austria with regards to inbound tourism?

Recent internet technologies (IT) have surfaced as one of the key factors contributing to the growth of the tourism industry (Douglas and Mills, 2004, p272). Tourism businesses are increasingly engaged in e-business models to achieve their marketing goals, where a large number of holidays are planned and transacted. Tourism goes e-business. A lot of tourism literature explored website evaluations using several methods and have noted the potential of websites in tourism business management. Maintaining an effective website has become vital for a business to strengthen its' customer relationships and gain a larger market segment (Law, Qi and Buhalis, 2010, P297). How competent is the information system of Hokkaido?

The purpose of this thesis is to investigate the tourism competence of Hokkaido and examine the correlation of e-tourism management, i.e. information system and tourism growth of Hokkaido. First, the thesis explores the size and structure of Hokkaido tourism industry. Then, other issues affecting tourism are discussed. The findings of industrial analysis would give us an overview of their competence level, and the website evaluation in qualitative and quantitative approaches and systematic benchmarking with Austrian tourism industry would be efficient methods for identifying their strengths and weaknesses. Accordingly, these are expected to suggest some solutions for improvement to be applied by local governments and destination management organizations (DMOs) in Hokkaido for meeting the global tourism growth by 2020.

2. Current Status of Tourism Industry in Hokkaido

2.1 Overview of Hokkaido

Hokkaido is located at the northern end of Japan, at almost the same northern latitude as Austria. Its area is about 78,420 km² (as of 2009) and has a population of 5.6 million (as of 2008) [7] which is the 7th largest province in Japan [8]. These figures are on a similar scale to the Republic of Ireland (70,273 km²/4.5 mil) [9]. Hokkaido comprises one fifth of Japanese land areas, yet only 4.4% of the population lives there [8]. Of concern, is that it is estimated seriously that their total population will decrease by approximately 950,000 people between 2005 and 2030, and the aging ratio will increase by up to 35.6% [10].

The gross domestic product (GDP) of Hokkaido is 19,661 billion Yen in the financial year (FY) 2004, which reached 3% of the national total. Tourism and light industry has increased to such an extent that it is replacing primary industry such as agriculture and dairy farming. Approximately 70% of the employed in Hokkaido are engaged in tertiary industry by the service sector, which contributed around 77% of GDP of Hokkaido [8].

Hokkaido has three coastlines, and is full of natural resources which include six national parks [11]. Such geographical character gives Hokkaido cool dry summers and cold winters which is a distinct advantage as a prominent destination, which attracts leisure tourists for the whole year.

Hokkaido has more to offer than just its fascinating scenery, as each season has its own respective and attractive characteristics. Since hosting the winter Olympic Games in 1972 in Sapporo, Hokkaido has been well known as a popular destination as a winter sports resort. During summer time, tourists can enjoy beautiful meadows and landscapes in untouched nature, hiking and trekking to mountains, native alpine plants, and sky and water sports. As the native inhabitants of Hokkaido, the Ainu are a huge part of Hokkaido's history. However, it is only recently that the Ainu have been recognized as an important part of Hokkaido's cultural heritage. Visitors to Hokkaido can commune not only with its nature but its local native culture with which it's unique lifestyle of local people in harmony. In July 2005, the northernmost peninsula 'Shiretoko' was registered by UNESCO as a natural world heritage [11]. These represent the tourism diversity of Hokkaido.

2.2 Tourism Organizations in Hokkaido

2.2.1 Role of the Local Government in Tourism

On January 2007 “Tourism Nation Promotion Basic Law” came into effect by Japanese government [12], which set tourism business as one of the national schemes;

- To develop internationally competitive tourism and highly appealing tourism destinations
- To enhance international competitiveness of tourism industry and develop individuals who will contribute to the tourism promotion
- To promote international tourism and to roll out measures needed to create an environment conducive to travel

This law specifies that local governments shall work on plans and implement measures, taking advantage of regional characteristics and pursue broad-based cooperation. It has officially identified the importance of tourism and that tourism contributes to local and national economy by generating employment, business opportunities and benefits to the local community. In order to accomplish this law and its action plans such as Visit Japan Campaign in a systematic manner and make coordination across the public and private sectors, the Japan Tourism Agency (JTA) was established as an extra-ministerial bureau under the Ministry of Land, Infrastructure, Transport and Tourism (MLIT) on October 2008.

Consequently, tourism development has become an important administrative module to the local governments who have suffered from impoverished local industry and economy. In other words, tourism business development is the national strategy not only to Hokkaido but also to all potential local governments in Japan, as well as international competition followed by many overseas countries and destinations. Tourism is becoming a real global business just like other mega industries such as automotive and electronic, where the domestic supplier has to compete with long distance destinations (Werthner and Klein, 1999, p38). It should be noted here that Hokkaido tourism is now facing higher global competition.

2.2.2 Tourism Organization Structure in Hokkaido

The “Bureau of Tourism” of Hokkaido is formed by five sub-working groups attached to the Department of Economic Affairs in the Hokkaido Government Office. They are responsible for destination management, planning activities, marketing, training and education in respect of political and legal administration. Their respective function is;

- Tourism Strategy Group: Budget and accounting control, liaison with other departments and organizations, PR and information, application of national measures and policy.
- Network Management Group: Coordination with Hokkaido Tourism Council, marketing and action plans, liaison with other regional tourism bureaus in Hokkaido, statistics and research.
- Tourism Development Group: Development and promotion of tourism products, service and events, human resources and education.
- International Tourism Group: Development of foreign market and promotion of attractive location for convention or congress.
- National Tourism Group: Development of domestic market by promotions

In 2008, the “Hokkaido Tourism Organization” (HTO) was established as a corporate institution to materialize business support of Business to Business and Consumers (B2BC), operating Tourist Information Centres, distributing information as well as website operation management and marketing-promotion activities. The HTO employs 27 people and works as a delegated DMO of Hokkaido. They are an integrated membership union of the tourism service sector across Hokkaido. The total budget for 2009 was 691,439,000 Yen (approximately €5.7 million), of which 75% came from the Hokkaido Government and the remainder was provided by the members of tourism enterprises and sponsors (Source: the Bureau of Tourism of Hokkaido. Email to the author.15 Dec.2010). They bear the core function to carry the tourism action plan suggested by the Bureau of Tourism of Hokkaido into practice toward the market.

The “Hokkaido Tourism Council” is an innovative party directly attached to the Hokkaido Governor’s Office, consisting of fifteen experts from local economy, service and academic sectors to suggest the guidelines for tourism development and to supervise

its process and progress. As the following Figure 1 shows, the triangle network is well-constructed in their operation management.

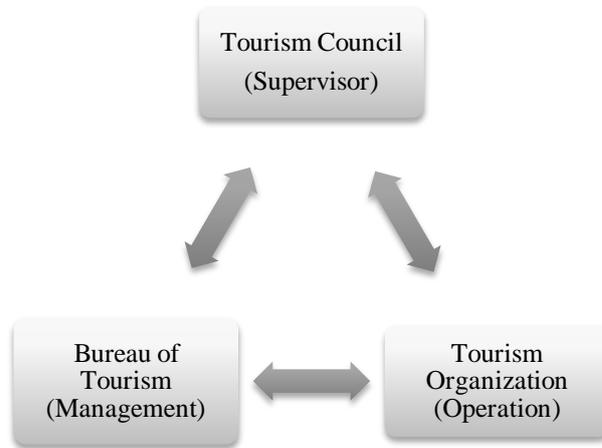


Figure 1: Tourism Organization Structure in Hokkaido

2.3 Current Tourism Status in Hokkaido

2.3.1 Market Volume

Let us examine Hokkaido more closely from the point of tourism trends. In the FY 2009, Hokkaido welcomed 46,820 thousand visitors (absolute number of visitors) [13]. The following Figure 2 and Table 1 show the trend in Hokkaido tourism. When reviewing the statistics, from 2004 onwards, it was clear that the visitors from Hokkaido (i.e. Hokkaido landers), named as “DO-landers”, are the main source market. Around 85% of visitors are DO-landers, of which approximately 80% made a day trip, but didn’t stay overnight. Naturally, visitors from outside Hokkaido, named “Out-landers”, including foreign visitors stayed overnight. By the peak of 2006, however, overnight visitors by Out-landers were shrinking. Hokkaido encounters the difficulty that day visitors dominate the market and overnight visitors are declining.

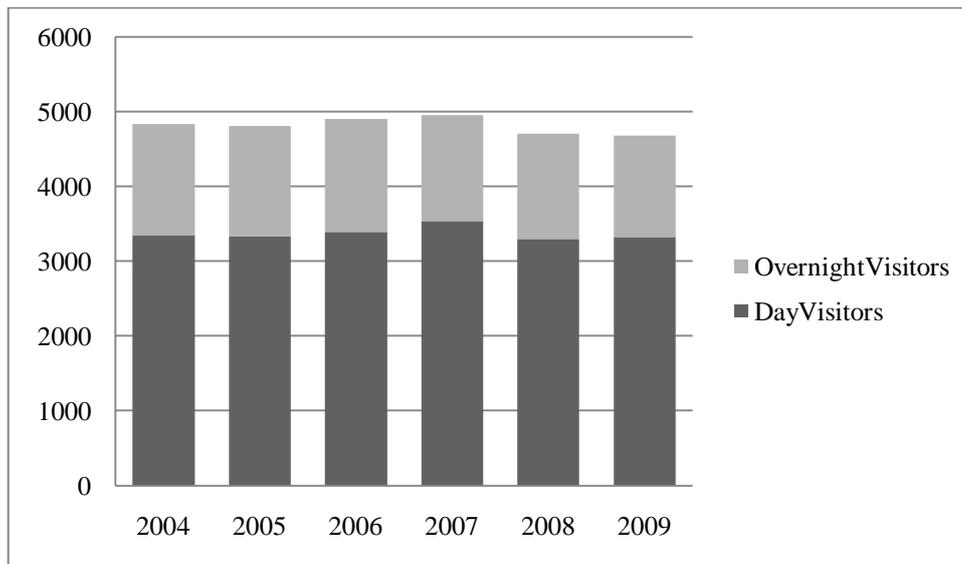


Figure 2: Comparison with Day Visitors and Overnight Visitors in Hokkaido (Unit/ten thousand)

Source: Bureau of Tourism, Department of Economic Affairs, Hokkaido Government, 2005-2010 [13]

Table 1: Hokkaido Arrivals 2004-2009 and its Breakdown (Unit/ten thousand)

FY		Arrivals		Breakdown	
			Share	Day Visitors	Overnight Visitors
2009	Out-landers	597 100%	12.8%	2 0.3%	595 99.7%
	DO-landers	4,085 100%	87.2%	3,326 81.4%	759 18.6%
	TTL	4,682 100%	100%	3,328 71.1%	1,354 28.9%
2008	Out-landers	628 100%	13.3%	2 0.3%	626 99.7%
	DO-landers	4,097 100%	86.7%	3,297 80.8%	781 19.1%
	TTL	4,707 100%	100%	3,299 70.1%	1,407 29.9%
2007	Out-landers	649 100%	13.1%	2 0.3%	647 99.7%
	DO-landers	4,309 100%	86.9%	3,532 82%	777 18%
	TTL	4,958 100%	100%	3,534 71.3%	1,424 28.7%
2006	Out-landers	659 100%	13.40%	2 0.3%	657 99.7%

	DO-landers	4,250 100%	86.6%	3,393 80.7%	857 19.3%
	TTL	4,909 100%	100%	3,395 69.2%	1,514 30.8%
2005	Out-landers	635 100%	13.2%	2 0.3%	633 99.7%
	DO-landers	4,178 100%	86.8%	3,334 79.8%	844 20.2%
	TTL	4,813 100%	100%	3,336 69.3%	1,477 30.7%
2004	Out-landers	632 100%	13.1%	2 0.3%	630 99.7%
	DO-landers	4,207 100%	86.9%	3,346 79.5%	861 20.5%
	TTL	4,839 100%	100%	3,348 69.2%	1,491 30.8%

Source: Bureau of Tourism, Department of Economic Affairs, Hokkaido Government, 2005-2010 [13]

The most popular destination to be visited in 2009 was the capital city Sapporo, followed by Otaru city and Asahikawa city. Table 2 shows that even these popular cities might not always benefit from bednights. Other unknown factors, which we will explore later, may be involved, however one major reason is probably due to the lack of availability of accommodation facilities in each city.

Table 2: Top 7 Destinations in Hokkaido 2009 by Arrivals

City	Arrivals	Total Bednights	Thereof by Foreign	Share
Sapporo	13,014,000	9,483,000	649,210	6%
Otaru	6,870,000	684,000	49,434	7%
Asahikawa	6,365,000	660,000	37,911	5.7%
Chitose	4,955,000	252,000	44,059	17%
Hakodate	4,331,000	4,221,000	131,743	3%
Kushiro	3,320,000	1,189,000	59,999	5%
Noboribetsu	3,023,000	1,168,000	177,346	15%

Source: Bureau of Tourism, Department of Economic Affairs, Hokkaido Government, 2010 [14]

2.3.2 Guest Mix in Hokkaido

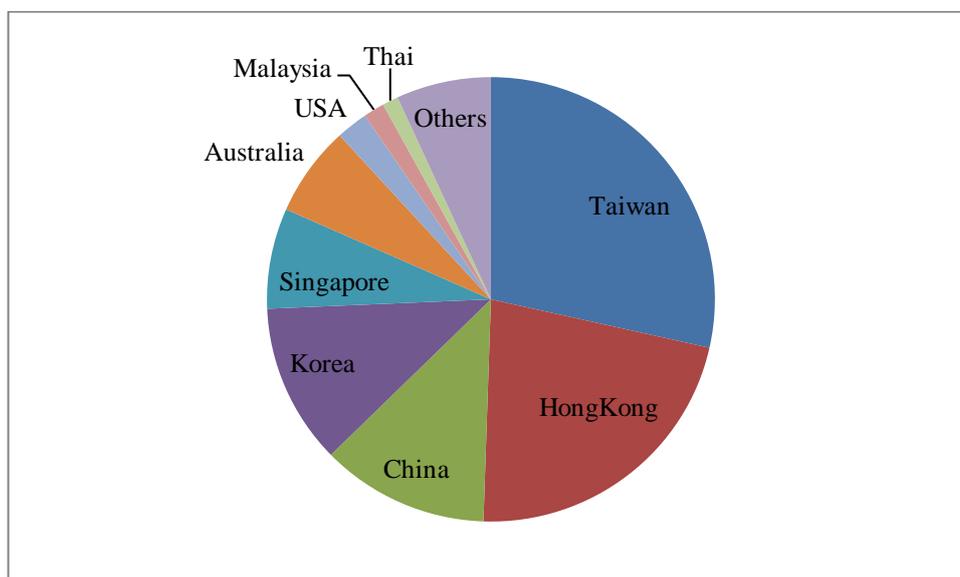
A studying of the figures from the past six years reveals that the total bednights in Hokkaido are decreasing after the peak of 2006. However, the foreign visitors still make up the same small proportion of the volume both in arrivals and bednights since 2007 (see Table 3). The number of foreign visitors has increased from 427,050 in 2004 to 675,350 in 2009 (+ 58.1%), but this makes up only 1.44% of total visitors in 2009.

The Hokkaido market is extremely dominated by the domestic market, and other source markets are particularly Asian neighbouring countries such as Taiwan, Hong Kong, China, Korea, Singapore and Australia as Figure 3 shows, which is the same character as statistics of overall Japan. Russia, England, Germany and France are recorded in smaller amount than the others in Figure 3. It is in a critical condition that over the past six years the market share has been almost unchanged in proportion between domestic and foreign. This is not only due to the lack of direct flight service to/from New Chitose International Airport in Hokkaido.

Table 3: Changes of Foreign Visitors 2004-2009 in Arrivals and Bednights

	2004	2005	2006	2007	2008	2009
TTL Visitors	48,390,000	48,130,000	49,090,000	49,580,000	47,070,000	46,820,000
Thereof Foreign	427,050	513,650	590,650	710,950	689,150	675,350
Share%	0.88%	1.07%	1.20%	1.43%	1.46%	1.44%
TTL Bednights	34,230,000	33,970,000	34,430,000	32,790,000	32,220,000	30,920,000
Thereof Foreign	1,343,152	1,631,178	1,766,650	2,109,681	2,088,309	1,979,431
Share%	3.92%	4.80%	5.13%	6.43%	6.48%	6.40%

Source: Bureau of Tourism, Department of Economic Affairs, Hokkaido Government, 2005-2010 [13]



Figures 3: Guest Mix by Bednights 2009

Source: Bureau of Tourism, Department of Economic Affairs, Hokkaido Government, 2010 [14]

The “Accommodation Survey CY 2009” by MLIT and JTA reported [15] as the Table 4 that the total number of bednights by foreign visitors through 2009 reached 18.2 million. Tokyo leads the ranking of Japanese popular destinations in terms of total bednights and foreign tourist bednights, Hokkaido ranked 2nd in total bednights but 3rd in international bednights. These top three destinations had a share of over 50% of the total foreign bednights market. It is clear just how much Hokkaido contributed to inbound business.

Table 4: Top 3 Japanese Destinations by Bednights 2009 (by province)

Top 3 Destinations	Total Bednights	Thereof Foreign	Share
Tokyo	34,527,190	6,377,700	34.9%
Osaka	15,707,030	1,966,500	10.7%
Hokkaido*	24,564,640	1,806,740	9.9%
Subtotal	74,798,860	10,223,631	55.5%
Others	226,505,080	8,146,830	44.5%
Grand Total	301,303,940	18,297,770	100%

Source: Accommodation Survey 2009 by Japan Tourism Agency, Ministry of Land, Infrastructure, Transport and Tourism, 2010

* The figures were obtained prior to the incorporation of annual statistics on new and obsolete facilities, and shows slight changes from FY figures by Hokkaido Government

2.3.3 Seasonality

Based on the bednights, Hokkaido welcomes tourists intensively in the summer season between July and September. Foreign tourists also visited more in July and August but their peak season is observed in winter as well between December and February (see Figure 4 and Appendix 1). It is characteristic of Hokkaido to hold two peak seasons in foreign markets.

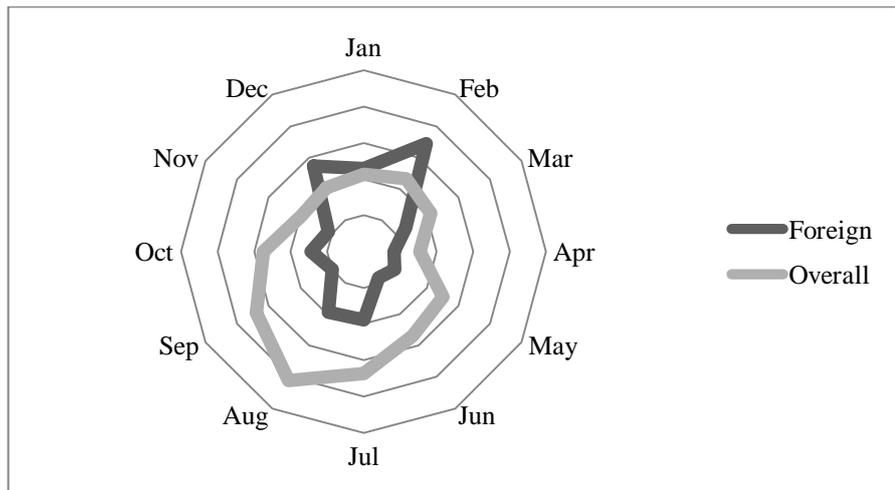


Figure 4: Seasonality Comparison by Foreign and Overall Bednights 2009

Source: Bureau of Tourism, Department of Economic Affairs, Hokkaido Government, 2010 [13]

2.3.4 Demands by Foreign Visitors

The Japan Tourism Agency (JTA) conducted a consumption trend survey among foreign visitors to Japan between April and June 2010 [16]. The HTO also conducted a survey between May 2007 and February 2008 [17]. These surveys examined travel trends and demands, which shall be helpful for comparing trends and to find potential segments for future tourism development in Japan and Hokkaido.

According to this trend survey, the leisure tourists stayed in Japan around 7.6 days on average. The distinct fact was that Asian leisure tourists stayed for quite shorter periods for four to six days, while tourists from western countries stayed rather longer between seven to thirteen days. Particularly, the majority of German leisure tourists tended to stay more than seven days in Japan.

Hokkaido's foreign tourists stayed mostly between three to five days (64.5%).

➤ *potential*: Developing longer stay in Hokkaido and achieving 7 days stay. German and/or western tourists (Australia, USA and Russia) are new target markets.

Leisure tourists from Asia to Japan are likely to accompany family members in participation both of group package tours and fully independent travellers (FIT). In contrast, western leisure tourists are likely to travel alone or accompany with a spouse or partner as a FIT.

60.4% of foreign visitors to Hokkaido travelled by package tour, while 39.6% were non-package travellers.

➤ *potential*: New targets are FIT from Asian and western countries.

To the question "Which source(s) were helpful in obtaining information about your destination prior to coming to Japan?" in JTA's survey [16], internet (27.6%) was the greatest answer, followed by personal blogs (20.2%), word of mouth and recommendations from friends/family (20.2%), the guide books (19.2%), especially Lonely Planet (14.1%), tour catalogues from travel agents (16.3%), and websites of travel agents (15%).

Among foreign visitors to Hokkaido, internet (39.3%) was the most important tool, followed by travel agents (31.7%), TV coverage (26.3%), magazines (23.4%), word of mouth (19.9%) and travel guide books (19.8%).

➤ *potential*: Internet and word of mouth are very important tools. Online information and blogs need to be developed.

The most popular activities during a stay in Japan were eating Japanese food (93.6%), shopping (72.8%), city excursions (64.8%), nature and landscape (55.3%), staying in a Ryokan-Japanese style inn (50.7%) and hot springs (39.7%). More than half of the answers (54.2 %) answered that they would very much like to enjoy health spas/ hot springs on their next visit to Japan.

The same answers (multiple answers possible) were observed among visitors to Hokkaido as well, however, the greatest answer was distributed quite equally between nature and

landscape (67.1%) and hot springs (60.6%), followed by shopping (49.6 %), city excursions (47.9%) and Hokkaido specialty/local cuisine (41.6 %).

➤ *potential*: The popular activities for the foreign visitors to Japan are also available in Hokkaido as well. Attractions and activities in Hokkaido shall attract foreign visitors and meet their expectations. Dynamic presentation of tourism activities in Hokkaido could be effective.

2.4 Comparison of Hokkaido Tourism Industry with Austria

Austria is ahead of other countries in tourism and hospitality management. Tourism, especially lead by the capital city Vienna, is one of the largest and fastest growing industries in Austria and is significant to Austrian economy. The Statistics Austria, an Austrian statistic research institution, reported that direct tourism value added in 2008 amounted to €15.05 billion which corresponds to 5.3% GDP share [18]. According to another economic survey, the value added generated by tourism in Vienna in 2009 amounted to some €3.6 billion, it represents approximately 5% of Vienna's Gross Regional Product and more than 15% of tourist value added for the whole of Austria [19]. Tourism is an important source of tax revenue for state and local governments.

Austrian National Tourist Office (ANTO), originally established 1945/46 to evaluate service quality of Austrian hotels and restaurants, was founded in 1955 to promote Austria as a sustainable travel destination abroad. ANTO is financially supported by the Austrian Federal Government by 75% and Austrian Chamber of Commerce by 25% (as of 2010) [20]. They are positioned as governmental DMO and a neutral organization in commercial business, although possibly acting as a fee-based marketing agent in respect to Austrian tourism interests.

ANTO forms a kind of a hierarchical network (Werthner & Klein, 1999, P48) in tourism industry, they named it "Alliance 10" consisting of nine other Austrian province tourist offices. It is a very practical formation that tourism resources and related raw materials from nine regions flow into ANTO, and products are shaped into the common Austrian brand label "Holidays in Austria" and distributed through several marketing channels, e.g. websites, internet, advertisements and brochures.

In the calendar year (CY) 2009, some 124.3 million bednights were reported in Austria, which made a drop of 1.9% compared to the previous year. The number of bednights by Austrian domestic tourists rose to 34.4 million by 1.7%, those by foreign visitors declined by 3.2% to 89.8 million. The total number of arrivals had a slight decrease by 0.9% to 32.3 million, while there was a decrease of 2.6% to 21.35 million among total foreign arrivals but arrivals by Austrians rose to 10.96 million by 2.6 (Source :TourMIS, see Appendix 2). Foreign visitors are significant source markets to Austria as comprising of a larger volume of arrivals and bednights.

Vienna in CY 2009, recorded approximately 4.4 million arrivals and some 9.8 million bednights of which 7.9 million was attributed to foreign visitors (80%). The main source markets to Vienna are Germany (21%), Italy (6%), USA (5%), UK (4%), Spain (3%), France and Switzerland (3%), which reached about 42% of the total share but Austrian domestic tourists rated even higher at 2nd rank in its share by 20% (Source: TourMIS, see Appendix 3).

With a comparison to Hokkaido, some findings are illustrated in the component of market share. As shown in Figure 5, the domestic market in Hokkaido is stronger by a huge margin than the foreign market, which is in complete reverse to Austria and Vienna. Although the domestic market is not monopolistic to Austria and Vienna, it maintains a higher favourable position in the share comparison as shown in Table 5. The market in Austria and Vienna is supported by a favourable source country with a certain degree of share in addition to the domestic market, i.e. Germany, whereas a similar loyal market besides the domestic in Hokkaido could not be found at all.

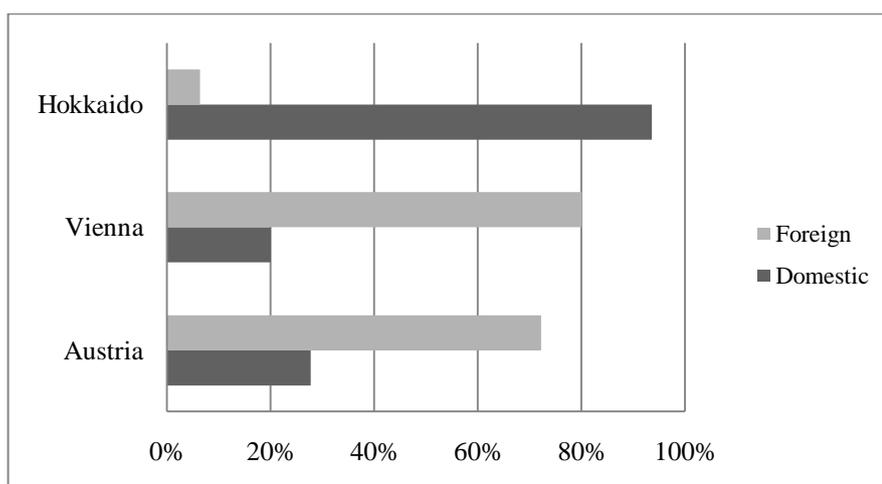


Figure 5: Market Share Comparison in Bednights 2009

Source: TourMIS and Bureau of Tourism, Department of Economic Affairs, Hokkaido Government, 2010

Table 5: Top Source Markets 2009 in Austria, Vienna and Hokkaido (Bednights)

Austria		Share %	Vienna		Share %	Hokkaido		Share %
Germany	48,856,862	39.3	Germany	2,076,866	21.1	<i>Japan</i>	28,940,000	93.6
<i>Austria</i>	34,400,000	27.7	<i>Austria</i>	1,970,301	20.0	Taiwan	564,102	1.8
Netherlands	9,451,747	7.6	Italy	560,469	5.7	HongKong	436,155	1.4
UK	3,263,866	2.6	USA	507,905	5.2	China	240,184	0.8
Switzerland	3,641,860	2.9	UK	358,630	3.6	Korea	230,804	0.7
Italy	3,015,873	2.4	Spain	308,079	3.1	Singapore	144,577	0.5
Belgium	2,530,232	2.0	France	284,871	2.9	Australia	130,052	0.4
Czech	1,955,027	1.6	Switzerland	284,148	2.9	USA	45,205	0.1

Source: TourMIS and Bureau of Tourism, Department of Economic Affairs, Hokkaido Government [14], 2010

These two illustrations reveal that Austria and Vienna attracted foreign tourists much more than Hokkaido. What attracts, inspires and motivates them to travel to Austria and Vienna? Can we presume it is due to relatively easy access within the European Union (EU) territory? Assuming it is, most of European metropolitans should be successful in tourism. It would be untrue in this case. Is it because of the organizational structure and its tourism marketing intelligence that Austria and Vienna have managed to pull so far ahead?

Let us compare seasonality of foreign visitors' bednights. The following Table 6 shows that Austria has two peak seasons in winter around February and in summer between July

and August as well as Hokkaido, while Vienna has welcomed foreign tourists mostly at the peak of summer season, however it seems that the foreign market to Vienna is regardless of the season. Table 6 shows that Hokkaido hold similar seasonality due to the similar tourism resources.

Table 6: Seasonality Comparison of Monthly Bednights 2009 by Foreign

2009	Hokkaido *	Vienna	Austria
January	229,931	449,979	11,475,124
February	343,797	389,723	12,862,618
March	132,171	546,492	8,500,931
April	83,790	690,614	5,410,477
May	97,168	782,637	3,675,776
June	83,334	709,333	5,661,040
July	189,324	865,221	10,324,189
August	193,470	957,935	11,921,100
September	98,388	829,790	6,475,088
October	144,290	775,827	3,749,042
November	110,700	534,647	1,803,164
December	273,068	762,849	8,005,615
Total	1,979,431	8,295,047	89,864,164

Source: TourMIS (as of 24 March, 2011), Bureau of Tourism, Department of Economic Affairs, Hokkaido Government, 2010 [13]. *FY2009

The budget for the Vienna Tourist Board (VTB) in 2009 was €23.7 million, of which 47% came from the local accommodation tax under the City Tourism Act, 22% from the Vienna City Government and the rest came from the Vienna Chamber of Commerce and sponsors [19]. VTB's budget and its employees are four times that of Hokkaido, which may reflect that the turnover that bednights by foreign visitors in Hokkaido is one fourth of those of Vienna.

Austria has ten times the scale in organizational structure, in budget and numbers of employees than Hokkaido. However, the difference in productivity is exceeded considerably more than ten times (see Table 7).

Table 7: Comparison of Organizational Structure (as of 2009)

	ANTO	VTB	HTO
Budget 2009	€52 mil	€23.7 mil	¥ 691,439,000 ≈ €5.7 mil
	75%: Austrian Government 25%: Austrian Chamber of Commerce	47%: Accommodation Tax 22%: City Government Others: Vienna Chamber of Commerce, Sponsors	75%: Hokkaido Government Others: Memberships, Sponsors
Employees	230	106	27
Arrivals by foreign	21,355,439	3,349,738	*675,350
Bednights by foreign	89,864,164	7,872,526	*1,979,431

Source: ANTO, VTB, Bureau of Tourism-Department of Economic Affairs, Hokkaido Government
* FY

How about the hardware in the Hokkaido tourism system? Is their infrastructure designed well to accommodate foreign tourists? Let us further examine their competence in the tourist infrastructure.

In Austria 67,166 accommodations are counted and they provided in total 1,087,370 beds in 2009. Thereof, 13,600 hotels (around 20%) have been categorized by star standard [21]. In Hokkaido, 4,952 establishments accommodate 327,471 beds [22].

Worldwide hotel chains hold star standard due to their global alliance, however, there is no specific classification standard such as a star standard for accommodations in Japan. Normally Japanese accommodations, especially in local cities, are classified by the facility category. In Hokkaido 668 hotels, 2,788 Ryokan-Japanese style inns and 1,496 lodging houses are registered [22].

Table 8: Accommodations Comparison 2009

	Austria	Hokkaido
Population (a)	8,281,295	5,600,000
No. of establishments	67,166	4,952
Category	5-4 star	Hotel
	2,400	668
	3 star	Ryokan
	5,500	2,788
	2-1star	Lodging
	5,700	1,496
Subtotal of Hotel category	(13,600)	(4,952)
Other establishments	53,566	-
Total supplied beds (b)	1,087,370	327,471
Total no. of bednights (c)	124,307,317	30,921,700
Ratio (c/b)	114.3	94.4
Travel intensity (c/a)	15.0	5.5

Source: Statistics Austria, Bureau of Tourism, Department of Economic Affairs, Hokkaido Government, 2010

The ratio is simply calculated to divide the total number of bednights by total supplied beds. Austria had 1.2 times that of Hokkaido. Travel intensity can be used to measure competitiveness in tourism, dividing total number of bednights by population. Austria is 3 times stronger than Hokkaido. Even though Hokkaido has the same land area as Austria, it would be preposterous for a region to be compared directly with a country. However, we use Austria for simple reference to measure infrastructure level of Hokkaido tourism. Compared to Tokyo, there are not so many worldwide chain hotels in Hokkaido. When looking for accommodation in Hokkaido, consumers cannot ensure the quality of service without some kind of standard, e.g. star standard, which offers less information from supply side.

The transportation system in Austria is highly developed and efficient for public convenience. The rail provider in Austria is Austrian Federal Railways (ÖBB), which has an extensive countrywide network. ÖBB operates a length of 6,600km and employs 42,893 people [23]. Most tourist places are easily reached by bus as well. ÖBB-Postbus operates around 22,000 routes [24] and is supplemented to reach local destinations which the train network fails to cover. In addition to their schedule service, excursions to scenic regions or sites are available. Travelling by train is generally fast and convenient but is

quite a bit more expensive than travelling by bus. Thus, the bus is a better option moneywise and for exploring the beautiful landscapes.

Most of Austrian's metropolises have integrated public transportation system with the national modes including trains, trams, buses and/or subways, offering several discount tickets to tourists and residents as well, some of which allow free transfers between all available modes on a given day or period within the specific zone.

Six province capital cities such as Vienna, Salzburg, Linz, Innsbruck, Graz and Klagenfurt have their own airports. Domestic flights are not so common means of transportation in Austria, but there are frequent connections between Vienna and other Austrian cities. Austrian Airlines serves all of these cities, and nowadays low cost carriers have entered the Austrian market too.

Compared to Austria, Hokkaido has a less organized traffic network. Metro lines are only available in the capital city Sapporo, and only operated by the Sapporo City Government. Railway is fairly developed and a popular mode of travel, but many cities are still accessible only by roads. Japan Railways Hokkaido Company (JR) is the only railway provider, serving approximately 2,500 km on fourteen routes across Hokkaido [25]. The train network is more than adequate for travel between major cities.

The two major bus companies undertake most of the bus network in Hokkaido. Hokkaido Chuo Bus operates a total of 278 routes [26] within the capital city Sapporo region and between Sapporo and other major cities by express service. JR Hokkaido Bus, a subsidiary of JR provides regional and long distance services, supplementing the railway network. Furthermore there are enormous numbers of bus operators in local regions. These services are not incorporated systematically. Although the bus is a cheaper but slower optional means, which covers the unexplored and inaccessible places by train, many local bus suppliers run independently in Hokkaido, which makes its usability somewhat of a problem for travellers.

Nine of the thirteen airports in Hokkaido have direct service to Tokyo and other major domestic metropolises. Due to the vast size of the land, Hokkaido has relatively well-developed commuter airline networks.

Table 9: Comparison of Transport Infrastructure between Austria and Hokkaido

	Austria	Hokkaido
Area	83,859km ²	78,000km ²
No. of Airports	6	13
Railway Provider	ÖBB	JR Hokkaido
Area of Service	6,600km	2,500km
Bus Providers	Postbus:	Chuo Bus, JR Bus, and many locals:
	countrywide operation	urban and local operators
Network System	integrated	not integrated

Source: ÖBB, ÖBB-Postbus, JR Hokkaido, Hokkaido Chuo Bus

Tourist demand does not flow into a single transportation mode. Increasing diversity of travel types and preferences by consumers calls for many available modes for selection and utilization in the destination. A transportation network is essential for both the local community as a quality of life and for tourists as a utility of service toward customer satisfaction in the place. Simply judging from the figures of operating lines against the land area, Austrian track covers 2.5 times more than Hokkaido. In Hokkaido, there are many traffic operators in each mode and each region, whose services are not integrated at all, as Austria does. Unfortunately, all official websites of bus operators in Hokkaido are available only in Japanese, while only JR offers information in English and other Asian languages. This could cause a bottleneck and confusion for potential tourists or stop them planning travel to Hokkaido at the early step of information searching. Transportation infrastructure should be improved in consideration with tourism development.

According to ANTO, 198 incoming agencies are registered in all provinces across Austria [27]. 259 travel agents are counted in Hokkaido [22], however the number of incoming agencies is unconfirmed by HTO and by the Japan National Tourist Organization (JNTO). JNTO is an independent administrative organization under the Japan Tourism Agency (JTA) to promote inbound travellers to Japan, engaged in a diverse range of inbound tourism promotions overseas, marketing and promotion of international conventions and support for foreign tourists through Tourist Information Centres. In their official website (<http://www.jnto.go.jp>), 26 incoming travel agencies (one has already discontinued) are listed just as JNTO's supporting members [28]. Let us look further into the overall Japanese inbound market.

In FY2009, JTA reported that the annual turnover by the leading 62 Japanese travel agencies reached 5,540 billion Yen, thereof 52 billion Yen of inbound business were accounted by 38 travel agencies [29]. Although SME incoming agencies are excluded from this report, these 38 travel agencies are quite similar to the JNTO’s supporting members. The difference in number between 26 and 38 is caused by the way the JTB group companies, one of the mega travel agents in Japan, are counted. In JNTO’s list, JTB is counted as one, while 14 JTB group companies run by a self-accounting system are listed independently in JTA’s turnover list. In any case, the number of incoming agencies in Japan is approximately 38, it is quite a bit smaller than that of Austria. Based on the annual turnover report as in Table 10, inbound business in Japan has reached only one percent of the whole. This result clearly indicates that smaller inbound business is related to a lower level of industrial infrastructure in Japan and Hokkaido.

Table 10: Turnover by Japanese Leading Travel Agencies and Size of Tourism

	FY 2009		FY 2008
Overseas travel turnover	1,954,169,770	35%	2,421,349,432
Inbound turnover	52,225,441	1%	62,057,630
Domestic travel turnover	3,533,888,285	64%	3,954,239,101
Total (unit in thousand Yen)	5,540,283,495	100%	6,437,646,163
No. of Travel Agencies	Approx. 38		Approx. 38
No. of Foreign Tourists in Japan	6,789,658	100%	8,350,853
No. of Foreign Tourists in Hokkaido	675,350	10%	689,150

Source: Japan Travel Agency, Ministry of Land, Infrastructure, Transport and Tourism, 2010

Before planning and implementing strategies or policies to become an international tourism nation, it has been suggested that Japan and its regional destinations need to invest and develop the industrial infrastructure for welcoming foreign tourists. With this finding in mind, let us review key factors contributing to successful tourism development, apply these to the Hokkaido tourism industry and examine what components are missing.

3. Key Factors for Successful Tourism

Tourism is a very complex industry. Therefore defining tourism is quite difficult. It is not an industry that is represented by a single product or service within the Standard Industrial Classification (SIC). Most definitions of tourism refer to the services and products such as hotels, restaurants or attractions provided to tourists, however these are not the only components of the tourism industry. Many other internal and external factors, many enterprises from small, medium, to mega scale, and many organizations are involved in getting tourism to function systematically. The more that these parties communicate with each other, the more sustainable an area would become. Tourism needs to be dealt with interrelationships among the market place.

3.1 Internal Factors

Tourism products are supplied in the market place and consumed there by visitors. There are two main drivers: demand and supply in the industry. Consumers are rich in information resources but they always look for the proper information on products or services, availability, price and how and where to buy it. The supply side shall identify customers' needs and its market segments, and create the respective products with the right features and prices (Werthner and Klein, 1999, P7) in balance with supply and demand. How much the destination is able to meet such demands is the true key for tourism business development. It should be noticed, however, that market trends and demands continue to change. The gaps in mismatching demands and supplies may cause an involuntary bottleneck unless any marketing activities were bridged.

3.1.1 Supply and Demand

Tourism products cannot be easily tested in advance like other commodities, and many internal and external factors interact in the market place. Therefore forecasting of travel demands and trends is difficult and complex. Before being counted in the market, firstly the consumers need to be motivated to travel with personal interests, finances, time and physical ability. Secondly, many external factors such as diversity of destinations, foreign exchange rates, recession, epidemics or natural disaster would influence a traveller's

motivation. To understand the current travel trends, time series studies in combination with multivariable approaches are conducted by tourism organizations.

The output shows the current trend of tourists in the market and the improvements which should be undertaken for further development. Understanding the consumer from the demand side leads to a knowledge of potential tourist groups for the destination. That outputs could be refined more by demographic attributes like age, occupation, education, income or family size, which helps defining potential market segments and examining how to tailor service products to the market audience.

Tourist places and event attractions based on natural and cultural resources are the greatest components in the supply side, which could be the true travel products for providing physical and mental experiences of travel to tourists. However, not every tourism resource would become tourist attractions in the destination immediately. It should be designed as a product for tourists and managed for operation to be ready for accepting tourists. Moreover, it may be combined with other amenities and services in order to increase the quality of service. So that products and services from resources can meet demands and stimulate consumers' interests in travel.

Hotels, restaurants, travel agencies, transportation and airlines provide specific service products. Such service businesses augment the industry and make an enormous impact on the economy in the destination. The business transactions are not only with tourists but also benefit the local market. As mentioned, tourism products consist of natural and cultural resources but both could be developed to complement one another and be presented together in a comprehensive product line with respect to the consumers' demands.

Transportation is an important vehicle for connecting services and attractions in the destination. When a visitor first arrives, being confronted with several modes of transportation from many different companies can be stressful and confusing.

An intermodal service, a free pass and signboards for easy access should be offered.

The "Vienna Card" offers great benefits for visitors to Vienna, which allows tourists unlimited free travel for 72 hours on the underground, buses and trams around Vienna region in payment for 18.50 Euros and gives additional discounts on many attraction sights, restaurants, cafés and shops.

Promotion is an effective marketing activity for achieving tourism success as well as marketing research, which is highly dependent on customer needs and setting potential customer targets through market research. This would be a platform where the audience can easily access and obtain valuable package of services or products (Kotler et al., 2003, P5). It is used to encourage potential customers to enter into the market place. Throughout the marketing promotion, attractions and activities from the local resources facilitate the creation of images and values of the destination and promises what visitors can experience in the place.

Promotion is directed toward the demand side before travel decisions are made whereas information is needed both before and during travel (Grunn, 2002, P56). Tourism is an information business due to structural reasons (Schertler, 1995; Werthner and Klein, 1999, P8). The motivated tourists look for information for decision making. However, information on the destination and service products from the supply side are mostly descriptions and abstract models. For assuring the quality of products, tourists have to overcome the risk distance between decision making and consumption by collecting as much useful information as possible. The most important point here is that both demand and supply sides need information. Information about service products will be delivered to consumers from the supply side, and information about customers' demands flows back to the supply side. The information each supplier provides adds values to the product, so that consumers would find it easier to make decisions and assure the value of the product with a certain expectation. The more frequently the communication network flows in the supply chain, the more suppliers can be engaged in the supply chain and meet market trends as Figure 6.

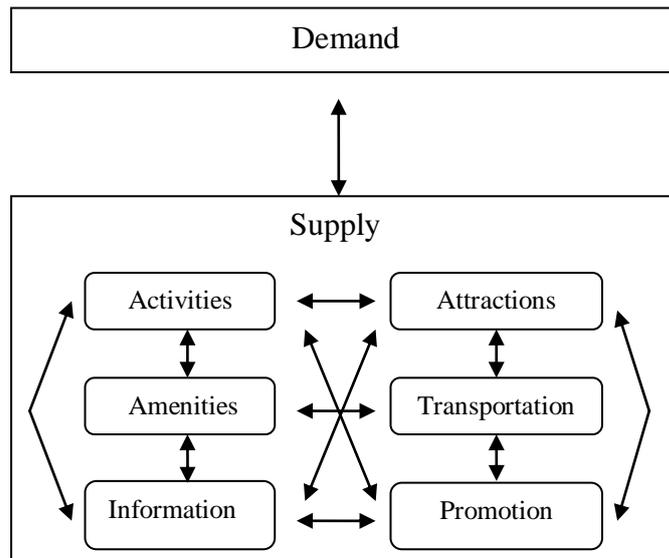


Figure 6: Tourism System (revised Grunn's figure, 2002)

Source: Grunn, C.A. and Var, T. Tourism Planning. P34.

Tourism organizations and DMOs have to deliver aggregated information with a favourable destination image to the market using internal and external frequent communication networks and channels. Due to the consumers' fast changing behaviours, distribution of information is time critical under global competition. The information on the destination should not be static, should be updated according to market demand and availability. A frequent flow of communication helps DMOs not only to get the market overview on travel trends of tourists, resource utilization and statistical data but also to improve the flow of communication with consumers.

Recently, the greatest change in consumer behaviour is how to search for information. The internet is mostly used for searching for information and product comparison, which avoids the risk of mismatching between quality of service and information. Traditional information will be replaced by electronic information. How much the destination employs the electronic information system could be a factor to measure of competence in the tourism. We will discuss this further later on this thesis.

3.2 External Factors

Natural and Cultural Resources:

The development of the supply side is influenced by several external factors.

Natural resources identify the unique attributes of the place, and these are very important objectives for tourists to visit. A popular destination is also abundant with cultural resources. Tourists have become more sophisticated through being more educated and having many experiences of overseas travels. So tourists have interests in the history and historical places of the destination. Sites of ancient history often have their own ethnic lifestyle and culture such as art, music, food, drinks and custom. These aspects would bring some authentic excitement of travel to experience a different time and place.

Natural and cultural resources are a foundation of tourism attractions and activities on the supply side. In any event, the greatest business success depends on resources and their preservation within the destination. Climate and weather play an important role in the popularity of a destination. As a recent trend, eco tourism, green tourism and UNESCO World Heritage sites are in demand as travel purposes because tourists are increasing awareness of preservation of the natural resources and climate changes.

Entrepreneurship and Finance:

For the development of tourism, financial support and entrepreneurs are required for both public and private sectors because many small and medium enterprises (SME) are involved in the supply chain. Adequate capital or funding, investment in infrastructure and a marketing budget supported by regional governments or official organizations are primarily needed for tourism development and sustainable tourism competence.

Labour:

Tourism generates employment, business opportunities and benefits for the local community. Tourism is a people related business i.e. the hospitality business, the human resources management is indispensable, which also contributes to maximizing profit. Service quality management is important for attaining a competitive advantage in the market. The higher the market demand level of service, the more trained labour is required.

Governmental Policy and Leadership:

Governmental policy and regulations influence the way a tourism system works and accounts for the quality of tourism development. For example, to keep up with mass mobility by coach in the destination, infrastructure needs to be managed and maintained by supportive governmental policy. Leadership is incumbent on official tourism organizations to carry out objectives more successfully in tourism development.

Others:

It should be noticed that some external factors such as the diversity of destinations, geographical and climate changes, foreign exchange rates and recessions, and epidemics could cause a decrease of demand.

3.3 Case Study of Market Researches by Vienna and Hokkaido

The Vienna Tourist Board (VTB) made a survey to analyse the market trend in 2009 [30]. Vienna has been establishing the strong brand image as an international leading tourism destination. Their attributes as a city of music, history and culture have been attracting people worldwide for a long time. However, VTB saw a need to clarify what was lacking in what they had to offer to those who chose not to travel to Vienna. They succeeded with the very interesting finding in the research that Vienna is considered to be a “once in a lifetime” destination by most of the sample overseas interviewees. Although it shows that Vienna is viewed positively in image, it has the negative result of putting people off travelling to Vienna until someday. This gap caused a challenge for Vienna to appeal to people more directly and to reposition Vienna from a timeless destination to a “now” destination. Right afterwards, VTB replaced their slogan “Vienna waits for you” with “Now or Never”.

Their research was conducted with a focus entirely on understanding the destination Vienna and identifying the most important elements of image attributes in Vienna through consumers’ perceptions. After the data collection, the best five attributes: 1) Imperial heritage, 2) Music and culture, 3) Enjoyment of food culture, 4) Superb city infrastructure and 5) City/Green space balance are listed in a framework, each is connected with Viennese representative products or services for ensuring their brand image. Addressing attributes of uniqueness and differentiation is important for

preserving the value. Oppositely, it is necessary to classify the tourist perception of a place. This marketing process of matching both sides represents a practical model that the tourism organization should be conscious of market trend and cooperation with suppliers for the supply side of development because they have the closest link to the consumer side non-commercially on behalf of all suppliers.

The Hokkaido Tourism Organization (HTO) conducted online marketing research from December 2008 to February 2009 on the domestic market in three metropolitan areas in Tokyo, Nagoya and Osaka [31]. It reported that the greatest motivation for planning travel in general was financial ability followed by interests in beautiful natural landscapes, food and health spas. 76.5% of the sample answered that the internet was the most useful tool for searching travel information. The attributes they believe Hokkaido has to offer are abundant natural resources, delicious food, hot springs, ski resorts and shopping. It seems there is no gap between the supply and demand sides so far. However, whopping 42.9% had no reason for not wishing to visit Hokkaido ever, followed by higher cost in travel (38.5%): especially for the youth and young family travellers with children, and cold weather (17.8%): especially for the elderly, and inconvenient transportation (17.1%). The customer satisfaction level in natural resources and food was very high, although still relatively low in expectation level, price level and transportation system. HTO concluded this research report as follows:

- Our big three attributes (nature, food, health spas) are firmly established in the market.
- New product development from resources is needed to further motivate consumers to travel to Hokkaido.
- To accomplish this, we should improve the quality of human resources and its establishment of networks.
- To increase tourism revenue from sales products and services, products in the low season need to be developed and targeted towards the independent traveller and the senior generation.

Even the HTO succeeded in understanding the market trend from this research as the VTB did, their review did not criticize the internal negative factors on the supply side. The research revealed that motivation, price and transportation are obstacles to the

demand side. In the tourism product development, at first, consumers defines quality by the quality level of expecting experience, then compares the cost against the quality level of the expectation. Service quality and the price are crucial in tourism management because these decide the tourists' satisfaction level in the destination.

Although Hokkaido supplies correct attributes to the market trend, authenticity or differentiation may not be perceived correctly by consumers. The people who answered "Nothing in particular not to visit to Hokkaido" might be satisfied with a similar destination as Hokkaido. Where the HTO failed to find a solution for bridging the gap between products and customer's perceptions, the VTB's survey succeeded. It is an indispensable step for the DMO to ensure the major attributes and to preserve the authentic values. These viewpoints would shed light on why Hokkaido's performance has unfavourable results recently.

3.4 SWOT Analysis of Hokkaido Tourism

Recalling the identified facts in industrial analysis, let us make a SWOT analysis to illustrate the internal performance and resources of the Hokkaido tourism as well as potentials against threats and opportunities.

Strengths:

- 1) Advantageous climate of four distinct seasons
- 2) The attributes such as superb nature and urban surroundings, historical places/buildings, beautiful meadow/landscapes, ski resorts, hot springs, and food meet tourist demand.
- 3) New Chitose International Airport and its frequent flights from Tokyo and other major domestic cities.
- 4) Higher international awareness as a leisure destination
- 5) Indigenous history and culture of the Ainu
- 6) UNESCO world heritage
- 7) Sapporo was a winter Olympic game host city

Weaknesses:

- 1) Infrastructure of transportation, accommodation, incoming agencies
- 2) Same day visitors account for 70%.
- 3) Source markets depend on domestic and Asian neighbouring countries
- 4) Few FIT
- 5) High cost in travel
- 6) Service quality

Opportunities:

- 1) Increasing foreign tourists to Japan
- 2) Nature and well-being oriented as a leisure purpose
- 3) Tourism Nation Promotion Basic Law and Visit Japan Campaign by Japanese Government
- 4) Inauguration of high speed railway “Shinkansen”, direct access to Japanese mainland (projected to be running in 2015)
- 5) Internationalization of Tokyo Haneda Airport from October 2010
- 6) High internet usability and social media for travel information searches

Threats:

- 1) Global competition in tourism (domestic and international)
- 2) Decreasing overnight visitors in Hokkaido
- 3) Currency exchange rates, global recession, epidemic, and natural disaster
- 4) Declining population and number of children, and higher aging ratio
- 5) Shrinking of key local industry
- 6) Consumers trust given information through C2C more than the industry’s

The evaluation process using strengths or weaknesses to take advantage of opportunities or to avoid threats indicates changes in the marketing directions and potentials for developing plans and improving performance.

Where is Hokkaido now?

Strength no. 2) x Opportunity no. 3) x Threat no.4) and 5):

To avoid demographic threats in Hokkaido and to find a way to sustain global competition, tourism could be a dynamic leading industry. Hokkaido’s attributes meet expectations by

foreign visitors to Japan. The tourism nation promotion basic law would support the creation of a local revitalization platform on which local tourism resources cluster.

Where does Hokkaido want to go?

Weakness no. 4) x Opportunity no. 1) x Threat no. 2):

To achieve the tourism objective, developing the foreign market, especially FIT, is essential, which would avoid threat no. 2, the decreasing of overnight visitors to Hokkaido.

How does Hokkaido get there?

I. Opportunity no. 1) x Weakness no. 1), 5) and 6):

To welcome more foreign tourists, infrastructure in transportation, accommodation and incoming agencies, the price, and service quality should be leveraged with the national governmental policy.

II. Strength no. 3) x Weakness no. 3) and 4) x Opportunity no. 5) x Threat no. 2):

FIT is a new target segment. Taking advantage of convenient access from Tokyo and other domestic cities to Hokkaido, FIT from Europe, Northern America and Australia who prefer to stay longer in a destination are eligible for a new market segment.

III. Strength no. 2) x Opportunity no. 2) and 6) x Threat no. 6):

Information should be accurate, timely and unbiased. The quality and quantity of information on official websites should be improved. With the FIT segment, nature and well-being oriented travellers in mind, some model plans, ideas for longer stay, and building communication, e.g. blogs should be provided across the official destination website.

4. Performance Level of e-tourism

4.1 The Role of Information and the Internet in Tourism

From the above stated comparisons, it is predicted that poor marketing management on the consumer side would create another bottleneck to Hokkaido. Austria and Vienna seem to be conscious of consumer trends and attentive to improving customer relationships. This is the significant capability to have in order to foster their competence as a global market player. Online communication has to flow frequently between the supply and demand sides, within each side, and across the market place.

It is no exaggeration to say that tourism is impossible without the internet.

An online survey of 1,506 German internet users conducted by Yahoo in 2010 reported that 78% of survey participants answered that they purchased their last journey online [32]. Over 90% of respondents went to the internet first to search for travel related information. Search engines were used as the first source (75%), while traditional mediums such as catalogues, brochures (62%) and travel agents (55%) were supplements. The increasing capability of computers, increasing number of computer users and their degree of e-travel experiences could be considered to be pulling factors in this event. The internet accelerates the interaction between suppliers and consumers. In order to formulate timely response to consumers' demands, the tourism business has to go electronic.

A lot of enterprises can find business opportunities to reach a potential market with the introduction of the internet. The internet as be used not only as a marketing channel, but also a means of communication between suppliers and customers. Maintaining an effective website has become a key element in strengthening customer relationships and gaining a global or segmented market. Philip Kotler quoted from Henry Hartveldt of Forrester Research (2003, P499) three important advantages why consumers go to e-business.

- Increasing efficiency: possible to use at anytime and anywhere
- Varied information: possible to obtain information about travel and its destination
- Reducing cost: possible to compare prices and get lower price

Therefore, for the product suppliers the website has become one of the most important and convenient means of marketing to introduce the content, uniqueness, and differentiation of the product. Nowadays, the main reasoning behind an enterprises use of a website is focused on increasing awareness of the products, selling the products, supporting promotional campaigns of a brand or products, maintaining the communication channel with consumers, and collecting customer feedback and profiles. Though any enterprise pushes the product to the market all over the world on the internet, a comprehensive management technique is required to be successful in e-business.

Nevertheless, not all consumers benefit from e-business. Werthner and Klein (1999, P22) showed the relationship between knowledge of the consumer and complexity of the product as the Figure 7.

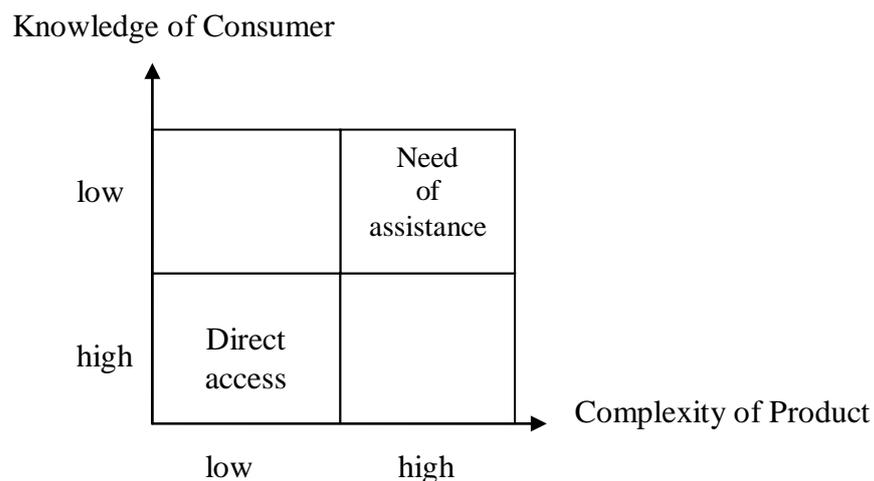


Figure 7: Knowledge of Consumer vs. Complexity of the Product

Source: Werthner, H. and Klein, S. Information Technology and Tourism. P22.

Lower product complexity but higher consumer's knowledge is well-suited to online services because simple and general products give consumers direct and easy online access for purchase. Online flight reservations by business travellers perfectly illustrate this. In the opposite case where the product has higher complexity and the consumer's knowledge is low, consumer needs assistant information in addition to general information. This is the typical case of tourism. Tourists have an interest in travelling or in a destination and can find a lot of information but find making a decision difficult

because tourism products and services are so diverse and complex, and not as simple as a commodity. Collected online information is aligned with traditional mediums to compare products and prices, to ensure the product quality and to avoid the risk of mismatching in quality and price.

4.1.1 Social Media in Tourism

Meanwhile social media are going to be a more relevant information source for travellers. Interconnectivity with friends, families or people who have common interests plays an online “word to mouth” role. So far today, travellers have used the internet to plan a trip, to get to know the destination, and to read recommendations by experts from the destination. Presently, travellers are well-educated, experienced, active in searching and collecting information, and are convinced of what they want to do during their journey. Such independent travellers are not satisfied with passive supplier-driven travel information in any medium. As a consequence, consumers are tending to be suspicious of such prettified information and have started using other tools to search for demand-driven information. Social media networks invite such consumers to share their opinions and encourage them to find the real story closer to the truth. In the present social media networks, any consumer could be an information source and an editor of the community site, and feel free to talk about what they are going to do, free to hear from others who have done the same thing, and free to share advice or opinions. Such information on social media is rather excluded from traditional destination websites or travel agents, however it constitute a substantial part of information search results. Consumers can let the organizer know their opinions on the organizer owned website, at the same time they can inform fellows opinions or feedback over the products. Such transactions of C2B and C2C interconnect in the information system, and C2C discussion forums about travel or destinations, such as Facebook, Twitter, Wiki travel, Trip advisor, and blogs have been attached to the websites of travel suppliers recently. Social media has changed the tourism landscape in searching for information as shown in Table 11.

Table 11: Comparison of Interaction Presence between Traditional Website and Social Media

Traditional Website	Social Media
Visit the official destination website ›Passive, time lag information ›Supplier-driven ›Objective ›One to one ›No share of information with others ›Plan a trip ›Book a hotel ›Find events ›Get to know the destination ›One way or bilateral communication line ›No one can publish information to others ›News about the destination ›Look at promotional photos and images ›Watch promotion videos	Visit social media sites about the trip ›Active, timely information ›Demand-driven ›Personal ›One to mass in a community ›Share of information with others ›Plan a trip ›Book a hotel ›Find events ›Get to know the reputation, feedback of the destination ›Multiple communication lines ›Anyone can publish information to others ›News from the destination ›Look at lively photos ›Watch diverse videos

“Wiki travel” (<http://wikitravel.org>) is a user-oriented travel guide to worldwide destinations and very popular for primary travel planning. It covers things to do, to see and to buy, events, hotels, food and safety information as well. Consumers use it with Wikipedia to get general information on a destination.

“Gadling” (<http://www.gadling.com>) is a part of AOL (former American Online), a weblog about global travel destinations and entertainment, which is becoming more popular in the US and worldwide as a social network. This covers interesting articles from general travel information to travel tips and technique, from budget to adventure travel.

“Concierge” (<http://www.concierge.com>) is a unique social media. It was established by the international travel magazine publisher “Condé Nast Traveller” based in UK, whose motto is “Truth in Travel”. Its digital magazine can be found on the Concierge website. Every year the magazine rates destinations and tourism facilities such as hotels and airlines. The editors of this magazine do not accept complimentary travel generally, so that they are independent and fair in ratings. They have good and bad experiences just like other travellers, and their reports and recommendations are transparent and authoritative to interested consumers. Both sides can communicate actively with a common interest, and consumers can get reliable truth in travel from fellow-travellers.

“Lonely Planet” which is based in Australia, is the largest international travel guidebook and media publisher. As of 2010, they published 500 guidebooks in 8 languages as well as TV programs, magazines and websites [33]. They have launched a travel community “Thorn tree” at <http://thorntree.lonelyplanet.com> on their own website. It is a web based travel forum where participants can feel free to post opinions and trade tips or experiences. Characteristic of this social media is that to ensure the reliability of exchanging information through the community, Lonely Planet has provided community ethical guidelines where they encourage users to contribute actively but to be civilized in a sincere and legal manner to fellow-travellers.

The online travel market has expanded. Yahoo’s 2010 survey in Germany also reported that 70% of the respondents answered that accurate content is important, and social media sites are the top relevant information source for online booking [32]. This result is also related to the fact previously discussed in the early chapter (3.1.1 Supply and Demand). For foreign visitors to Japan, the internet, personal blogs and word of mouth were the greatest mediums for attaining helpful information prior to coming to Japan. Personal blogs were not observed among foreign visitors to Hokkaido. It is relevant that most of the foreign visitors who came to Hokkaido travelled there as part of a package tour, not FIT. Assistant information is not so necessary for group travellers because their travel agents can play the role of social media as their information source. Although it is understandable the personal blogs were not listed in Hokkaido’s survey, it is quite easy to infer that information on Hokkaido may not be frequently talked about in social media. We examine this topic further in later chapter.

Personal blogs are one of the helpful information sources not only to foreign visitors to Japan but also to worldwide travellers. Now an interest arises in how many personal blogs about Japan are tourism related. Japan Blog List is available online at <http://www.japanbloglist.com>, offering 253 blogs (of which 21 are no longer updated), which is a helpful list for interested persons in all things on Japan. These blogs are all written in English or other foreign languages (see Table 12).

Table 12: Number of Blogs in the Japan Blog List

Blog themes	Number of blogs	%	Foreigners living in Japan	Japanese living in Japan	Japanese living outside Japan	Japan related	Other languages	Foreigners living outside Japan
Personal journal	146	63%	122	4				20
Lifestyle, Culture, People, Travel	29	13%		1	2	24	2	
Entertainment	14	6%				14		
Social, Economy, Politics	12	5%		1		11		
Education, Language	11	5%			1	10		
Internet, Computer, IT	6	3%		1		5		
Art	4	2%		1		3		
Food	3	1%		1		2		
Shopping	3	1%		1		2		
Fashion	2	1%				2		
Health	1	0%				1		
Sports	1	0%				1		
Total	232	100%	122	10	3	75	2	20

Source: Japan Blog List (as of 03 January 2011)

The most popular theme of a blog is a personal journal style mostly written by foreigners living in Japan, these bloggers are talking about what they are going to do or have experienced in Japan. This is the most live and local news from the place where the bloggers live. The second popular blog theme is related to the Japanese lifestyle, culture, people and travel to Japan or a certain destination. These top two themes are relatively similar to leisure purposes and inspire holidays to the place. This simple research showed that personal blogs make many themes, travel in particular, interesting in such a way as to motivate the audience to travel.

Indeed, social media continues to be embedded in tourism. Many businesses in tourism see social media as a new communication tool with the consumer market and start employing Facebook, Twitter or Trip advisor on their own website. This application has both of advantages and disadvantages for the business. In a short term it might be a buzz, however, in a long term it would be a great chance to increase the good reputation and loyalty among customers. A customer who had a favourable experience from the service

product tells the good news to others; it works as an online word of mouth. Contrarily, even one or more negative online feedback would disturb business. However, this could be seen as both a challenge and an opportunity for the company; challenge to fix the problem, an opportunity to improve service and potentially gain more customers as a result. Social media applications on their own website should not just follow the fashion of the IT trend but they should also demonstrate to consumers that the company is serious about the service quality management. What we need to emphasize here is that the social media has become an important medium for both travellers and suppliers. How accurately recommendations from online information from the suppliers matches their reputation from the social community is another critical issue for the tourism industry.

To minimize the gap in quality and to shorten distance from the consumer side, ANTO has set up a blog platform at <http://treasure.austria.info> as an attachment under their official website. Staff members of ANTO write journals through their recent travel experiences in Austria. It invites a communication platform to share local information with potential visitors and also with bloggers, in which visitors can find hidden travel tips and can be inspired by their travel to Austria. ANTO stays closer to the demand side and enjoys its community. Such comprehensive information makes it easier for consumers to ensure that their expectations about quality and service of a product in Austria are met.

Most companies have set up their own website presenting themselves. WWW is a really global but very competitive medium. A voluntary approach with the consumer side dealing with social media would help to shorten the physical distance between suppliers and consumers. Not being conscious of consumers' expectations in their own website may lead to immediate failure of competence in business. It is highly recommended that Hokkaido takes this topic into serious consideration, especially if it wishes to identify the target market, i.e. foreign FIT and attract more of them in the near future. Assuming that frequent communications via travel blogs or social travel sites must be one of the criteria for measuring competitive marketing, where do Austria, Vienna and Hokkaido stand?

4.1.2 WWW Presence in Tourism

To evaluate a destinations competence, let us examine the website presence with some empirical research with a comparison between Hokkaido/Otaru and Austria/Vienna.

Phase I: Keywords Search by Google

Google is estimated to have indexed eight billion pages (Sullivan, 2004; Wöber, 2010) and is used by 67.5% of worldwide searches [34]. Research customers who have not yet decided on a travel destination may have no particular keyword in mind and are likely to use a set of keywords such as “tourism”, “tourist”, “travel” or “trip” combined with the name of a destination or country at the primary research stage. Google search is a helpful instrument for observing how many information resource sites are available.

In order to observe the number of available resource websites, we use the Google search engine as demonstrated in Figure 8 and 9. It is expected that the results of the first empirical research in ten different languages, using paired keywords, measure the attractiveness of a destination in the market.

Using keywords:

- Austria tourism or tourist or travel or trip
- Vienna tourism or tourist or travel or trip
- Hokkaido tourism or tourist or travel or trip
- Otaru tourism or tourist or travel or trip

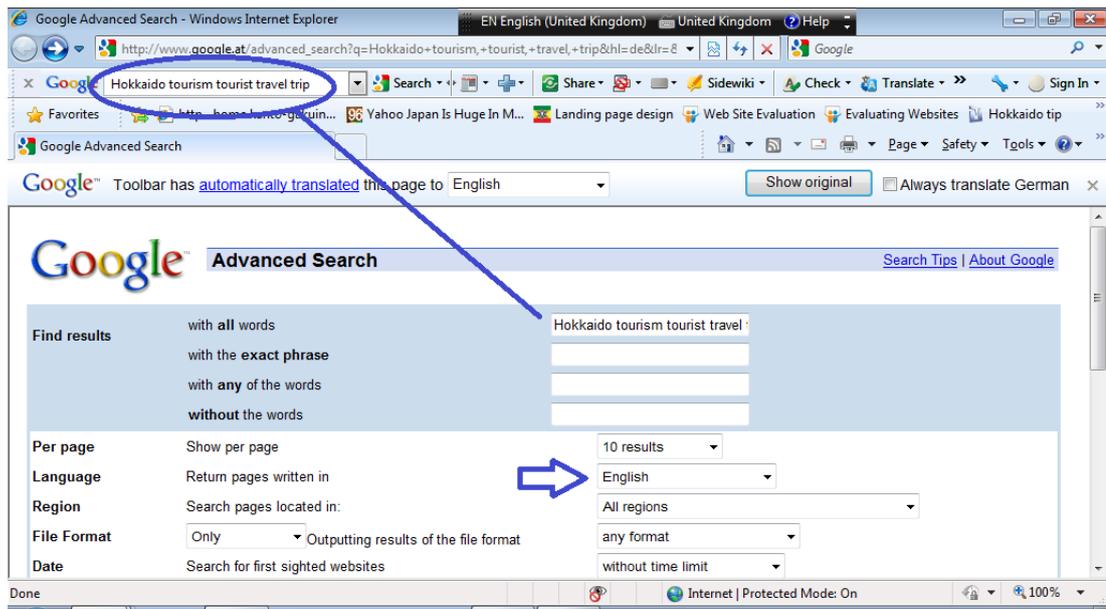


Figure 8: Screen Shot of Google Search Setting

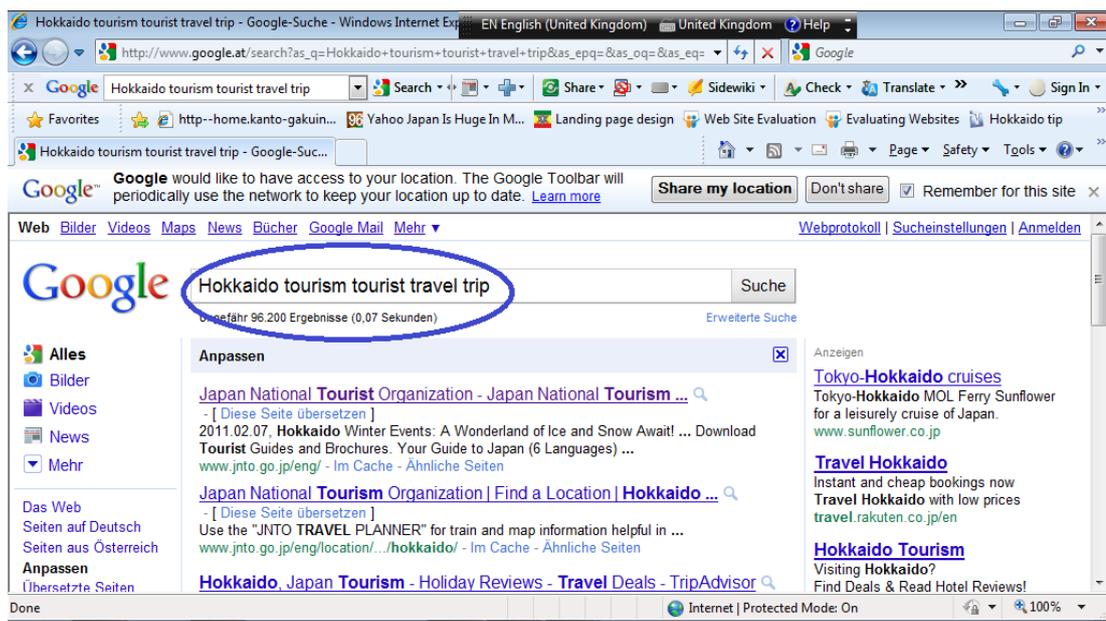


Figure 9: Screen Shot of Google Search Results

As shown in Table 13, the number of URLs of Otaru is far greater than that of Hokkaido in Germany and Spanish. The reason for this phenomenon is unknown. The contrast ratio is to see the proportion of the local regional volume against the greater region, which we calculate by dividing the number of Vienna's URLs by Austria or Otaru by Hokkaido. Excluding Otaru's exceptional results in German and Spanish, approximately 50 percent of the greater region's volume corresponds to that of the local region in both cases.

A lot of tourism information about Austria, and Vienna as well, could be retrieved in English. Most used English, not their mother tongue German (see Figure 10). The rest was well distributed among the other languages. Information on Vienna is equally available in multiple languages which represents their in-scope markets, so that these are quite similar to their main and emerging source markets. It could be interpreted that Austria and Vienna are communicating globally as an international tourism destination.

Table 13: URL Results using Paired Keywords in Each Native Language by Google Search (as of 21 February, 2011)

	Austria	Vienna	Contrast	Hokkaido	Otaru	Contrast
English	5,410,000	1,220,000	0.23	96,200	126,000	1.31
German	97,900	93,100	0.95	800	30,800	38.50
French	287,000	196,000	0.68	3,880	331	0.09
Italian	150,000	72,300	0.48	3,250	5,460	1.68
Spanish	800,000	230,000	0.29	11,600	66,700	5.75
Dutch	32,600	9,260	0.28	154	47	0.31
Russian	362,000	107,000	0.30	14,300	1,840	0.13
Japanese	275,000	264,000	0.96	753,000	331,000	0.44
Chinese	114,000	28,600	0.25	91,900	27,000	0.29
Korean	619,000	199,000	0.32	161,000	119,000	0.74
Average			0.47			*0.62

*excluding results in German and Spanish

Tourism information on Hokkaido and Otaru are enormously available in Japanese. The proportion of the result corresponds to the fact that Hokkaido and Otaru are dominated by the domestic market. Japanese consumers are very rich in online travel information. In other words, DMOs like the HTO have a lot of competition in supplying tourism information to the consumer side. In comparison to Austria/Vienna, the volume of information in English is extremely small. Furthermore, the number of Chinese sites, which should be essential to Hokkaido's main foreign source markets such as Taiwan, Hong Kong, and China, is also smaller. This empirical result shows that the number of URLs can be used as a barometer of global reach, i.e. how attractive the destination is to the global market. Increasing the presence of diverse sites in the target markets, definitely in English and/or Chinese, will be a critical issue for Hokkaido tourism strategy.

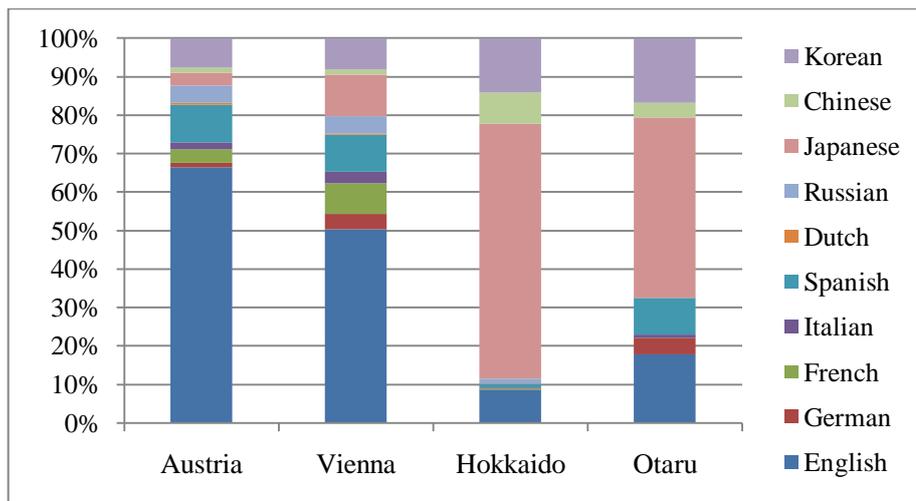


Figure 10: Language Presence of Online Tourism Information by Destination by Google Search (as of 21 Feb, 2011)

Phase II: Destination Search in Social Travel Media

It comes as no surprise that Hokkaido and Otaru have not yet reached the social communication platform. To confirm this and retrieve more relevant results, the second experiment is built on the first empirical phase. The same keyword analysis was conducted within popular travel blogs sites and social travel guides as listed in Table 14.

Table 14: List of Social Media

Blog Name	Website
Concierge	www.concierge.com
Gadling	www.gadling.com
Lonely Planet	thorntree.lonelyplanet.com
Travel Blog	www.travelblog.org
I go U go	www.igougo.com
Real Travel	www.realtravel.com
43 Places	www.43places.com
Trip advisor	www.tripadvisor.com
Virtual Tourist	www.virtualltourist.com
Trav Buddy	www.travbuddy.com
Travel Journals	www.traveljournals.net
Travel Pod	www.travelpod.com
My trip journal	www.mytripjournal.com
Travel Blogs	www.travelblogs.com

As perceived from the blog names, they are all online portals for travel, the range of the information to be retrieved need not to be limited. In contrast to the phase I Google search, paired keywords limit the extracted results and report "no matching results". Therefore, just the name of the destination was used as a search keyword (see Figure 11 and 12). Furthermore as Wiki Travel is basically a single page description, it was excluded from these research samples.

Using keyword:

- Austria
- Vienna
- Hokkaido
- Otaru

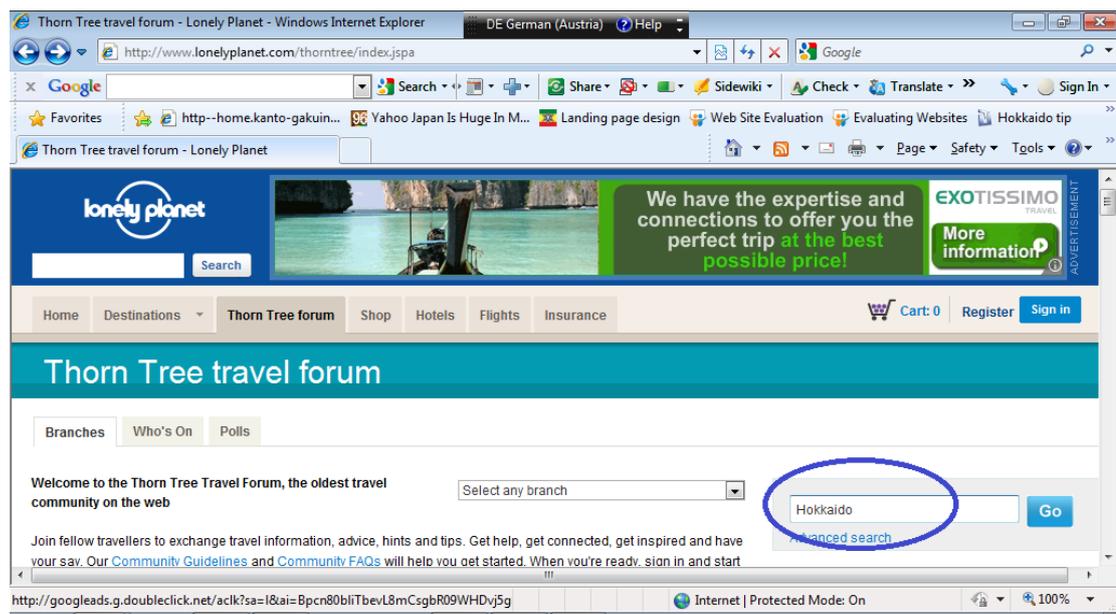


Figure 11: Screen Shot of Destination Search in Social Media, Lonely Planet

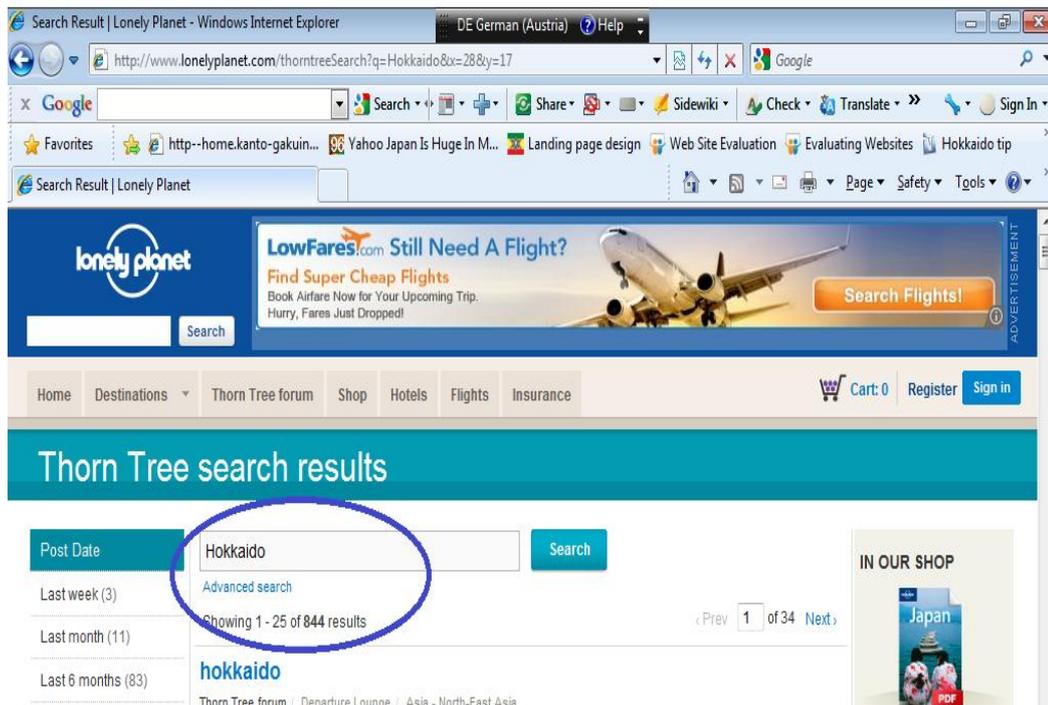


Figure 12: Screen Shot of Destination Search Results in Social Media, Lonely Planet

The overall result (Figure 13) shows that Austria and Vienna are current topics in social travel communities, but not Hokkaido nor Otaru. In some blogs attaching the functionality of online hotel booking such as Trip advisor, I go U go and Real Travel, a small number of retrievals about Hokkaido and Otaru was extracted, however it reveals that Hokkaido/Otaru is a very small subject in the social forum, which corresponds with the fact that only a few foreign tourists have experienced Hokkaido. Thus, not many opinions or recommendations have been posted on the forums. This results in potential travellers not being able to make use of assistant tool to confirm the quality of Hokkaido, and the opinions and reputation of the service products. Consequently, Hokkaido has been excluded from the list of the travel destinations in searching step by consumers.

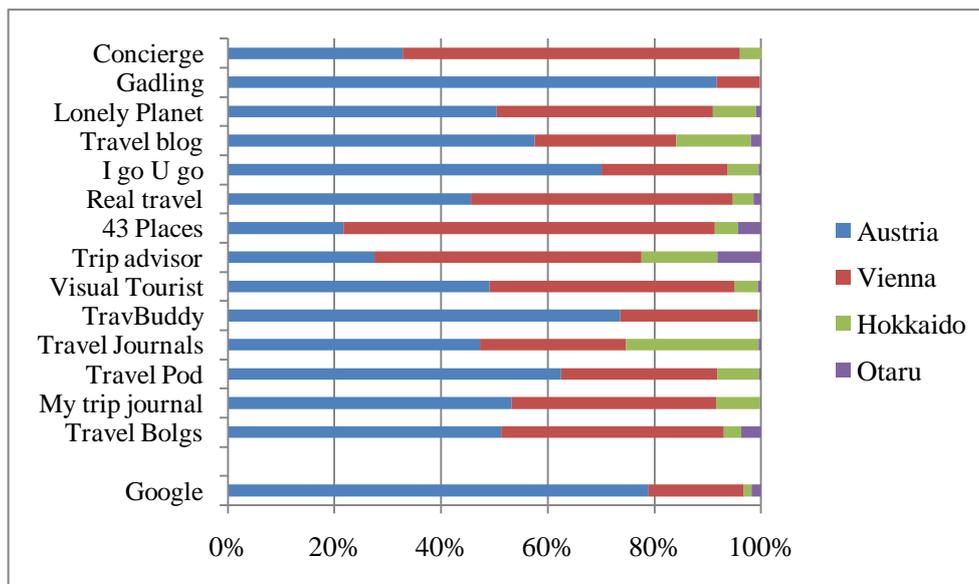


Figure 13: Destinations Search in Social Travel Media (as of 21 February, 2011)

Phase III: Language Presence Research in Tourism Suppliers

In an earlier chapter, in Table 2 we expected that the popular Hokkaido cities often did not receive the benefit of bednight turnover with regards to the availability of accommodation facilities or other unknown factors. We take a closer look at the use of websites in tourism business practices, especially at incoming agencies and hotels.

Incoming Agency:

The VTB has published a list of incoming agencies on the website and brochure.

There are 71 agencies listed [35], of which one website was under construction (as of 21 February 2011). 86% of the agencies have their own website, 80% of which, in addition to German, provide the user with the option of changing the language mainly to English, but other languages are also an option.

With regard to Hokkaido, the number of incoming agencies is officially unknown.

Therefore, we examine the 62 leading travel agencies in Japan according to the JTA's list [29]. In this case, it should be noted that 24 non-inbound handling agencies are included.

Without exception, all 62 agencies maintain a website, but surprisingly their adoption rate of English and/or other languages on the website was relatively low at only 27%.

Nevertheless, within 38 inbound handling travel agencies, 42% have an English site.

This would provide evidence that the Japanese inbound side has not yet built the business platform sufficiently for communicating with the overseas market.

Table 15: Website Presence in Incoming Agencies in Vienna and Japan
(as of 21 February 2011)

Vienna	Incoming Agency					
	No www.	10	14%			
	www.	60	86%	English/Multi	48	80%
				German only	12	20%
	70	100%		60	100%	

Japan	Leading Travel Agencies		Incoming Agency		Non Incoming Agency		
	English	17	27%	16	42%	1	4%
	Japanese only	45	13%	22	58%	23	96%
		62	100%	38	100%	24	100%

Accommodations:

The official website of the VTB has the option to search for and book online accommodation. In their printed hotel catalogue (Vienna Destination Guide 2009), there are 377 accommodations listed with a star classification.

Table 16: Accommodations in Vienna

Classification	5*****	4****	3***	2**	1*	Non- category	Total
No. of accommodations	8	145	136	43	18	27	377

Source: Vienna Destination Guide, Vienna Tourist Board, 2009.

As the non-category group has almost the same qualification as deluxe five+ stars, only five to four stars and non-category groups, which totals 180, were selected for this experiment. The 26 four star establishments, which were not available for online booking on the VTB official website, were excluded. 143 out of 154 (=180-26) total sample hotels have websites in the mother tongue German, English and/or multi languages, an excellent 93%.

In the same manner, accommodation in the top two popular cities, the capital city Sapporo and Otaru, listed on the HTO's official English site are verified [36].

In Sapporo, there is a total of 91 accommodations listed, 74 hotels, 15 Japanese style inns (3 inns with private open air hot springs, 12 inns with hot springs) and 2 youth hostels. Thereof 57 accommodations have websites in Japanese and English and/or other languages. Indeed there is not much accommodation in Otaru, 11 are listed in HTO's website, thereof 8 have English language sites. However, 23 accommodations are listed in the Otaru city guide map which was distributed at the Otaru City Tourist Information Centre (the publisher is not described clearly). For a clearer view of the industry's presence, these 23 establishments were examined.

Table 17: Website Presence in Accommodations in Vienna and Hokkaido
(as of 21 February 2011)

Vienna	English/Multi	German only	No www.	Incorrect	Total
5 - 4 stars & Non-category	143	6	1	4*	154
	93%	4%	1%	3%	100%

Hokkaido	English/Multi	Japanese only	No www./Incorrect	Total
<i>Sapporo</i>				
Hotel	48	14	12	74
Japanese Inn	7	6	2	15
Pension YH	2	0	0	2
Total	57	20	14*	91
	63%	22%	15%	100%
<i>Otaru</i>				
Hotel	9	2	0	11
Japanese Inn	3	1	1	5
Pension YH	2	2	3	7
Total	14	5	4	23
	61%	22%	17%	100%

* unavailable website, no website description or incorrect link on the HTO website

The Viennese higher ratio of multilingual usage on websites proves that Vienna has marked international competence in communication in the global market, whereas the capital city of the Hokkaido province, Sapporo has a much lower ratio. Otaru and

Sapporo had very similar to ratings. Approximately only 60 % of hotel accommodations (14 out of 23) have websites in English and/ or Chinese, Korean, or Russian in addition to Japanese which are relevant to the main overseas source markets to Hokkaido tourism. Sapporo and Otaru need to consider improving the quality of their website services to attract more overseas market.

Noticeably, the loading time of the homepage of each hotel website in Sapporo is considerably longer due to the overly numerous number of colourful photos and images which take a long time to upload. Furthermore, during this research on the HTO's website, it was frequently noted that many accommodations had no website listed for further information or that the links provided were often incorrect. The inaccuracy of the HTO's website is inferable from these phenomena. Just having a website is not sufficient if it is full of inaccuracies. Even if the website was found, but only available in Japanese, there were no online booking functions. In such situations, the website visitors become disappointed and give up staying at the website. This extends to problem issues of reliability, user friendliness and technical features on the website. It must be discussed later at the website evaluation.

From the point of view of the infrastructure scale, there is a big difference in the number of accommodations between Otaru and Sapporo. Since they are both geographically located close in the central region, Sapporo is supposed to be a lodging base for excursion travel around the central region. That is, Otaru might be a complement to Sapporo and have its bednights threatened by Sapporo.

The series of research revealed that Hokkaido has not currently reached the global market in the information system and social community forums. More than 30% differences were measured between Austria/Vienna and Hokkaido/Japan in tourism infrastructure and in English language employment on the websites. Overall, it has confirmed Hokkaido's lower level of international competence in the global market.

4.2 Evaluation of Destination Websites

It is advocated that the website has become an important marketing tool in the tourism industry, however not all websites have been successful in e-marketing. A website lack of easy use, usability and visible listing will result in failure. Websites with a usability problem would cause users to feel pressured and therefore give up before they had finished their research. Websites which are unable to give a clear profile of the destination, look disordered, are not easily found in the search engines or if found have a usability problem result in disappointment for the user. As a consequence, the company cannot deliver enough information online to the demand side, which causes a low number of hits or page viewings and shorter log-in time, a decrease in sales turnover, and negative influence on the brand building as well. Thus, the potential for improving a website is necessary. To succeed in e-marketing, the company has to design the website on the basis of marketing strategy and its goal. The successful websites have a clear value proportion (Werthner and Klein, 1999, P283). They should be designed not only with an attractive appearance but also with an effective e-platform and taking care with regard to user friendliness and utility. An analysis of the website and benchmarking would confirm the usefulness of assessing the company or organization and suggest a modified strategy for further improvement.

4.2.1 Methodological Approaches to Website Evaluation

Many academic researchers have noted the importance of website evaluation. M. Lu and W. L. Yeung (1998) proposed a framework for evaluating website performance, in which the usefulness of a website is estimated based on its functionality and usability (Law et al, 2010, P297). The ISO 9241-11 is an international standard to measure usability and provides the definition of usability that is used in subsequent related ergonomic standards. Usability is the extent to which a product can be used by specified users to achieve specified goals with effectiveness, efficiency and satisfaction in a specified context of use [37]. Taking this standard into consideration, the usability evaluations in tourism need to measure how deep a website meets the three requirements.

- Effectiveness: How useful information is offered?
- Efficiency: How speedy and accurate the interface completed a task?
- Satisfaction: How much satisfied with the acquired information?

The quality of the usability could be guaranteed only after all three requirements reach a certain high level together. The degree of satisfaction, however, will be decided by a personal sense of values and personal perceptions, i.e. psychological and physical reactions in experiencing interface utility. Therefore, academic researchers should be careful in particular whether the findings of quantitative research from a limited number of sample participants would be applicable in evaluation or not.

Generally, website evaluation has two approaches: qualitative and quantitative.

Quantitative study normally deals with data in the form of numbers to achieve the overall quality of a website, while qualitative study involves analysis of data to understand the meaning of numbers.

Qualitative Approach:

Qualitative research processes inductive analysis of data in the form of words. Specialists and academic researchers develop their own evaluation guideline or instrument such as deep interviews for smaller focused group, apply the theory and their knowledge in the survey to gather deeper understanding of the patterns, and lastly make interpretation of fact and suggestions for further improvement. In a survey to measure consumer satisfaction, academic researchers collect data of perceptions from consumers and provide the results and suggestions for quality improvement to the website authors.

Qualitative evaluation is subjective, therefore it is helpful in investigating the problems comprehensively but researchers require a broad technical knowledge in the industry and research study. Moreover, to ensure the validity and reliability of the used instrument, this approach requires the assistance of quantitative research at the same time.

Quantitative Approach:

Quantitative research involves analysis of numerical data in the form of numbers or statistical ratio. Researchers know in advance what they want to know, and prepare tools carefully such as questionnaire or equipment to collect numerical data for the research.

Analysis has to be objective in attempt to explain what is observed in the data. It is efficient approach to test hypothesis.

R. Law, S. Qi and D. Buhalis (2010) reviewed the recent developments of methodological approaches in the studies of website evaluation. It reported that a website was evaluated with adopted or modified models or instruments. The five methodological approaches are;

- Counting Methods (C): for evaluation of website performance and its content richness. Adopted or modified checklist is used to identify the existence of website features. Consumers, suppliers, experts, and researchers can be involved.
- User Judgement Methods (U): for evaluation of user satisfaction or perception. The empirical questionnaire or evaluation task such as an interview based on the research purpose is conducted with consumers or potential consumer groups to measure levels of user satisfaction. The advantage of this approach is that unpredictable problems or facts can be observed.
- Automated Methods (A): for evaluation using developed software system to test the technical performance of certain features. Comparing to other methods, it has a consistency in evaluation process. No user involvement.
- Numerical Computation Methods (N): for evaluation of website performance, using mathematical computation functions based on a number of aspects. No user involvement. Measurable and repeatable use for a long term strategy.
- Combined Methods: any combination of the above methods to make a comprehensive evaluation.

Each method has advantages and limitations. According to academic literature and journals, it seems there is no absolute approach for website evaluation at the moment. Methods should be carefully chosen based on the purpose of this research study. Now let us examine the journal of Law et al. (2010) which methodological approaches and instruments have been applied in studies of the destination websites evaluation recently by tourism academic researchers.

Table 18: Travel and Tourism-related Website Evaluation Studies from 1996 to July 2009

Author (year)	Sector	Region	Methodology	Target sample	Instrument	Evaluation/Measurement
Jung and Baker (1998)	NTO	World	Quantitative Qualitative	Researchers, Practitioners	-	Success factor of Web design: Internet value for marketing: website design factors
Frew (1999)	DMS	Austria, England, Ireland, Scotland	Qualitative Quantitative	Researchers	C	Database, distribution, management, operation
Buhalis and Spada (2000)	DMS	World	Qualitative Quantitative	Researchers, Suppliers, Consumers	-	Success criteria from consumers/tourism sectors, stakeholders
Benckendorff and Black (2000)	RTA	Australia	Qualitative Quantitative	Practitioners	C	Planning, site management/ design/content
Oertel et al. (2001)	DMS	Europe	Quantitative	Researchers	C&U	Destination website in search engine, content, functions
Doolin et al. (2002)	RTO	New Zealand	Quantitative	Labo test	C	Promotion, provision, processing
Feng et al. (2003)	DMO	China and US	Quantitative	Labo test	C	Modified BSC model, marketing strategy, web page design, marketing information, technical quality
So and Morrison (2004)	NTO	East Asia	Quantitative	Labo test	C&A	Modified BSC model, technical, marketing, customer perspective, destination information perspective
Kaplanidou and Vogt (2004)	DMO	US	Quantitative	Consumers	U	Navigation, content, accessibility performance, website usage and satisfaction
Douglas and Mills (2004)	DMO	Caribbean	Quantitative	Labo test	C&A	Modified BSC model, technical aspects, user friendliness, site attractiveness, marketing effectiveness
Zhou and DeSantis (2005)	CTW	North America, Europe, Asia, Australia, Africa	Quantitative	Researcher	C	Website content and functions
Han and Mills (2006)	NTO	World	Quantitative	Labo test	C&N	Online promotion evaluation instrument, aesthetics features, informative features, interactive features
Choi et al. (2007)	TW, TB, TG, TM, OTW	Macau	Qualitative Quantitative	Researchers	A&U	Narrative and visual information
Bauernfeind and Mitsche (2008)	DMO	Europe	Quantitative	Researchers	A&C	Data envelopment analysis, linguistic offer, interactivity, tourism content
Qi, Law, et al (2008)	DMO	China	Quantitative	Researchers, consumers, Labo test	N	Language, layout, graphics, information architecture, user interface, navigation, general

Source: Law, R., et al., A review of website evaluation in tourism research, *Tourism Management*, Vol 31, 2010

4.2.1.1 Three Steps to Research Execution

In the surveyed tourism destination websites, the counting methods (C) were mostly employed (see Table 19). Ten of fifteen studies used it, and of those 80% adopted the quantitative approach. The counting instrument was able to demonstrate its validity more in combination with other instruments such as user judgement, automated or numerical.

Table 19: Summary of Methods used in Travel and Tourism-related Website Evaluation Studies from 1996 to July 2009

Method	C	A	N	U	Sub TTL	Quantitative	Qualitative & Quantitative
C	6	2	1	1	10	8	2
N	0	0	1	0	1	1	0
U	0	1	0	1	2	1	1
No Instruments	-	-	-	-	2	0	2
Total					15	10	5

Source: Law. R., et al., A review of website evaluation in tourism research, *Tourism Management*, Vol 31, 2010

The evaluations by practitioners or researchers would be too academic and technical for SMEs to immediately put the results into business practice. Automated and numerical methods for some websites are too complex to adopt here, however only technical aspects of website can be evaluated by automated programs as supplement research. Concerning the purpose of this thesis, the evaluation results should be accurate to measure usability level. The evaluation steps in both qualitative and quantitative approaches are employed by three steps in this thesis as drawing in Figure 14.

1. Counting method (C): The researcher evaluates the website features in effectiveness and efficiency on ANTO (Austria) and HTO (Hokkaido) websites (see Table 20) using a modified simple checklist.
Automated method (A): Only to evaluate technical integration.
2. User judgement method (U): In order to understand how satisfied the users are with the respective websites, consumers are requested to answer the questionnaire from the points of user satisfaction, user friendliness, perceived ease of use, accessibility, usefulness, etc on ANTO and HTO websites.

3. Benchmarking: HTO is compared with its best model ANTO or other competitors. The findings of website features through a checklist are examined with those of user satisfaction and perceptions to identify the strengths and weakness.

Table 20: Organization Names and Website Addresses used in this Study

Organization	Website Address
Austrian National Tourist Office	http://www.austria.info/uk
Hokkaido Tourism Organization	http://en.visit-hokkaido.jp

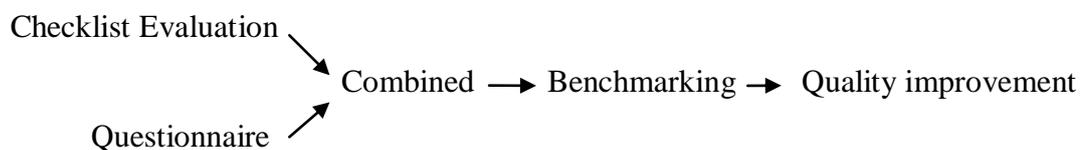


Figure 14: Image of Evaluation Approach

4.2.2 Checklist Development

Referring to journals and literature on website evaluation and in consideration of characteristics of the tourism industry, a modified checklist was developed mainly based on Tapscott’s design parameters of websites (Werthner and Klein, 1999, P288) and Douglas & Mills’s modified Balance Scorecard (BSC) for website evaluations in tourisms and hospitality business (Douglas & Mills, 2004, P279). It is comprised of five elements: i) Objective, ii) User Friendliness, iii) Site Attractiveness, iv) Market Effectiveness, v) Technical Features. This checklist evaluates critical aspects of quality design such as effectiveness, efficiency through presence parameters of essential contents, functions, design layout, attractiveness and reliability.

i). Objective:

How do users know it is a reliable website? How can users trust the author and information on the website? What is the purpose of the website? This part is to examine whether the website author has credentials in the subjects presented (authority), whether the author is careful with accuracy of the information (accuracy) and whether the website

carries out the purpose without bias (purpose). The more authoritative the author of a website is, the more accurate the information is.

ii). User Friendliness:

To examine whether the website is easy to use in the format, design and layout and look into sub-categories of web mobility, ease of contact. The relation between the usability and the design is evaluated.

iii). Site Attractiveness:

To examine the attractiveness of a website in terms of the interface, format, design, layout, pictures and visual entertainment.

iv). Market Effectiveness:

To examine how well a website is aligned with the marketing strategy, addressing the effectiveness of current market information, consistency in website design, market segments, destination attributes, advertisements, trip planner and community building.

v). Technical Features:

To examine technical aspects of utilization, relating to optimization of loading time, browser compatibility and priority listing in search engines, and legal compliance as well. To avoid uncertainty in evaluating technical integration by human judgement, a free automated program by NetMechanic (<http://www.netmechanic.com>) is partially applied. This free instrument evaluates the site links, load time speed, spell checking, browser compatibility and HTML code. Their star ratings from five to one are converted to the scores five to one.

The checklist has 82 items in total (see Appendix 4). The decision to evaluate the website by counting method in the checklist is based only on my personal judgement. Amento, Terveen and Hills (2000, P296) stated that the quality of a website is a matter of human judgement, of which site organization and layout as well as quality and uniqueness of information are major factors influencing quality judgements. It is accurate that an individual who has the tourism marketing intelligence and a better understanding of the destinations and tourism industry would make evaluation.

While doing the heuristic evaluation for each check point by five scales between excellent (5), sufficient (3), and unsatisfactory (1), the decision of which problems are addressed by further analysis is my responsibility.

4.2.3 Questionnaire Development

It is important to understand how users of destination websites perceive the elements in the checklist and whether the overall website quality is motivating them to visit the destination. As mentioned, the satisfaction level would be decided through psychological and physical experiences in utility. The reliability of a website can enhance by these experiences and be decided through definite personal perception during searching process. Therefore, the questionnaire can evaluate a user's level of satisfaction and perception. 21 questions were formed (see Appendix 5). Based on the same criteria as the usability checklist, I personally sent the questionnaire by email to eight general consumers with various demographic variables who usually travel abroad once a year or more, which consisted of five males and three females (see Appendix 8). Before answering questions, they were asked to first find the official destination websites of Austria and Hokkaido, i.e. <http://www.austria.info/uk> and <http://en.visit-hokkaido.jp>, then they were asked to answer a questionnaire for each website in the five elements of i) Objective, ii) User Friendliness, iii) Site Attractiveness, iv) Market Effectiveness and v) Technical Features. Each question allowed three options in answering, either yes, no or not sure. The results from this questionnaire would supplement the counting method as a checklist and make the evaluation more comprehensive.

5. Results and Discussions

5.1 Checklist Results

Scores for each element were calculated by totalling the scores of each subcategory, and were given a percentage of total values. Final scores were totalled by adding each of the five elements. As shown in Figure 15, ANTO generally displayed excellent performance levels in all elements and reached 82% scores overall. HTO had a very positive 62% overall and excelled in “Site Attractiveness” with a high score of 80%, while their performance in “Objective” and “Market Effectiveness” did not meet the minimum criteria.

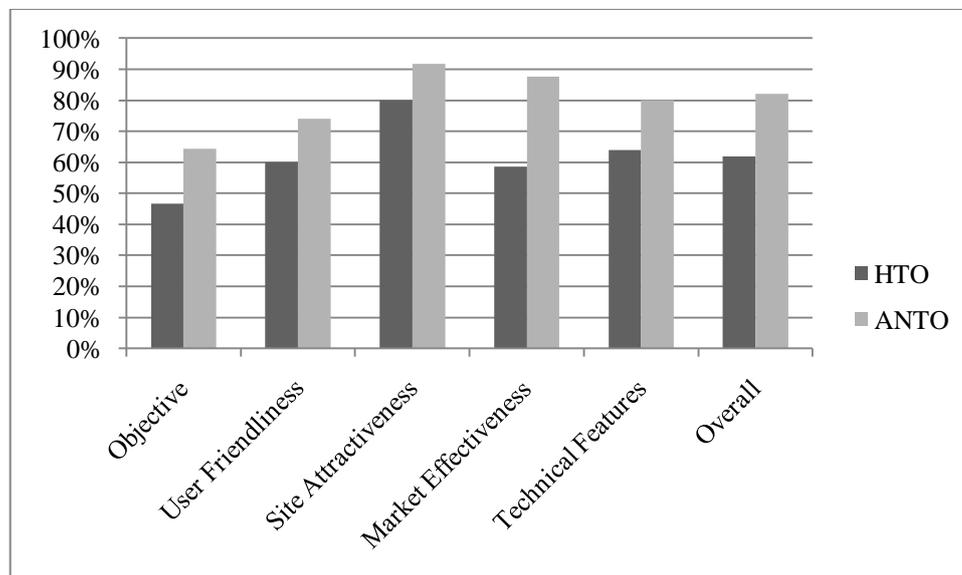


Figure 15: Performance Level by Checklist Results of HTO and ANTO

We also assessed some of the sub-elements, and some of the second level ratings. The sub-elements with lower scores need to improve performance. Setting the cut-off line at 54 % value scores, the elements which have these or less are discussed further to identify which obstacles of Hokkaido generated a 20% difference in overall scores from the ANTO website (see Table 21).

Table 21: Performance Scores by Checklist Evaluation

Element	(full score)	Hokkaido	% value	Austria	% value
<i>Objective</i>					
Authority	(15)	7	46.7%	10	66.7%
Accuracy	(10)	0	0%	0	0%
Purpose	(20)	14	70.0%	19	95.0%
Subtotal	(45)	21	46.7%	29	64.4%
<i>User Friendliness</i>					
Web mobility	(25)	17	68.0%	18	72.0%
Ease of contact	(25)	13	52.0%	19	76.0%
Subtotal	(50)	30	60.0%	37	74.0%
<i>Site Attractiveness</i>					
Web interface	(45)	37	82.2%	43	95.6%
Visual entertainments	(15)	11	73.3%	12	80.0%
Subtotal	(60)	48	80%	55	91.7%
<i>Market Effectiveness</i>					
Market information	(15)	7	46.7%	11	73.0%
Consistency	(15)	8	53.3%	15	100%
Market segments	(8)	2	25.0%	7	87.5%
Destination attributes	(27)	18	66.7%	25	92.6%
Advertisements	(10)	8	80.0%	10	100%
Trip planner	(45)	29	64.4%	37	82.2%
Community building	(10)	4	40.0%	9	90.0%
Subtotal	(130)	76	58.5%	114	87.7%
<i>Technical Features</i>					
NetMechanic/Listing	(30)	16	53.3%	24	80.0%
Legal compliance	(20)	16	80.0%	16	80.0%
Subtotal	(50)	32	64.0%	40	80.0%
Total	(335)	207	61.8%	275	82.1%

Authority:

“About us” is not set anywhere in the HTO website, it is reachable only on the B2B travel agent site. The contact address, phone number, and Fax of the HTO are placed prominently at the footer of each page, but there is no email address or “contact us”. So, the users cannot easily contact or query to the HTO.

Although the ANTO website also has no “about us”, it does have “contact” index on the menu of the header, introducing not only the head office in Vienna of Austria but also all overseas offices with contact details, which are repeated as well in the “Terms and

Condition” in the footer. It is much easier for users to find contact information online for ANTO than for HTO.

Users might not be able to verify the credibility of the HTO website even though the headline “Hokkaido Official Tourism Website” is attached on the top page because they cannot find who built the website or detect whether the website is really an official one or not. It is apparent that this is likely to have a negative effect on a users’ perception. We will reexamine this in the element user friendliness and results from the questionnaire.

- “About us” is available : 2
- Contact of the author or webmaster : 2
- Credential of the author : 3
- Total: 7/15 (46.7%)

Accuracy:

Neither of the websites has recorded a date and time of when the contents were updated. The top page is like the cover page of a magazine or book, it is the first things visitors will look at and read. In order to catch a visitor’s attention and to compel them to take a closer look and open it, most of the attractive destination websites place the latest news from the destination or seasonal highlights on the top page accompanied with a time related information such as a calendar or the latest local weather report. The content of “News & Events” on the HTO top page has not yet been updated attentively, while that of ANTO systematically lists seasonal highlights which are regularly replaced and updated. Updating the time and date is not mandatory but optional, however it gives visitors an impression that the websites information is current and therefore reliable.

- No date and time of updating : unknown
- How often updated : unknown
- Total: 0/10 (0%)

Ease of Contact:

Here, we measure the ease with which user's were able to contact HTO for additional information. On the ANTO website, visitors can quite easily find "contact" information. Most of the given pages on ANTO have a small column for visitor care whilst also with providing a phone number, email address and request forms for online brochures and newsletter subscriptions. As reported in the part of authority, the email address of the HTO is not published on the B2C site, it is only accessible through a hidden inquiry form at the very bottom of the FAQ page on the B2C site or "Contact us" on B2B site.

It seems that the HTO would rather avoid direct inquiries from consumers. At the "Contact us" in B2B site, the contact information of the HTO and the Hokkaido-Sapporo Tourist Information Centre are introduced, but only the address, phone number, fax are provided, with no hours of operation or a location map. The Tourist Information Centre is emphasized in red bold as "Staffs who speak English, Mandarin are here to help you". This should be the essential service to the tourists who need information and support during their travel, it should not be exclusively only for travel agents. Moreover, in the submenu "For emergency" under the top menu "About Hokkaido", one would expect to see a link to the tourist information centre. However, the Consulates in Hokkaido of South Korea, Australia, China, Russia and USA are listed, but they do not seem to care about other foreign countries, nor about providing helpful information for real emergencies in case of lost property, or accidents nor is there information on visa requirements.

HTO's phone number is a pilot number, which means a call centre or a hot line will answer travellers' inquiries. Tourists will feel insecure regardless of whether it is available in English or other languages. Generally, collecting useful information is not so easy for beginner travellers when planning their journey or during the trip. FAQ is a helpful list which the HTO is commonly asked. Actually, it has no table of listed questions, users have to scroll longer to the end until they find a similar question and its answer. If users cannot find any similar question, they would be invited to inquire using the contact form at the end. This searching process is time consuming and finding the inquiry form takes too long.

The URL <http://en.visit-hokkaido.jp> is not complex but not so easy to remember because

of a mixture of “en” (English) plus the dash (-) in between. This will also be examined later in the users’ perception.

- Direct email : 1
- Address, phone number, Fax : 5
- Call centre: 1
- FAQ: 3
- Easy to remember URL: 3
- Total: 13/25 (52%)

Market Information:

As on ANTO’s top page, the latest seasonal highlights are collectively introduced, while the contents of “News & Events” on HTO’s top page is not updated very often and has not provided a timeline of upcoming attractive events for foreign visitors. For instance, the Sapporo Snow Festival, one of the largest winter events in Japan, was not listed on the top page before the event (7-13 February 2011). In relation to the accuracy aspect, there are few eye-catchers on the HTO’s top page to compel visitors to take a closer look. Comparably to ANTO, information on hotels, restaurants, events and shopping in Hokkaido can be retrieved from the top menu bar easily. However, it is not possible to apply for the newsletter subscription on the HTO website.

- Current, timely, season related information: 2
- Information on hotels, restaurants, events, shopping: 4
- News release : 1
- Total: 7/15 (46.7%)

Consistency:

Layout refers to the basic framework of the website, and design is about the usage of colours, images, fonts on the pages. Consistency in layout and design is a basic rule on the website to make it easier for visitors to navigate with less stress. When the main elements still remain the same, visitors do not feel any uncertainty as if they have landed on another site. Failing to do so will make them confused or make them leave the site. ANTO achieved the perfect performance in consistent layout and design. Their website returns always have the same outlook in any language and with any search actions. Overall, HTO’s website displays a common layout and design with each respective language, though some pages have useless blank space due to a smaller volume of

content information. The official logo of the HTO or marketing corporate logo cannot be identified clearly. In the header, the masthead “Hokkaido Official Tourism Website” displayed on all pages accompanied with a smaller sub-title “visit HOKKAIDO”. It must be the official marketing logo for Hokkaido tourism (HTO offers it as a banner and link). The Korean site has the same layout and design as the English site, while the logo “visit HOKKAIDO” is shown clearly on all given pages in Chinese. Moreover the logo “visit HOKKAIDO” is not displayed on the original Japanese site, which employs an entirely different layout and design and a different logo-like has the position in the header.



in Japanese site



in other foreign languages sites

Figure 16: Marketing Logos in HTO Website

In the case where visitors who don't even understand Japanese take a glance at this Japanese site, they must be confused about whether it is the same official travel site or not. The consumer is likely to judge the site's credentials negatively, which is likely to lead to them quickly leaving the site.

- Logo displayed on all pages : 2
- Display in common design : 4
- Corporate design on any page, in any language : 2
- Total: 8/15 (53.3%)

Market Segments:

The website needs to base their designs on the marketing strategy, because the potential segments can be defined by online management more fundamentally than offline marketing. The website can focus on who to target for Hokkaido tourism. HTO's website focuses on leisure tourists and travel agents, but fails to subdivide leisure tourists into travel purposes or group sizes. The example model can show how much ski lovers can enjoy Hokkaido's natural attributes, how enjoyable, friendly and flexible Hokkaido is for young couples, family travellers with children, budget travellers, special interest groups such as disability and business travellers or congresses/conventions. None of which the website defined, as opposed ANTO. Taking a case of pictures or images on the website, ANTO and VTB use quite a lot of image photos where the tourists are enjoying the

moment in the destination, but in contrast most of the photos on the Hokkaido website are scenic and static.

The media press is not present at all on the HTO's website, which shows that the HTO have given no thought to building such a relationship. Being able to support the needs of the journalists of travel guidebooks, newspapers and lifestyle magazines, and to distribute sufficient information material on events, press releases or reports helps to gain coverage in media. As the elements of Marketing Effectiveness demonstrate the development of marketing strategy, it will be discussed later specifying some recommendations to Hokkaido.

- Market segments are leisure and travel agency: 2
- Business, family, children, couple, special interests groups (conventions, disability), media press are not segmented : 0
- Total: 2/8 (25%)

Community Building:

As discussed in the chapter of the role of internet in tourism, websites are used not only to increase awareness of products but also to maintain a closer relationship with the consumer side and collect consumers' feedback and profiles. Also, the previous social media study suggested that website usage has reached a milestone in that websites offer new opportunities for consumers to screen out diverse information, and to interact with fellows in the forum by exchanging opinions or experiences. Hokkaido has missed such opportunities through the website, while the ANTO utilizes Facebook, Twitter, Trip advisor and blogs. It also invites website visitors to sign up for the newsletter at any moment. On the HTO website, there is only a link to Facebook. However Facebook's placement, on the top page and in the centre which is usually the first article a website visitor reads, makes the webpage look rather strange. The destination website should not compel visitors to join social networks and to take a closer look at Facebook on their initial visit. Another plausible approach for building the community network needs to be implemented as Hokkaido does not have a huge presence in the social media, as proven by the previous experiment.

- Newsletter subscription : 1
- Facebook, Twitter, Trip advisor : 3
- Total: 4/10 (40%)

NetMechanic and Listing:

An automated program by NetMechanic [38] evaluated technical features (on 24 Feb 2011). The features had a star rating, with low rating features showing a need for immediate technical upgrade. ANTO's loading time was 6.93 seconds with 4-star grade, while Hokkaido's loading time was 151.25 seconds with 1-star. The same phenomenon was observed as for the previous research work for language presence on Hokkaido's hotel websites. HTO's website also has many heavy graphics, accordingly total graphics held 509,928 bytes with 58 images, the page size was 524KB which accounted for the longer load time. Contrastingly, ANTO accounted for only 1,441 bytes and 10KB. Browser compatibility reported 16 problems with a 1-star grade in HTO, while ANTO had 10 problems, with a 2-star grade.

Visible listing on search engines is indispensable if one wishes to do well in the market. In the same manner as the previous search engine experiment, several pairs of keywords in multiple combinations with destination name and "travel, tourist, info and site" were used in major search engines to find HTO and ANTO. As shown in Table 22, the ANTO was listed at the top of natural listing on Google, Yahoo, and MSN, while the HTO was quite difficult to find within the first listing pages on Yahoo, it was not retrieved on MSN at all but it did have the top listing on Google. Search engine optimization is a significant technical challenge for Hokkaido.

- HTML check ; 1 error and 2 warnings : 4 stars
- Load time ; 151,25 seconds : 1 star
- Browser Compatibility ; 16 problems : 1 star
- Spell check ; 47 possible errors : 3 stars
- Link check ; 0 bad link : 5 stars
- Priority listing : 2
- Total: 16/30 (53.3%)

Table 22: Search Engine Listing Results by Keywords Search of HTO and ANTO
(as of 24 Feb 2011)

Search Engine/ Keywords	HTO	ANTO
<i>Google</i>		
official travel site	1st	1st
official tourism site	1st	1st
travel site	5th	1st
travel info	1st	1st
tourist info	1st	1st
<i>Yahoo</i>		
official travel site	-	1st
official tourism site	7th	1st
travel site	-	1st
travel info	3rd	1st
tourist info	1st	1st
<i>MSN bing</i>		
official travel site	-	1st
official tourism site	-	2nd
travel site	-	1st
travel info	-	2nd
tourist info	-	1st
Final evaluation scores	2	5

5.2 Questionnaire Results

This questionnaire also employed the same scoring system as the checklist. The five main elements are comprehensively examined and focused on users' perception and satisfaction level. The results of this questionnaire are also shown in the following Appendix 6 and 8. To get an overview of consumer perception and make simple comparison of the results of the checklist evaluation, the numbers of positive answer "yes" in the questionnaire were replaced with a t score point 3 with percentage of the total values (see Figure 17 and Appendix 7).

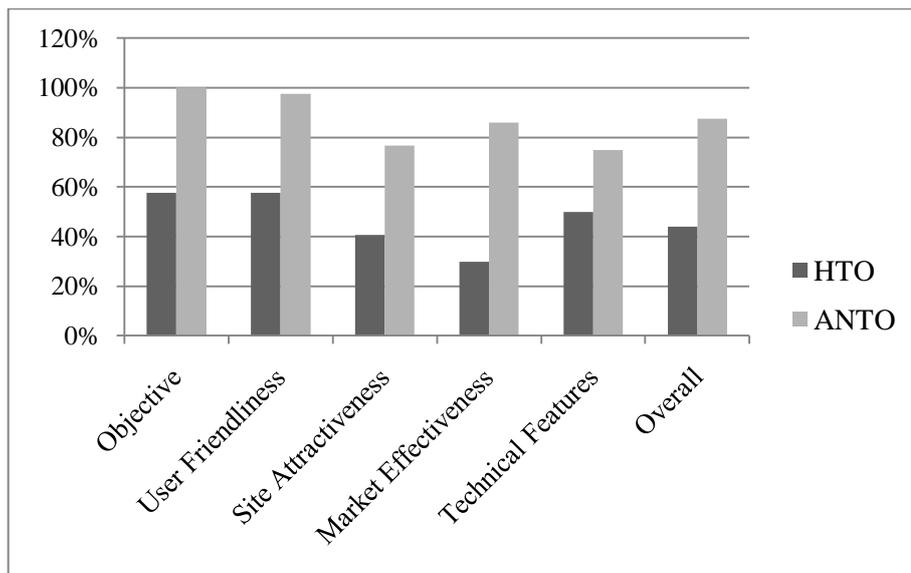


Figure 17: Performance Level by Questionnaire Results of HTO and ANTO

Overall, ANTO scored higher in every element, which means that customers had a higher level of satisfaction with usability of the ANTO website. The checklist evaluation for Hokkaido discovered their higher level in Site Attractiveness (80%) and relatively lower performance in Market Effectiveness (58.5%). Here remarkably, a research gap was observed. Consumer perceptions indicated an unfavourable performance on the Hokkaido website in Site Attractiveness (41%), as well as in Market Effectiveness (30%).

Objective:

In this section, their answers represented the consumers' indefinite perception toward Hokkaido website. ANTO performed perfectly in this element. During the initial surfing of the HTO website, all respondents were inspired to holiday in Hokkaido. The first impression of the HTO website was very positive. 6 out of 8 respondents (75%) clearly understood the purpose of the website was for tourism, though 7 out of 8 respondents (87.5%) had some difficulty in finding who the web author was. Half the respondents did not know whether they would return to the HTO website to search for further information or if they would recommend it to their friends. So, to sum up, in the end the respondents were not satisfied with the HTO website. What is behind this phenomenon? What kind of difficulties did they face? For the answers, we must extract and examine the negative responses.

User Friendliness:

Here, we measured how much the format, design and layout on website helped to direct the users. Correspondent to the checklist evaluation, overall the respondents' answers on the HTO regarding user friendliness were positive. Web mobility and navigation worked well. The website of HTO uses Google analytics as ANTO does. However, the search function within the HTO website seems to have a problem as all respondents answered that the search function was slow to assist and to provide correct information. It means they were not happy with the given information or unable to get useful information about what they wanted. This could be one of the negative factors to affect the satisfaction level of the consumer's physical experiences, which were different from ANTO's higher scores.

Here, a casual experiment enacted to look for basic information using simple keywords in HTO's internal search function. The first two to three results were given as follows (as of 24 Feb 2011).

- Keyword: Otaru
 - Canal Inn Otaru Furukawa (hotel)
 - Hotel Neuschloss Otaru
 - Yukiakari no Michi (Otaru Snow Gleaming Event)
 - ❖ Hotels in Otaru were mostly found on the first given page, no general information on Otaru was presented.
- Keyword: Sightseeing
 - Sightseeing Highlights (Web magazine vol. 1 and 2)
 - Drift Sightseeing (Ice boat)
 - Sightseeing Ice Breaker "Garinko 2" (Ice boat)
 - ❖ Highlights or recommendations for general sightseeing were not given.
- Keywords: Ski resorts
 - Ski/Snowboarding (List of ski resorts)
 - Tourism Brochures (Hokkaido winter resort guidebook)
 - Niseko Annupuri Kokusai (Ski resort)
 - ❖ General information on ski resorts was retrieved successfully.

- Keyword: Restaurants
 - Restaurants & Bars
 - ❖ It was just a short description of restaurants in Hokkaido, no photos for either list of restaurants or recommendations.

As proven from this research, the respondents were supposed not to be able to find general information by simple keyword searches from the website. HTO's website's shortcomings may have more to do with content management, rather than technical problem. Information not listed on the website database is also not available by search function. For instance, ski resorts in Hokkaido are well listed in the website and its database, therefore internal search function responded well to the keywords "Ski resorts". However, there is no general information on Otaru in their database. In the submenu "Basic information" under the top menu "About Hokkaido" introduces five geographical regions of Hokkaido, however it is not explored in depth, nor are there further links to regional tourist office websites of Hokkaido. A website visitor who does not know which region the place belongs to but knows only the city name cannot find general information on the place. Hence, he/she needs to switch to the general Google search or leave the HTO website to find helpful travel portal sites.

For beginner site visitors who have no idea which keywords are effective in searching on the website, ANTO lists 86 tip keywords for activities in Austria in the right hand upper column constantly. The popular city names and important attributes for Austria such as Alps, culture, music, nature, ski and hiking, furthermore types of travel such as city breaks, family & children are available. Also, for those who would like more details about certain places, "Province & Regions" provides brief information on respective regions and links to regional tourist office websites. These add value to the website and increase its usability level.

The HTO website has another search box only under the main menu of "Travel Planner" and "Accommodations", where website visitors can select the area, location, interested topics and keywords by drag and click. Regretfully, it is not present on other pages. The URL of ANTO is memorable to most respondents, while half of them (4 out of 8) answered that HTO's is not an easy domain to remember. A series of small missteps in usability influences the consumer's experiences and perceptions.

Site Attractiveness:

As the results have so far shown, the quality of given information might be a problem on HTO's website. Some answers in this part supported this assumption. 5 out of 8 (62.5%) replied negatively that the text was not clear nor easy to read, and almost everybody answered that the information received from search inquiries was not clear, relevant or appropriate, which corresponded to their experiences in the previous casual keyword experiment. Most of the respondents felt that the photos used on the HTO website were impressive, which motivated them to travel there, but in the end they were not encouraged to travel to Hokkaido alone or in a small group. In fact, all respondents were inspired to holiday in Hokkaido from their initial surfing of the website. However, their satisfaction level decreased the more they searched for online information. Was it caused by incomplete content of information? Just having an attractive appearance won't increase user satisfaction level.

Market Effectiveness:

6 out of 8 respondents (75%) had doubts about whether the contents on the HTO website were up-to-date. They found it easy to locate information on accommodation but were not satisfied with the given information on events and attractions. As anticipated, all respondents answered that products and services were not only badly listed, but the information given was not thorough. Possibly, the grouping of the product services was overcrowded for users, as well as the lack of proper classification, and Hokkaido's main attributes being improperly presented in the navigation bar. The usability of a website relies inherently on human judgement. The structure of the index of contents, respective hierarchical menu, and the information quality in the website design must be examined in detail.

Technical Features:

Half of the respondents found it difficult to find the HTO website on these respective search engines, Yahoo, MSN Bing or other than Google. Research customers who cannot find the official travel website of Hokkaido by the search engines will have little chance of visiting the HTO website in the near future, and would have to make a decision on whether to go to Hokkaido using information through other information sources, travel sites or social networks. The results from the checklist evaluation and questionnaire identified some common critical issues. Before moving on to making suggestions to

Hokkaido for improvement, let us continue a discussion about their strengths and weaknesses and a further case study on how the missing points observed in the HTO website are carried out in Vienna (<http://www.vienna.info/en>) and Otaru (<http://www.otaru.gr.jp>).

5.3 Strengths and Weaknesses of the Hokkaido Destination Website

Based on the results of the checklist evaluation and questionnaire, the strengths and weaknesses (missing points) of the Hokkaido website have been listed together.

Table 23 summarizes a process where the consumer's satisfaction level decreased between the initial and final experiences.

Table 23: Process of Consumer Satisfaction Level on the HTO Website

(+) Respondents were inspired to holiday in Hokkaido during the initial surfing.

Strengths	<ul style="list-style-type: none"> Site attractiveness in web interface, visual entertainment Primary positive impression of the website Primarily inspired to holiday in Hokkaido Impressive photos motivated users to travel User friendliness Navigation design
Weaknesses	<ul style="list-style-type: none"> Who is the web author? Credentials? No email address Tourist Information Center Site map, FAQ Convolutated path to inquiry form Unmemorable URL Unable to find clear and relevant information to research questions Inadequate search box Accuracy of information Quality of content information (events, attractions) Listing of products and services Classifications of destination attributes Market segments Corporate logo Consistency in design and layout Community building Technical features (loading time, browser compatibility) Priority listing in search engines

(-) Respondents don't know whether they would come back to the HTO website or recommend it to their friends.

(-) HTO website did not motivate them to travel to Hokkaido alone or in a small group.

Now, let us study how the missing points on the HTO website are managed on the official websites of Vienna and Otaru. On the VTB website, the folder of "Imprint" is placed at the bottom menu bar together with the "Copyright" and "Terms of Use". "Imprint" is available neither in the Hokkaido nor in Austria websites. It demonstrates clearly who is the owner or the publisher and what the purpose of the website is. The folder "Contacts" placed at the top right of every page on the VTB website gives the phone number, Fax, office hours and email address for inquiry. Also these pages tell about their tourist information centre specifying the address, opening hours, and additionally, the person who wants to know more about the VTB is navigated to visit their B2B site with a direct link. It is very helpful that the red icon of the tourist information centre and call centre number are always visible at the right bottom of every page. Such a series of arrangements takes good care of user friendliness and works positively to increase the reliability of the website in user's perception. Needless to say, the URL www.vienna.info is plain and doesn't cause any confusion for users to remember.

The Otaru Tourist Association (OTA) is the website owner and author of the official tourist website. Firstly, their landing page had a negative impact on user's perception. It offers five languages, Japanese, English, Chinese (Mandarin and Cantonese) and Korean. Clicking a preferable foreign language shows a technical warning that *"The website can be machine translated using a private automatic translation system. It is not necessarily a perfect translation. Due to the above-mentioned reason, translated pages may have different meanings from the original"*. The person who agrees with this message needs to click the start button again to get into the website. Hereafter, any given page has a warning message at the top line – *please note that the content may not be 100% accurate*. Although the website author is undoubtedly referring to the accuracy of the translation, this statement gives the website visitors doubts about the overall reliability and accuracy of the website and the provided information, which is then likely to elicit unfavourable feelings from each transaction. Whoever feels distrust about this process is reluctant to pass this step and may stop visiting the website in favour of searching from other information source.

The address, phone number and email address of OTA are clearly displayed in the footer on English site. The email address directs you to an inquiry form. The folder “Inquiry” is also placed in the top menu bar as well. The folder “About OTA” (about us), which is not available on the Hokkaido website, is placed correctly. The page introduces OTA’s three information centres and its respective opening hours. Their domain - gr.jp is not as familiar as gv.jp. It makes an impression on foreign internet users that the country codes of Greece and Japan are somewhat mixed which is confusing. Overall, the authority of OTA as a web author is explained well and this website tries to explain and describe something interesting about Otaru. However, the application of translation software is an initial bottleneck and a critical issue as serious as the content quality. It is necessary for the OTA to plan prompt action for technical improvement including an online domain name.

In respect of market effectiveness, the VTB’s logo is consistently on the header, and the common design and layout are always carried out on any page, in any language. The URL is not only for the access in WWW but also plays an important role in marketing performance. The logo of WTV is integrated with the URL. Although the Otaru website displays the logo on the header, neither the headline nor the secondary headline is clear.

Generally the right hand column on the website template provides links to supplement information or is used for small applications such as video clips on You tube, newsletter subscriptions, latest news and so on. Both ANTO and VTB have a column for newsletter subscription on most of the pages. Currently, ANTO has 700,000 and VTB does 125,000 newsletter subscribers worldwide (Source: ANTO; Email to the author. 11 Feb 2011, VTB; Email to the author. 25 Mar 2011). VTB joined Facebook and created fan pages in English and German, Twitter is available only on the B2B site. An interesting device on the VTB website is the rating indicators where website visitors can immediately rate how helpful an article was on a five-star scale. Additionally, they can write feedback to the website editorial team. VTB is attentive to communication building with the consumer side. A website which encourages website visitors in participation raises consumers’ attention and pleasure on the website as a consequence.

Otaru has built an official blog site in English under their official website, where OTA's staff members write journals and talk about their recent experiences or events in Otaru. Moreover, OTA has engaged the services of a hotel reservation portal site (<http://www.otaru-tabibitokibun.com>) in Japanese, which has a direct link with the OTA website. As their translation software doesn't work in its' booking function, only Japanese or foreigners who understand Japanese can make online hotel bookings. Their blog and hotel reservation portal have a very attractive appearance, and seem more interesting than the original OTA destination website. Why aren't they integrated? The original OTA destination website, staff blog and hotel reservation portal can be orchestrated to work with one another, which could not only increase productivity but also cost effectiveness. The system integration and its optimization would be a shortcut for OTA to succeed in user friendliness and site attractiveness.

The VTB is consistently listed within top 3 on the major search engines (as of 24 Feb 2011). Pairing the keywords "Vienna + travel site", however, has a tendency to lower their position on any search engines. OTA has a far from visible listing on the major search engines (as of 24 Feb 2011). Any pairs of keywords using "Otaru, official, tourism site, travel site, travel info, tourist info" could not find OTA. "Otaru + tourist association" resulted in being listed 6th list on the first page on Google, whilst MSN listed OTA at the top. As discussed before, visible listing on search engines is indispensable if one wishes to do well in the market. Websites are the first tool that consumers use in their search for information. Regardless of how attractive a website is, if it is not listed in the higher rank on the search engines, there is little chance that it will be found by other information sources.

The quality of contents, classification of destination attributes and market segments have not yet been examined in this paper in depth so far, which is closely related to the marketing strategy. Otaru has a serious problem which needs to be improved immediately before further evaluation. Unfortunately, it seems reasonable to conclude that they have not yet attained an advanced level in e-tourism. The models of ANTO and VTB are ideal for delving deeper into the logic of e-marketing structure. Let us focus on these two organizations, with the findings from the case study of ANTO and VTB in these respects being the best models for Hokkaido.

5.4 Case Study of Austrian National Tourist Office and Vienna Tourist Board in e-Marketing Strategy

Marketing is a process of understanding the needs and demands of customers, identifying distinct target markets and developing marketing offers which deliver some key benefits and values to the right target customers to satisfy their needs. The offer is a combination of product service, information and experiences.

The destination brand carries many associations of the place, which makes up the image of the place in the consumer's mind. A destination who wants to attract more visitors must carefully study trends, identify the authentic attributes of the place and define the target segments. In order to achieve this goal, DMO strives to build positive authentic images of the place and then match supply to demand.

The B2C website of HTO is available in 5 different languages: Japanese, English, 2 Chinese (Mandarin and Cantonese), and Korean. There are 13 different languages on the VTB B2C website: English, German, Italian, French, Spanish, Russian, Hungarian, Polish, Romanian, Czech, Japanese, Arabic and Chinese. The ANTO B2C website is available in 27 languages for 33 countries. It is interesting to note that the characteristic of ANTO B2C site is produced for respective potential market area, not by language unit. For instance, ANTO runs 3 different English websites for 3 different market areas: USA/Canada, UK/Ireland and Australia. ANTO well understand that consumers' interests and behaviour might be relatively different according to regional culture and lifestyle. There is hardly a change in content among these three English websites, only the highlight on the top page is slightly different respectively. It is an added advantage that the ANTO website has as a user friendly website.

ANTO identified five fascinating attributes of holiday in Austria from their tourism resources: 1) Culture, 2) Nature, 3) Cuisine, 4) Well-being and 5) Hospitality. To find segments which fit these properly, ANTO employed a marketing consulting tool - the Sinus-Milieus® (see Table 24). It classifies people according to types of attitudes to life and the way of living. The vertical axis represents social status level, divided into three layers, while the horizontal axis has three layers of basic values in lifestyle.

Table 24: Sinus-Milieus® in Europe and North America

1) Upper		Sinus B1/2	
2) Middle			
3) Lower			
Social Value	A) Traditional	B) Modern	C) Reorientation

Source: Das Markenhandbuch für den Österreichischen Tourismus 2008. P18

People who vacation quite often, have more interests in travel, culture and culinary and are active in a regeneration of their lifestyle belong to the group Sinus B (modern) on the horizontal axis. People who can take vacations quite often need to be in a favourable situation with regard to income and leisure time. This means potential travellers should be from the middle to upper social situation level. Finally, ANTO focused their potential market segment at Sinus B1/2 (modern, middle to upper class), socio-demographically target model is a couple between 35 and 65 years old, whose family consists of three or more family members with children or empty nesters. This is correctly reflected in the image of photos across the ANTO website and in the contents of information.

Now, let us look at how the five attributes of Austria are displayed on their website. These are renamed with understandable words and put together in the folder “Planning” at the top menu. It is also interesting that all main menus have a subtitle, which is visible only by touching the menu icon. “Planning” says “find your perfect holiday”.

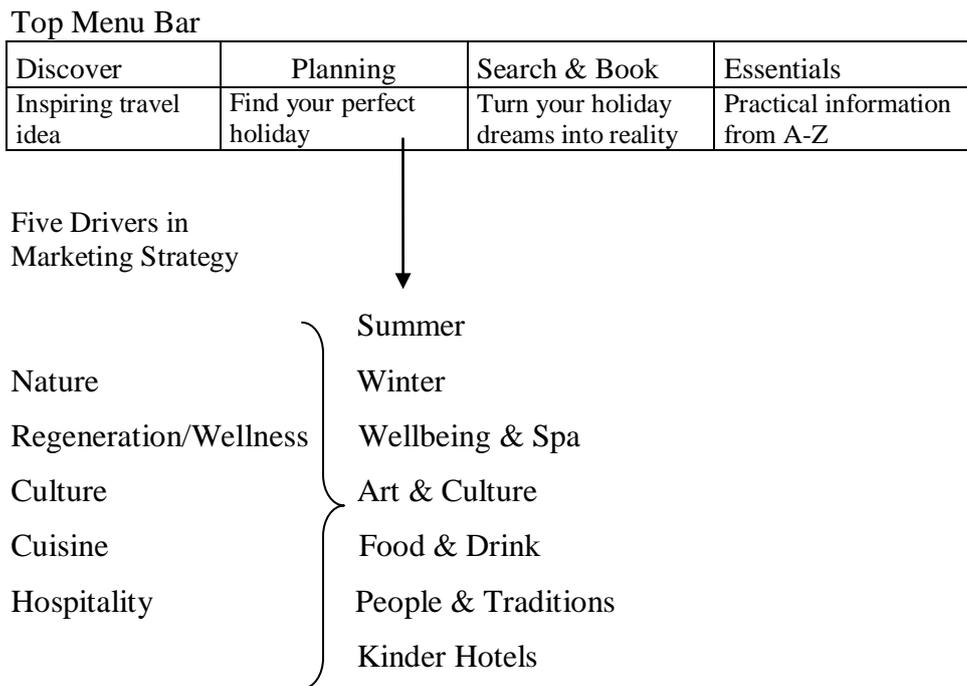


Figure 18: Relationship of Top Menu Bar and Destination Attributes on Austria

Source: ANTO B2C website <http://www.austria.info/uk> (as of 27 February 2011)

ANTO website employs the hierarchical menu system in the website architecture, which allows the web author to deliver varied information to the market depending on the level of site visitor's interest and make it easier for visitors to find out what they really want to know systematically among the enormous content. Site visitors gravitate to their core interests without feeling stress.

As discussed before, Vienna has set five marketing drivers: 1) Imperial Heritage, 2) Music and Culture, 3) Food Culture, 4) Superb City Infrastructure and 5) Green Space in the City. Imperial Heritage is the base of attractions in Vienna, which are converted into the highlights of sightseeing in the top menu bar. Its submenu folders use easy words to offer more helpful information in depth. Music & Culture are represented in the main menu, and Food Culture is also introduced in the main menu accompanied with shopping charm. Green Vienna and City Infrastructure represent quality of life and are included in the submenu under the sightseeing folder. General travel information offers tourists to Vienna some benefits from the city infrastructure. VTB did tailor two target groups socio-demographically, like ANTO did. VTB have targeted segment having middle to higher education and income at the social status, who is classified into two groups by

ages: 20 to 39 years and 40 to 59 years. It seems that Vienna would like to be almighty to any tourists, any interest groups or any purposes of visit, however the content is made up with flexible ideas inventively to fit these two generations. For example, the other main menus such as “Vienna for...” and “Lifestyle and scene” offer additional tips for ways other interests groups can enjoy Vienna.

As for the website where anyone can retrieve helpful information, the content of information and its quality must have been carefully managed. The attractions in Vienna are not affected so much by seasons and are available to tourists almost all the year round. Therefore, destination attributes of Vienna could stand independently in the top menu bar. While Austria has two distinct seasons with available attractions, destination attributes from nature have to be classified by summer or winter as described above. Hokkaido should refer to the Austrian model rather than Vienna’s.

There are 53 submenu indexes under 9 main menus on the HTO website; it looks overcrowded compared to ANTO and VTB (see Table 25). The distribution structure on the HTO website has not followed a hierarchical system. This website is basically a single page description of the subject, there is no further 2nd or 3rd hierarchical submenu. Some pages have external links or PDF files for further information if available. Therefore, website visitors need to visit each submenu and scroll down to the end of the single page in their search, and to see if there is any information available about their topic of interest which is a burden and time consuming. The essential information on Hokkaido is sinking deeper in a given submenu page. For instance, information on “Passport and Visa” and “Entering the country/Customs house” are at the very bottom of the submenu “before you leave” under the top menu “Access”, which is a wrong allocation and beyond user’s intuition. On the page “Access” overseas airlines providing direct service flights to Hokkaido are listed. It is really access information on how to get to Hokkaido from neighbouring countries but nothing else. Essential travel information and accessibility options to and within the destination is better to be relocated in easy words as ANTO and VTB have done. Lodging of main menu indexes and its submenu should go through a significant overhaul for utility improvement. It confirms that more representative presentations about destination attributes and the best allocation on the website could upgrade the quality of the HTO website and user satisfaction.

Table 25: Comparison of Main Menu and Submenu in the Top Menu Bar

ANTO	VTB	HTO
27 languages for 33 countries	13 languages	5 languages*
Main menu : 4	Main menu : 6	Main menu: 9
Submenu : 16	Submenu : 37	Submenu : 53
Discover (<i>inspiring travel ideas</i>) Slide show	Sightseeing Sights Museums & Exhibitions Architecture & Design Prater Tours & Guides Green Vienna Excursions	About Hokkaido Basic Information History Magnificent wildness Flower land Hokkaido Culture/Customs Basic Knowledge For Emergency
Planning (<i>find your perfect holiday</i>) Summer Winter Wellness & Spa Art & Culture Food & Drink People and Traditions Kinder Hotels	Music & Stage show Vienna – the City of Music Classical Opera & Operetta Musicals Dance Theater Pop, Rock, Jazz & more	Travel Planner List of 2059 sights in Hokkaido Search box
Search & Book (<i>turn your holiday dreams into reality</i>) Accommodation How to get there Once in Austria Offers and packages of the month!	Shopping, Wining & Dining Shopping Coffeehouses Viennese Wine & Heurige Restaurants Viennese Cuisine Markets & Districts to Savor	Access Before you leave Access to Hokkaido Transportation in Hokkaido
Essentials (<i>practical information A-Z</i>) About Austria Province & Regions Interactive map of Austria The Austrian way Travel planning Practical information	Lifestyle & Scene Nightlife “In”-places Trend shopping	Events Sightseeing Highlights Event Schedule Leisure Facilities Driving Hokkaido in a movie and a drama
	Vienna for.... Families Gay & Lesbian Wedding in Vienna Luxurious Vienna Learn German Sports in Vienna Jewish Vienna	Activities Ski/Snowboarding Playing with Snow Drift Ice Sightseeing Hot Air Balloon Riders Rafting Canoeing Horseback Riding Golf Whale/Dolphin Watching Mountain Climbing Trekking & Footpath Walks Cycling Fishing Camping sites
	Hotels & Travel Info Hotels & Accommodations Vienna Card FAQs Getting to & around Vienna City Map Tourist Info Accessible Vienna	Food Ramen Crab Mutton Barbecue Sushi Alcohol Sweets (Farm Style) Local cuisine Seafoods Farming Products Restaurants and Bars
		Hot spring Central Area

		Southern Area Eastern Area Northern Area Highlighted Hot Spring Spots Hot Spring Spots Highlighted One-Day Facilities One-Day Facilities
		<i>Accommodation</i> With Private Open air Hot Spring Hotels Japanese-Style Inns with Hot Springs Youth Hostels
		<i>Shopping</i> Electronic Store Shopping Malls

Source: ANTO, VTB, HTO (as of Jan.2011)

* Mandarin and Cantonese counted as 2.

6. Suggestions for Improvement to Hokkaido

There are several challenges for Hokkaido. The findings of comparative studies contributed to a better understanding of web applications, these suggested the provisions on how a website has to be aligned with marketing strategy and confirmed the usefulness of distinguishing a tourism website on the basis of the level of evaluating parameters.

Objective:

Developing and maintaining credibility is the first issue. The authority level would be improved with the addition of an “Imprint” and “About us” column. It is not necessary to explain the organization in detail but clarifying the general profile of the organization, its mission and the purpose of the website is needed. The person who wants to know more shall be navigated to the B2B site. These applications appear official, professional and credible.

User Friendliness:

It is more efficient to always display contact information (including email address) in a prominent place on any given page. Also, there should be an email contact not just in “Contacts” but also in “Imprint” and “About us” which could transform directly into an inquiry form.

A Tourist Information Centre is a big help for tourists who need information on the spot. The locations, its opening hours, services, and available languages for communication have to be clarified, placing a visible icon  on any given page.

An internal search box should be provided via sufficient databases (content management is the first consideration) by dates or period and location within the region to look for information on events, attractions, activities, accommodations, restaurants and shopping, which would keep the website visitors engaged longer with the site. Additionally, the site map would offer easier search procedures for users.

Site Attractiveness:

The findings from the questionnaire contribute to ways of improving this element. Text on given pages should be clear and easy to read. Although the website looks attractive due to the marvelous scenic photos, there also need to be photos of tourists enjoying their holiday in Hokkaido, according to the target segments. Also it encourages the website visitors to travel alone or in a small group.

Taking advantage of trust indicators for Hokkaido, testimonials, universal certificates such as UNESCO and Ramsar Convention, media coverage, and press articles would be incorporated in a folder on the website.

Market Effectiveness:

Improving the accuracy of information is essential to ensure user's satisfaction.

In order to keep good level of consistency across the website, the official corporate logo "Visit Hokkaido" should be placed prominently at the header area with image photo(s), on every page and on each language site. The URL is an important marketing tool to direct customers frequently toward Hokkaido as a travel destination. Also, it's best if the URL is easy to remember and integrated visually with the logo on any marketing materials and activities as Figure 19. It would raise consumers' awareness of the website.



Figure 19: Provisional Logo for Hokkaido

How well the website visitors can manage to perform their intended tasks and communicate within the website is an indicator of site attractiveness, market effectiveness and user satisfaction. B2B sites should take care to support the press media and tourism professionals on their site.

In order to get to know the potential customers to Hokkaido personally, building one-to-one relationships and social networks should be created by making accommodations for a newsletter subscription service, Facebook and blogs. In Austria there are some good examples of integrating travel site and social community.

"Bergfex" (<http://www.bergfex.at>) is an Austrian based holiday travel portal site, which distributes leisure information on Austria, Germany, Italy, Switzerland and Slovenia.

It illustrates how to demonstrate seasonal enjoyment across the website. For the sake of user convenience, the activities are clearly divided into two seasons: summer and winter. As the content is product/activity oriented, site visitors easily go further into the website to find holiday destinations by selecting interesting outdoor activities. If site visitors need assistance in acquiring further information, they can visit the forum on the website. Another example is “Alpengluehen” (<http://www.alpengluehen.com>). It is an Austrian social community for sports and leisure time, offering the community a virtual meeting place to search for leisure tips of the Austrian resorts. This site also hosts an activity database and a social network. Available activities are clearly presented on the top menu bar with appropriate words and icons, so that site visitors will not be confused about how to search for the interesting information. Additionally, their search box provides the available information from their database and opinions from the blogs. To increase users’ satisfaction level in searching information, it is indispensable to enrich volume of the database.

Market information should regularly announce up-to-date events and local highlights, and should talk to the community and link to the blogs. People will find the product service of the place without having to search hard, interact with the destination more without having to leave the website, and eventually such a process will play a role through online word of mouth. In return, feedback and opinions from the community forum will facilitate the improvement of the quality of product service and the destination itself. ANTO and OTA have implemented official blogs which is a challenge to Hokkaido to move toward the consumer side. The interactive menu such as newsletter sign-up, Facebook, blog, photo gallery and video clips are better placed at the right hand column on every page.

The interactive benefit the ANTO and VTB websites deliver to consumers is rather richer than Hokkaido’s. Both websites and OTA (but only in Japanese) have the function to search and book accommodation online. The market for online booking holidays is growing, therefore tourism organizations and destinations have recently realized the potential opportunity to improve functionality of the website by providing more accurate information online to consumers. Often, tourism organizations outsource their online booking service to a content provider or specialized company.

“TIScover” (<http://www.tiscover.com>) is a successful example of a destination oriented system, which was initiated by Tirol Werbung GmbH (Tirol Tourist Board) in 1989. Tirol is one of the most important Austrian leisure destinations, however, their limited access to the market due to SMEs structure (Werthner and Klein, 1999, p198) on the supply side made them decide to establish their common travel portal for the Tirol region. Nowadays, the developing portal allows consumers to reach many destinations, not only the Austrian Alps but also the surrounding alpine area of Germany, Italy and Switzerland and to find in-depth tourist information for each country, region and city with real time online bookings and reservations for over 25.000 accommodations [39]. TIScover has created a community platform for tourism marketing where all partners cooperate to compete, learn from other partners, share costs and promote their destinations more efficiently (Buhalis, 2003, p306). Involving DMOs has the advantage of having a technical system and booking facility with respect to cost efficient marketing. Online booking is now a crucial aid to have on tourism website. To attract more visitors from overseas and domestically, this type of community developed approach to tourism market would fit Hokkaido, because Hokkaido has a similar structure in tourism industry as Tirol.

The potential target segments for Hokkaido have been discussed in “Demands by Foreign Visitors” (Chapter 2.3.4) and in the “SWOT Analysis” (Chapter 3.4). In order to increase the volume of inbound tourists to 1.1 million by 2012 as declared by the Hokkaido Government [40] and to increase their average overnight stay to 7 days in Hokkaido, leisure tourists need to be classified by travel purposes, group size or socio-demography. The market surveys by JTA indicated that travellers to Japan from Europe, USA and Australia tend to stay longer and are likely to travel individually or accompanied with their family, a spouse or partner [16]. The website’s contents need to concentrate on some models of travel purpose or group size, giving recommendations and providing tips to budget travellers, family travellers, young couple, and so on. Until the tourism infrastructure such as transportation, local incoming agencies and hotels is in order with international standard, the higher social level couple who has many overseas travel experience individually (as Sinus B1/2) from Europe, USA and Australia might be the temporary target for a time being.

Grouping of authentic attributes should have comprehensive presentation of the destination and its regions and need to be classified correctly by representative words on

the website. On the basis of surveys to foreign travellers to Japan and the text from “About Hokkaido” on the HTO website, the main attributes would be: 1) Nature and Landscape, 2) Hot springs/Well-being and Japanese Inn, 3) City Excursions, 4) Food and Shopping, and 5) Essential information all about Hokkaido can be independent as a main menu, 6) Search for accommodation, travel planner and tourist information center would be integrated in one.

Like Austria, Hokkaido has two seasons. To facilitate user’s search and to quickly retrieve information, all activities, events, highlight attractions are subcategorized by summer or winter. Moreover, it should be noted that the descriptions of attributes and content should be addressed to the segmented targets’ interests and clearly present them with a differentiation from similar destinations.

Technical Features:

As the diagnosis by NetMechanic indicated, browser compatibility and reducing load time are crucial to technical development. Also, improving how the HTO website interacts with search engines to get higher ranking for a particular or a pair of keywords ensures that the market audience can find the HTO website as an official destination site.

This is a short summary of recommendations of how the website would reach a better utility level by implementing minor redesigns where users will satisfy their expectations and will increase their desire to travel to the destination, but these do not cover all factors. Even small scale websites may be perceived to be of high quality if they allocate information properly across the website. Taking the above all points into consideration, Table 26 is prepared as a suggestion for better presentation of attributes of Hokkaido.

Table 26: Suggestion for Menu Presentation to Hokkaido Destination Website

Main Menu	Submenu 1		Submenu 2
Nature & Landscape	Summer	Magnificent Wilderness	Animals & Plants, National Parks, Mountains, Lakes, Rivers & Waterfalls, UNESCO (World Heritage, Geopark)
		Flower Land Hokkaido	Flowers in Hokkaido: Lavender, Alpine Plants, Hamanasu (Rugosa rose), etc
		Seasonal Activities & Events	Activities: Trekking& Hiking, Mountain Climbing, Cycling, Golf, Camping, Horse Riding, Natural Gardens, Waterfront Sports: - Fishing -Canoeing -Rafting -Whale watching Leisure Facilities, Events: Hot Air Balloon Riders
		Driving in Hokkaido	
	Winter	Looking for the best quality snow?	Ski/Snowboard Resorts, Winter Sports Activities
		Seasonal Events	Sapporo Snow Festival, Athletic Competition, Drift Ice Sightseeing
Hot Springs & Wellness	Hot Springs in Hokkaido	Value of Hot Springs	Hot Spring Spots by Area -Central -Southern -Eastern -Northern
	Packages/Offers	Tips for Experience	One-Day Use Package program
City Excursions	Must See cities in Hokkaido	Sapporo Otaru Asahikawa Chitose Hakodate Kushiro Noboribetsu	Selections for Sightseeing, Museums, Exhibitions, Zoo, Amusement Parks, Guided Tours, Excursions, Model Courses
Food & Shopping	Authentic Food and Cuisine in Hokkaido	Local cuisine & Specialty, Sushi & Sea Food, Sweets & Dairy Products, Beer/Sake/Wine/Whisky	Recommendations of Restaurants, Bars, Markets

	Shopping	Local Special Souvenir, Sweets, Electronics	Lists of Shopping Malls or Shops, Tips for Shopping, Tax Free Shopping
Essentials	About Hokkaido	Geography History Culture Climate GMT	Map Weather Forecast
	Provinces & Regions	Sapporo Central Southern Eastern Northern	Links to Regional Tourist Offices' websites
	Testimonials & Awards	UNESCO Ramsar Sites Michelin Green Guide Movies and Dramas Media Articles	
	Access	Access to Hokkaido Transportation in Hokkaido	By Air, Ship, Train, Car
	Basic knowledge	Passport and Visa Customs Procedure Currency/Exchange Taxes Money/Credit card/ATM Postal service/Tel Power voltage Business hours/Holidays	
	For emergency	Safety Instruction Police Stations Lost & Found Foreign Embassies in Japan	
	FAQs		
	Tourist Information Centre	Locations, Opening Hours, Available Languages and Services	
Search & Book	Accommodations	Hotels, Japanese Inns, Youth hostels,	
	Travel Planner & Internal search box	Find Locations Find Accommodations Find Events Find Attractions (by season, period)	

7. Conclusions

A website must have good navigation, useful content and accessibility. This thesis research was undertaken to investigate the important features of DMO websites and the correlation between the scale of e-tourism and tourism growth in Hokkaido. More observations or more detailed analyses might be needed to know the relationship, due to the limitations of the small sample size used for questionnaire. It should be increased, however these eight respondents reflected the sample of typical consumers and the reliability of their answers was at the acceptable level to find consumers' perception. The methods used in qualitative and quantitative approaches have achieved the goal by making a relevant set of industrial analysis and performing the website evaluation through a modified checklist and questionnaire, and identified their strengths and weaknesses of Hokkaido by benchmarking.

The comparison study reveals that overall Austria is dynamic in e-tourism management, but Hokkaido is rather static. The outcomes have confirmed the usefulness that the website evaluation would be an applicable approach to measure Hokkaido's tourism competence. A series of industrial analyses gave us an overview that several factors in Hokkaido's supply side have not yet developed well enough for receiving foreign tourists. The benchmarking with competitors helped to assess the existing e-tourism of Hokkaido and to be aware of international criteria and trends, which also confirms that the ability to achieve a global standard is a significant key factor for being a global player in tourism.

The internet is one of the most effective tools in marketing management. In order to reach and attract the market on the demand side, marketers make good use of it as a communication channel between suppliers and consumers. Hokkaido is underutilizing the power of the internet. DMOs like the Hokkaido Tourism Organization are the intermediate between supply and demand sides in tourism industry. They need to be conscious of underlying trends in monitoring customer behaviour, reaction and acceptance. This encourages them to be able to identify the potential customer groups and decide which segments would be the greatest opportunity to deliver the central benefits of products or services.

E-tourism is only a part of marketing management, but it is an essential part. The results of this study show that there are more opportunities for Hokkaido to improve the level of

websites particularly in market effectiveness. The dynamic e-information from the destination will successfully deliver value and satisfaction to the target segments if the external and internal factors are formulated under the concrete marketing strategy. Destinations compete for tourists due to the recent speedy information technology system. Consumers have an abundant choice of destinations and might be infrequent visitors to the website. Therefore, DMOs should select their potential customers from the mass of tourists to avoid missing opportunities to reach the markets.

Potential customers require support and information before and during travel.

Consumers look first for the destination website. If the website is not easy to access, does not work efficiently, is not well-structured or not detailed on occasion, they will leave the website or go to another information source.

Normally, the destination website is a comprehensive bundle of available service products of the place. It doesn't suggest a specific product but should represent the entire itinerary providing comprehensive lists and contacts of any types of service providers in the destination. Information from DMOs should be reliable, accurate and timely to support a consumer's decision at low risk, which will give the right impression of being professional and exceptional on the website. Content management on the website is crucial in the tourism information system.

Websites are not the only marketing platform used by marketers. Building a user-oriented forum on the website is an attractive intersection where site visitors can find extra information, exchange opinions or build community with a common interest across the website, where the marketer can get feedback from consumers. Consumers are more demanding but more interactive. Community building on social forums and blogs adds dialogue movement to the website.

Every website has to be benchmarked against competitors regularly to reinforce marketing strategy or IT trends and to make improvements accordingly in content, functionality, and technical features. Internet transactions which accept online bookings of accommodations and priority listing in major search engines are crucial for further technical improvement. The checklist in this study can be modified for use as a self-assessment tool for Hokkaido. However, it must be noted that information is time sensitive, also the patterns of consumer behaviour and IT development are continuously changing but they all have different life cycles respectively.

Destinations have tangible and intangible values, attractions, services for tourists and local community. All of which develop the destination image and products. Attractions and activities are important local suppliers to the destination, as well as amenity products such as accommodation, restaurants, entertainments, and packages by travel agencies or operators. DMOs need to do industry benchmarks and bundle their supply side under the umbrella of destination branding where local suppliers, local partners and stakeholders can be a part of it. Extending partnerships to national competitors such as Tokyo or Osaka would supplement the insufficiency of Hokkaido which would benefit all by enlarging their global market reach through such an alliance. Thus, comprehensive marketing and promotional activities toward the right markets would also be assisted.

Increasing customers' satisfaction level in service quality and the transportation system is crucial to Hokkaido. The establishment of incoming agencies in the Hokkaido region secures provisions of supply chains on tourism products where local companies, tour operators and other stakeholders can afford to add value and these are transformed into products to customers. In order to increase casual mobility to tourists, development of transportation comfort is their first consideration. Local transportation companies and operators could collaborate beyond the operation limits in cooperation with local governments to offer beneficial programs to visitors to Hokkaido. Each organization operates within an economic system, which can be represented as a series of value chains running in parallel and supporting each economic sector (Buhalis, 2003, P38).

It would provide other business opportunities for cross selling. Infrastructure could be facilitated by government leadership and investment.

Some external factors also need to be considered. Hokkaido is rich in natural and cultural resources which gives visitor's experience a certain authenticity. Renowned natural assets such as UNESCO heritage, national parks, hot springs and other natural scenic sights need to be preserved as treasures of Hokkaido. Therefore, tourism organizations should not address mass tourism but collaborate with local stakeholders to preserve the quality level of Hokkaido tourism.

Tourism generates business opportunities for the local community. In response to a declining birth rate, increasing aging ratio, and economic development in neighbouring Asian countries, tourism could contribute more to Hokkaido's economy and its regional

revitalization. Human resources management and educational programs to increase knowledge and upgrade the ability of tourism personnel to an international level would enhance the experience level of visitors and increase customers' satisfaction level as well.

This study confirms the growing importance of e-tourism management, identifying some external and internal factors and weaknesses of the website where Hokkaido needs to improve their low performances, and shows the extent of the challenge which Hokkaido faces currently. Change will happen in Hokkaido in the near future if these factors are engaged with a dynamic and comprehensive marketing strategy and move forward correspondingly. The way to strengthen global competence of Hokkaido tourism is fairly complex. However, the Hokkaido Government and the Hokkaido Tourism Organization are the only initiative organizations that can demonstrate long-term vision and commitment, maximize the efficiency and effectiveness of the destination, capitalize market opportunities, formulate value chains and maximize consumer benefits.

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Appendix 1: Hokkaido Bednights Report 2008-2009 by Month

	FY2009		FY2008	
	Overall	thereof Foreign	Overall	thereof Foreign
Apr	1,537,000	83,790	1,666,600	95,412
May	2,503,100	97,168	2,640,500	156,220
Jun	2,678,500	83,334	3,055,500	168,130
Jul	3,367,500	189,324	3,673,100	286,318
Aug	4,107,000	193,470	4,324,700	232,383
Sep	3,398,700	98,388	3,307,000	142,848
Oct	2,750,700	144,290	2,924,400	163,472
Nov	1,973,200	110,700	1,998,600	97,979
Dec	2,030,900	273,068	2,119,700	221,716
Jan	2,136,700	229,931	2,194,600	256,798
Feb	2,317,600	343,797	2,189,400	178,369
Mar	2,120,800	132,171	2,125,900	88,664
Total	30,921,700	1,979,431	32,220,000	2,088,309

Source: Hokkaido Government: Tourism Statistics Report.

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Appendix 2: Tourism Statistics for Austria 2009 by TourMIS

Official statistics of the Austrian National Statistical Office (Annual data)					
Accommodation: All forms of accommodation					
Destination: Austria					
Period: 2009					
Market/origin	Arrivals		Bednights		Duration of stay
	absolute	% p.y.	absolute	% p.y.	
Total foreign and domestic	32,316,775	-0.9	124,307,317	-1.9	3.8
Total foreign	21,355,439	-2.6	89,864,164	-3.2	4.2
therefrom EU countries	17,616,294	-1.8	78,718,650	-3.0	4.5
Austria	10,961,336	2.6	34,443,153	1.7	3.1
Austria without Vienna	8,578,828	4.1	26,216,277	3.4	3.1
Burgenland	385,460	8.8	1,226,521	9.4	3.2
Carinthia	685,794	4.1	2,006,342	5.6	2.9
Lower Austria	2,057,021	5.2	7,136,801	3.3	3.5
Salzburg	844,874	1.2	2,258,477	0.1	2.7
Styria	1,544,739	5.7	4,732,315	3.8	3.1
Tirol	776,029	4.2	2,122,454	4.0	2.7
Upper Austria	1,929,483	2.2	5,727,090	2.6	3.0
Vienna	2,382,508	-2.2	8,226,876	-3.5	3.5
Vorarlberg	355,428	2.7	1,006,277	2.4	2.8
Germany	10,622,835	-0.8	48,856,862	-2.6	4.6
Baden Württemberg	1,674,849	1.3	6,878,602	0.3	4.1
Bavaria	3,120,629	1.6	10,588,652	-0.3	3.4
Berlin	356,726	1.0	1,737,728	-0.5	4.9
Central Germany	1,708,839	0.3	8,505,598	-1.0	5.0
East Germany	1,189,100	-2.5	6,444,336	-2.8	5.4
Nordrhein-Westfalen	1,603,484	-5.6	9,406,850	-7.0	5.9
North Germany	969,208	-4.0	5,295,096	-5.2	5.5
Arab countries in Asia	97,053	-4.9	331,139	-9.4	3.4
Australia	103,063	-15.0	250,998	-14.1	2.4
Belgium	461,299	-0.3	2,530,232	-1.3	5.5
Bulgaria	56,305	-5.3	145,774	-1.2	2.6
Canada	81,466	-8.4	207,190	-7.9	2.5
China	155,179	-0.6	222,225	-6.0	1.4
Croatia	109,903	-15.0	387,895	-8.7	3.5
Cyprus	8,951	-5.5	28,388	-2.4	3.2
Czech Rep.	556,073	6.4	1,955,027	9.9	3.5
Denmark	312,734	-1.8	1,501,450	-1.4	4.8
Estonia	16,551	-19.5	60,901	-18.4	3.7
Finland	79,189	7.5	279,429	8.6	3.5
Former Yugoslavia	54,602	3.0	144,902	4.1	2.7
France	478,747	1.2	1,739,002	0.3	3.6
Greece	88,208	-7.5	255,116	-10.3	2.9
Hungary	426,498	-7.8	1,499,474	-8.7	3.5
Iceland	6,198	-29.5	23,427	-41.6	3.8
India	47,604	1.3	96,857	-1.9	2.0
Ireland Rep	64,110	-19.8	308,291	-20.3	4.8
Israel	71,678	12.7	257,619	12.0	3.6
Italy	1,056,491	2.2	3,015,873	1.2	2.9
Japan	198,751	-4.5	407,112	-0.5	2.0
Korea Rep.	59,351	-25.7	97,859	-18.9	1.6
Latvia	15,634	-38.1	59,085	-33.3	3.8
Lithuania	23,766	-23.5	105,013	-18.0	4.4
Luxembourg	51,164	1.4	274,864	-2.1	5.4
Malta	4,086	-28.7	17,177	-25.4	4.2
Netherlands	1,654,959	0.3	9,451,747	-1.2	5.7
New Zealand	15,049	-16.7	34,491	-15.3	2.3
Norway	67,775	-8.0	240,005	-5.3	3.5
Other GUS	28,856	-1.8	89,687	-2.9	3.1
Poland	317,222	-5.3	1,385,970	-0.2	4.4
Portugal	30,082	-4.5	90,141	5.5	3.0
Romania	273,225	-13.6	841,457	-6.4	3.1
Russia	230,598	-12.7	969,166	-12.4	4.2
Slovakia	123,164	5.1	424,182	9.1	3.4
Slovenia	102,126	0.2	310,055	1.2	3.0

South Africa Rep.	15,699	-19.2	66,412	-21.2	4.2	
South East Asia	43,269	-6.5	84,200	-4.5	1.9	
Spain	249,384	-12.0	616,697	-13.2	2.5	
Sweden	171,774	-20.2	689,808	-18.5	4.0	
Switzerland	994,589	3.6	3,641,860	2.2	3.7	
Taiwan	32,354	3.1	57,620	15.1	1.8	
Turkey	39,331	-7.6	106,367	-6.8	2.7	
Ukraine	63,929	8.4	209,856	3.1	3.3	
United Kingdom	701,247	-15.0	3,263,866	-16.7	4.7	
United States	441,848	-8.6	1,110,458	-7.4	2.5	
Other African markets	23,095	12.4	64,001	1.1	2.8	
Central- and Southamerica	93,416	-6.7	213,758	-2.4	2.3	
Other Asian markets	38,187	-14.0	89,851	-10.5	2.4	
Other foreign markets	296,772	-20.8	753,328	-17.3	2.5	
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Table: SA-J1						
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Generated between 2010-05-10 (18-58-25) and 2010-05-10 (18-58-25).
(c) ÖW/ITF (<http://www.tourmis.info>)

Appendix 3: Tourism Statistics for Vienna 2009 by TourMIS

Official statistics of the Austrian National Statistical Office (Annual data)					
Accommodation: All forms of accommodation					
Destination: Vienna					
Period: 2009					
Market/origin	Arrivals		Bednights		Duration of stay
	absolute	% p.y.	absolute	% p.y.	
Total foreign and domestic	4,385,529	-4.5	9,842,827	-3.8	2.2
Total foreign	3,349,738	-5.2	7,872,526	-4.4	2.4
therefrom EU countries	1,981,791	-4.8	4,717,150	-4.1	2.4
Austria	1,035,791	-2.4	1,970,301	-1.6	1.9
Austria without Vienna	985,036	0.4	1,864,792	1.3	1.9
Burgenland	48,298	4.9	90,120	1.0	1.9
Carinthia	124,547	-3.6	242,517	-1.6	1.9
Lower Austria	83,329	4.7	153,938	5.3	1.8
Salzburg	146,803	2.4	276,038	2.9	1.9
Styria	181,158	2.9	338,222	3.0	1.9
Tirol	130,736	-0.9	252,487	1.8	1.9
Upper Austria	207,593	-2.1	383,878	-1.3	1.8
Vienna	50,755	-36.9	105,509	-34.4	2.1
Vorarlberg	62,572	0.1	127,592	1.8	2.0
Germany	855,711	-3.7	2,076,866	-1.6	2.4
Baden Württemberg	100,962	-2.8	247,218	0.1	2.4
Bavaria	223,063	-7.5	508,419	-6.3	2.3
Berlin	72,549	5.3	172,757	5.9	2.4
Central Germany	123,931	-3.6	305,555	-0.9	2.5
East Germany	76,224	4.5	190,247	7.3	2.5
Nordrhein-Westfalen	147,485	-4.5	373,049	-2.2	2.5
North Germany	111,497	-6.4	279,621	-3.8	2.5
Arab countries in Asia	52,625	5.4	133,127	-2.8	2.5
Australia	44,335	-10.0	106,945	-8.7	2.4
Belgium	37,776	-5.8	91,804	-3.3	2.4
Bulgaria	27,155	-6.5	60,144	-4.6	2.2
Canada	38,413	-5.0	98,228	-4.9	2.6
China	50,629	22.2	84,250	15.5	1.7
Croatia	27,379	-29.3	53,188	-21.3	1.9
Cyprus	5,321	-10.0	14,059	-9.3	2.6
Czech Rep.	58,877	-2.2	98,735	-1.5	1.7
Denmark	21,600	1.1	59,641	-0.6	2.8
Estonia	3,941	-30.0	9,348	-23.9	2.4
Finland	28,693	2.8	78,663	6.1	2.7
Former Yugoslavia	27,711	10.2	58,001	7.7	2.1
France	115,362	-0.5	284,871	-0.3	2.5
Greece	48,768	4.5	125,205	5.6	2.6
Hungary	59,242	-1.9	103,718	-4.1	1.8
Iceland	2,109	32.4	5,104	27.5	2.4
India	13,924	-12.0	36,045	1.7	2.6
Ireland Rep	15,119	-19.5	37,408	-21.0	2.5
Israel	25,431	32.2	64,219	29.5	2.5
Italy	221,616	-1.5	560,469	-2.7	2.5
Japan	123,009	2.6	267,749	7.7	2.2
Korea Rep.	25,907	-6.1	52,010	2.5	2.0
Latvia	4,688	-23.0	9,706	-24.3	2.1
Lithuania	3,993	-24.7	8,835	-29.8	2.2
Luxembourg	6,124	-7.6	15,590	-6.2	2.5
Malta	1,340	-37.7	4,448	-33.6	3.3
Netherlands	72,570	-9.0	187,430	-9.5	2.6
New Zealand	5,244	-9.2	12,732	-7.9	2.4
Norway	17,245	11.8	44,788	17.4	2.6
Other GUS	16,810	2.1	42,084	-13.2	2.5
Poland	48,882	-10.1	94,125	-11.1	1.9
Portugal	15,500	-3.6	39,274	-0.4	2.5
Romania	126,463	-13.9	272,446	-13.1	2.2
Russia	107,009	-8.7	283,809	-11.6	2.7
Slovakia	14,935	-7.4	29,031	-9.7	1.9
Slovenia	21,691	5.0	38,351	6.3	1.8

South Africa Rep.		4,953		-16.3		13,633		-18.9		2.8	
South East Asia		19,381		13.7		38,624		11.7		2.0	
Spain		127,091		-15.1		308,079		-15.4		2.4	
Sweden		34,445		-1.0		82,864		-0.7		2.4	
Switzerland		121,236		-4.2		284,148		-6.6		2.3	
Taiwan		15,473		15.9		32,185		36.2		2.1	
Turkey		26,260		-4.4		58,756		-4.7		2.2	
Ukraine		26,641		-2.5		54,503		-7.7		2.0	
United Kingdom		158,506		-8.9		358,630		-10.4		2.3	
United States		207,937		-4.1		507,905		-2.0		2.4	
Other African markets		14,017		14.4		37,122		13.5		2.6	
Central- and Southamerica		50,897		-2.9		123,808		1.9		2.4	
Other Asian markets		17,568		-10.6		47,102		-5.5		2.7	
Other foreign markets		132,186		-23.1		282,721		-19.1		2.1	
+-----+-----+-----+-----+-----+-----+-----+-----+-----+-----+-----+-----+											
Table: SA-J1											
+-----+-----+-----+-----+-----+-----+-----+-----+-----+-----+-----+-----+											

Generated between 2010-05-15 (21-49-01) and 2010-05-15 (21-49-01).
(c) ÖW/ITF (<http://www.tourmis.info>)

Appendix 4: Checklist Scorecards of Website Evaluation

	HTO	ANTO
1. Objective (45)	21 46.7%	29 64.4%
Authority:		
Who develop the site?	HTO	ANTO
Is it different from the webmaster?	HTO	ANTO
“About us” is available?	2	2
Can we contact the author or webmaster?	2	5
What is the URL domain (gv, or, edu, ac, com, info, net.....)?	.jp	.info
Do their credentials allow them to speak about the subject with authority?	3	3
5x3Total 15	7 46.7%	10 66.7%
Accuracy:		
When was the website produced?	?	?
Frequency of updating information. When updated recently? How often updated?	?	?
5x2Total 10	0 0%	0 0%
Purpose:		
The purpose of the site (what for, to whom) is clear.	5	5
Easy to understand what for is the site by taking a glance of top page.	3	5
Users can expect the value of travel, what they can do in the destination on top page.	3	4
The website inspire the holidays in the destination?	3	5
5x4Total20	14 70.0%	19 95.0%
2. User friendliness (50)	30 60.0%	37 74.0%
Web mobility(ease of use):		
HOME button on all pages	5	3
Site map or index availability	1	3
Multi language availability And how many languages?	3	5
Search function	3	3

Clear and easy navigation on each page	5		4	
5x5Total 25	17	68.0%	18	72.0%
Ease of contact:				
Direct email	1		4	
Address, Tel, Fax	5		4	
Call centre	1		5	
FAQ	3		1	
URL is easy to remember	3		5	
5x5Total 25	13	52.0%	19	76.0%
3. Site attractiveness (60)	48	80.0%	55	91.7%
Web interface:				
Text clear and easy to read	3		5	
Pages clean, organized	4		5	
Page design is attractive and simple (effective use of web page space)	3		5	
Not too long scrolling pages	3		5	
Limited horizontal scrolling in design (Zoning design)	5		5	
Limited vertical scrolling in design (Zoning design)	5		5	
Background is subdued	5		4	
Advertisements or flash animations do not distract user's attention away	5		4	
Pictures and images are impressive and good quality	4		5	
5x9Total 45	37	82.2%	43	95.6%
Visual entertainments:				
Virtual entertainment (movies, Youtube, tours, etc)	4		5	
Testimonials, awards	2		4	
Photo gallery	5		3	
5x3Total15	11	73.3%	12	80.0%
4. Market effectiveness (130)	76	58.5%	114	87.7%
Market information:				
Current and timely information? Trend- and season related?	2		5	
Information on hotels, restaurants, events, shopping is covered?	4		3	
News release	1		3	

5x3Total 15	7 46.7%	11 73%
Consistency:		
Logo reflected on all pages	2	5
The website displays originality in common design	4	5
Corporate design in any page, in any language	2	5
5x3Total 15	8 53.3%	15 100.0%
Market segments:		
Leisure	1	1
Business		
Family, children		1
Couple		1
Special interests groups(disability, meetings)		2
B2B (tourism industry)	1	1
Press, journalists		1
1x8Total 8	2 25.0%	7 87.5%
Destination attributes:		
Culture		1
Nature	1	1
Art		1
Recreation	1	1
Sports	1	1
Food	1	1
People		1
Product sources are classified into appropriate groups or topics by understandable words? How many groups?	3	5
Is it possible to compare (service, price, etc) within the group?	4	4
Are the headline Indexes representing main attributes of the destination?	4	4
Are these relevant to help user's research?		
Is there a bias in the presentation of info?	3	5
7+ (5x4) Total27	18 66.7%	25 92.6%
Advertisements:		
The website provides accurate information with limited advertisements.	5	5
Are the advertisements related to the tourism and supplement to the web?	3	5

5x2Total 10	8 80.0%	10 100.0%
Trip planner:		
General travel information (Visa, currency, etc)	4	3
Local weather information	4	2
Help, Search function	3	5
Map	3	5
Transportation mode and schedule	3	5
Event calendar	3	4
Hotel, accommodation	3	4
Availability of Online booking	1	5
Availability of Digital brochures	5	4
5x9 Total 45	29 64.4%	37 82.2%
Community building:		
Newsletter subscription	1	4
Facebook, Twitter, Tripadvisor, etc	3	5
5x2Total 10	4 40.0%	9 90.0%
5. Technical features (50)	32 64.0%	40 80.0%
Net Mechanic and Listing:		
HTML	4	5
Loading time	1	4
Compatible browser	1	2
Correct word spelling, grammar?	3	3
Are the links (if any) functional?	5	5
Priority listing in major search engines	2	5
5x6 Total 30	16 53.3%	24 80.0%
Regal compliance:		
The Copyright is shown clearly	5	5
Site contents usage policy	3	5
Privacy policy	5	5
Security	3	1
5x4Total20	16 80.0%	16 80.0%
Grand Total (335)	207 61.8%	275 82.1%

Appendix 5: Questionnaire for Website Evaluation

This questionnaire is conducted in order to understand how satisfied the users with the destination websites of Austria and Hokkaido, Japan. Before answering to the questionnaire, kindly try to search the following 2 websites in English language:

- 1) Official destination website of Hokkaido in Japan (H)
- 2) Official destination website of Austria (A)

The correct URLs are:

- 1) Hokkaido Tourism Organization [http:// en.visit-hokkaido.jp](http://en.visit-hokkaido.jp)
- 2) Austrian National Tourist Office <http://www.austria.info/uk>

Your help in answering this questionnaire and returning promptly is very much appreciated. Thank you.

Akiko Tanaka

A: Objective

A1) The purpose of the website is clear? Easy to understand what for, to whom at the 1st look of top page?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

A2) Could you expect value of the travel and what you can experience in the destination?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

A3) Are you inspired the holidays in the destination during a short surfing of the website?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

A4) Will you come back to this site or recommend it to your friends?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

A5) Could you find who develop this site and who are they?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

B. User Friendliness

B1) Navigation bar was present in every page and helpful and well-organized?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

B2) Do the format, design and layout complement your use of the site?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

B3) Overall user friendly site?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

B4) Search functions in the website assisted quick and correct information?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

B5) The URL is easy to remember?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

C. Site Attractiveness

C1) Is the text clear and easy to read?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

C2) Is the page clean, organized and uncluttered?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

C3) Are you informed price level by the given information?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

C4) Is the given information clear, relevant and appropriate to your research question(s)?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

C5) Which content was the most interesting for your research?

H	<input type="checkbox"/> About Hokkaido	<input type="checkbox"/> Travel Planner	<input type="checkbox"/> Access
	<input type="checkbox"/> Events	<input type="checkbox"/> Activities	<input type="checkbox"/> Food
	<input type="checkbox"/> Hot spring	<input type="checkbox"/> Accommodation	<input type="checkbox"/> Others()

A	<input type="checkbox"/> Discover	<input type="checkbox"/> Planning	<input type="checkbox"/> Search & Book
	<input type="checkbox"/> Essentials	<input type="checkbox"/> Others ()	

C6) Did the site motivate you to travel there alone or in a small group?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

C7) Use of colours improves visual appearance and impression?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

C8) Graphics (photos, images) are appropriate and supplement to text?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

C9) Did graphics (photos, images) motivate you to travel there?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

D. Market Effectiveness

D1) Every page has common outlook and displayed originality?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

D2) Up to date travel information?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

D3) Could you find any package information?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

D4) Could you find events?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

D5) Could you find accommodations?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

D6) Could you find interesting attractions?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

D7) Products and services are listed well and thorough?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

D8) Very informative content of destination features?

H	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

E. Technical features

E1) Could you find the website easily in searching process?

H		<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure
A		<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not sure

F. Demography

F1) Gender

	<input type="checkbox"/> Male	<input type="checkbox"/> Female
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F2) Age

	<input type="checkbox"/> 20-30s	<input type="checkbox"/> 31-40s
	<input type="checkbox"/> 41-50s	<input type="checkbox"/> Over 51

F3) Marital status

	<input type="checkbox"/> Single	<input type="checkbox"/> Married
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F4) Have you ever been to Japan/Austria?

Japan		<input type="checkbox"/> Yes	<input type="checkbox"/> No
Austria		<input type="checkbox"/> Yes	<input type="checkbox"/> No

Appendix 6: Questionnaire Results

A1	<i>The purpose of the website is clear? Easy to understand what for, to whom at the 1st look of top page?</i>	Hokkaido		Austria	
Yes		6	75.0%	8	100.0%
No		0	0.0%	0	0.0%
Not sure		2	25.0%	0	0.0%
CONTROL		8	100%	8	100%

A2	<i>Can you expect the value of the travel and what you can experience in the destination?</i>	H		A	
Yes		4	50.0%	8	100.0%
No		0	0.0%	0	0.0%
Not sure		4	50.0%	0	0.0%
CONTROL		8	100%	8	100%

A3	<i>Are you inspired the holidays in the destination during a short sufring of the website?</i>	H		A	
Yes		8	100.0%	8	100.0%
No		0	0.0%	0	0.0%
Not sure		0	0.0%	0	0.0%
CONTROL		8	100%	8	100%

A4	<i>Will you come back to this site or recommend it to your friends?</i>	H		A	
Yes		4	50.0%	8	100.0%
No		0	0.0%	0	0.0%
Not sure		4	50.0%	0	0.0%
CONTROL		8	100%	8	100%

A5	<i>Could you find who develop this site, who are they?</i>	H		A	
Yes		1	12.5%	8	100.0%
No		2	25.0%	0	0.0%
Not sure		5	62.5%	0	0.0%
CONTROL		8	100%	8	100%

B1	<i>Navigation bar was present in every page and helpful and well-organized?</i>	Hokkaido		Austria	
Yes		7	87.5%	8	100.0%
No		0	0.0%	0	0.0%
Not sure		1	12.5%	0	0.0%
CONTROL		8	100%	8	100%

B2	<i>Do the format, design and layout complement your use of the site?</i>	H		A	
Yes		5	62.5%	8	100.0%
No		0	0.0%	0	0.0%
Not sure		3	37.5%	0	0.0%
CONTROL		8	100%	8	100%

B3	<i>Overall user friendly site?</i>	H		A	
Yes		7	87.5%	8	100.0%
No		0	0.0%	0	0.0%
Not sure		1	12.5%	0	0.0%
CONTROL		8	100%	8	100%

B4	<i>Search function in the website assisted quick and correct information?</i>	H		A	
Yes		0	0.0%	7	87.5%
No		8	100.0%	1	12.5%
Not sure		0	0.0%	0	0.0%
CONTROL		8	100%	8	100%

B5	<i>The URL is easy to remember?</i>	H		A	
Yes		4	50.0%	8	100.0%
No		4	50.0%	0	0.0%
Not sure		0	0.0%	0	0.0%
CONTROL		8	100%	8	100%

C1	<i>Is the text clear and easy to read?</i>	Hokkaido		Austria	
Yes		1	12.5%	7	87.5%
No		5	62.5%	0	0.0%
Not sure		2	25.0%	1	12.5%
CONTROL		8	100%	8	100%

C2	<i>Is the page clean, organized and uncluttered?</i>	H		A	
Yes		3	37.5%	8	100.0%
No		0	0.0%	0	0.0%
Not sure		5	62.5%	0	0.0%
CONTROL		8	100%	8	100%

C3	<i>Are you informed price level by the given information?</i>	H		A	
Yes		0	0.0%	1	12.5%
No		6	75.0%	2	25.0%
Not sure		2	25.0%	5	62.5%
CONTROL		8	100%	8	100%

C4	<i>Is the given information clear, relevant and appropriate to your research questions?</i>	H		A	
Yes		0	0.0%	6	75.0%
No		3	37.5%	0	0.0%
Not sure		5	62.5%	2	25.0%
CONTROL		8	100%	8	100%

C5	<i>Which content is the most interesting for your research?</i>	H		A	
About Hokkaido		3	37.5%		
Activities		5	62.5%		
Travel Planner		0	0.0%		
Access		0			
Events		0			
Discover				1	12.5%
Planning				6	75.0%
Search and Book				0	0.0%
Essentials				1	12.5%
CONTROL		8	100%	8	100%

C6	<i>Did the site motivate you to travel there alone or in a small group?</i>	H		A	
Yes		0	0.0%	5	62.5%
No		2	25.0%	0	0.0%

Not sure	6	75.0%	3	37.5%
CONTROL		8	100%	8

C7	<i>Use of colours improves visual appearance and impression?</i>	H		A	
Yes	7	87.5%	7	87.5%	87.5%
No	0	0.0%	0	0.0%	0.0%
Not sure	1	12.5%	1	12.5%	12.5%
CONTROL		8	100%	8	100%

C8	<i>Graphics(photos, images) are appropriate and supplement to text?</i>	H		A	
Yes	7	87.5%	7	87.5%	87.5%
No	0	0.0%	0	0.0%	0.0%
Not sure	1	12.5%	1	12.5%	12.5%
CONTROL		8	100%	8	100%

C9	<i>Did graphics(photos, images) motivate you to travel there?</i>	H		A	
Yes	8	100.0%	8	100.0%	100.0%
No	0	0.0%	0	0.0%	0.0%
Not sure	0	0.0%	0	0.0%	0.0%
CONTROL		8	100%	8	100%

D1	<i>Every page has common outlook and display originality?</i>	Portion		Portion	
Yes		5	62.5%	8	100.0%
No		0	0.0%	0	0.0%
Not sure		3	37.5%	0	0.0%
CONTROL		8	100%	8	100%

D2	<i>Up to date travel information?</i>	Portion		Portion	
Yes		2	25.0%	6	75.0%
No		0	0.0%	0	0.0%
Not sure		6	75.0%	2	25.0%
CONTROL		8	100%	8	100%

D3	<i>Could you find any package information?</i>	Portion		Portion	
Yes		0	0.0%	7	87.5%
No		8	100.0%	0	0.0%
Not sure		0	0.0%	1	12.5%
CONTROL		8	100%	8	100%

D4	<i>Could you find events?</i>	Portion		Portion	
Yes		0	0.0%	8	100.0%
No		0	0.0%	0	0.0%
Not sure		8	100.0%	0	0.0%
CONTROL		8	100%	8	100%

D5	<i>Could you find accommodations?</i>	Portion		Portion	
Yes		8	100.0%	8	100.0%
No		0	0.0%	0	0.0%
Not sure		0	0.0%	0	0.0%
CONTROL		8	100%	8	100%

D6	<i>Could you find interesting attractions?</i>	Portion		Portion	
Yes		4	50.0%	5	62.5%
No		0	0.0%	0	0.0%
Not sure		4	50.0%	3	37.5%
CONTROL		8	100%	8	100%

D7	<i>Products and services are listed well and thorough?</i>	Portion		Portion	
Yes		0	0.0%	8	100.0%

No	4	50.0%	0	0.0%
Not sure	4	50.0%	0	0.0%
CONTROL		8	100%	8

D8	<i>Very informative content of destination features?</i>	Portion		Portion	
Yes	0	0.0%	5	62.5%	
No	3	37.5%	0	0.0%	
Not sure	5	62.5%	3	37.5%	
CONTROL		8	100%	8	100%

E1	<i>Could you find the website easily in searching process?</i>	H		A	
Yes	4	50.0%	6	75.0%	
No	4	50.0%	2	25.0%	
Not sure	0	0.0%	0	0.0%	
CONTROL		8	100%	8	100%

F1	<i>Gender</i>	Portion	
Male	5	62.5%	
Female	3	37.5%	
CONTROL		8	100%

F2	<i>Age</i>	Portion	
20 - 30s	2	25.0%	
31 - 40s	1	12.5%	
41 - 50s	3	37.5%	
Over 51	2	25.0%	
CONTROL		8	100%

F3	<i>Marital Status</i>	Portion	
Married	5	62.5%	
Single	3	37.5%	
CONTROL		8	100%

F4	<i>Have you ever been to Japan?</i>	Portion	
Yes	6	75.0%	
No	2	25.0%	
CONTROL		8	100%

F5	<i>Have you ever been to Austria?</i>	Portion	
Yes		7	87.5%
No		1	12.5%
CONTROL		8	100%

Appendix 7: Performance Level of Questionnaire Results

Elements (Full scores)	No. of Questions	HTO	Value%	ANTO	Value%
Objective (120)	5	69	58%	120	100%
User Friendliness (120)	5	69	58%	117	98%
Site Attractiveness (192)	8	78	41%	147	77%
Market Effectiveness (192)	8	57	30%	165	86%
Technical Features (24)	1	12	50%	18	75%
Overall (648)	27	285	44%	567	88%

No = 1 point, Not sure = 2, Yes = 3

N=8

Appendix 8: Questionnaire Results by Sample

#	A-Objective					B-User Friendliness					C-Site Attractiveness					D-Market Effectiveness								E-Technical	F-General Demography								
	A1	A2	A3	A4	A5	B1	B2	B3	B4	B5	C1	C2	C3	C4	C5	C6	C7	C8	C9	D1	D2	D3	D4	D5	D6	D7	D8	E1	F1	F2	F3	F4	
Hokkaido	1	3	3	3	3	2	3	3	3	1	1	1	2	1	1	activities	1	3	3	3	2	2	1	2	3	2	2	2	1	F	41-50s	single	3
	2	3	2	3	3	2	3	3	3	1	1	1	2	2	1	activities	1	3	3	3	3	3	1	2	3	3	1	2	1	F	Over 51	married	1
	3	3	2	3	2	2	2	2	2	1	1	1	3	1	2	about	2	3	3	3	2	2	1	2	3	3	2	2	3	F	Over 51	married	3
	4	3	2	3	2	3	3	3	3	1	3	1	3	1	1	activities	2	3	3	3	3	2	1	2	3	3	1	1	3	M	20-30s	single	1
	5	3	3	3	3	2	3	3	3	1	3	2	2	1	2	about	2	3	3	3	3	2	1	2	3	3	1	1	3	F	20-30s	single	3
	6	3	2	3	2	2	3	2	3	1	3	1	2	1	2	activities	2	3	3	3	3	2	1	2	3	2	1	1	1	M	41-50s	single	3
	7	2	3	3	3	1	3	3	3	1	3	2	3	1	2	activities	2	3	3	3	2	2	1	2	3	2	2	2	1	F	31-40s	single	3
	8	2	3	3	2	1	3	2	3	1	1	3	2	2	2	about	2	2	2	3	3	3	1	2	3	2	2	2	3	M	41-50s	married	3
Average	2,75	2,5	3	2,5	1,9	2,875	2,63	2,875	1	2	1,5	2,4	1,25	1,6		1,8	2,9	2,88	3	2,6	2,25	1	2	3	2,5	1,5	1,625	2					
Austria	1	3	3	3	3	3	3	3	3	3	3	3	2	2	planning	3	3	3	3	3	2	3	3	3	2	3	2	3	F	41-50s	single	1	
	2	3	3	3	3	3	3	3	3	3	3	3	2	2	planning	2	3	3	3	3	3	3	3	3	3	3	3	1	F	Over 51	married	3	
	3	3	3	3	3	3	3	3	3	3	3	3	2	3	planning	2	3	3	3	3	2	2	3	3	2	3	2	3	F	Over 51	married	3	
	4	3	3	3	3	3	3	3	3	3	3	3	2	3	Essentials	3	3	3	3	3	3	3	3	3	3	3	3	3	M	20-30s	single	3	
	5	3	3	3	3	3	3	3	3	3	3	3	3	1	3	planning	3	3	3	3	3	3	3	3	3	3	3	3	3	F	20-30s	single	3
	6	3	3	3	3	3	3	3	3	3	3	3	3	1	3	planning	2	3	3	3	3	3	3	3	3	2	3	2	3	M	41-50s	single	3
	7	3	3	3	3	3	3	3	3	3	3	3	3	2	3	planning	3	3	3	3	3	3	3	3	3	3	3	3	3	F	31-40s	single	3
	8	3	3	3	3	3	3	3	3	1	3	2	3	3	3	discover	yes	2	2	3	3	3	3	3	3	3	3	3	1	M	41-50s	married	3
Average	3	3	3	3	3	3	3	3	2,75	3	2,9	3	1,88	2,8		2,6	2,9	2,88	3	3	2,75	2,9	3	3	2,63	3	2,625	2,5					

Note: 1=No, 2=Not Sure, 3= Yes

N=8