

CHANGING DEMOGRAPHICS IN JAPAN'S NATIONAL PARKS; TOWARDS A TARGETED MARKETING STRATEGY FOR NATURE-BASED TOURISTS

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Review

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Abstract

Trends from Japan and other post-industrial countries suggest visitor demand for nature-based tourism (NBT) destinations such as national parks, which rocketed in the post-war period, has peaked and is now in decline. This has adverse implications for funding and natural resource management. One suggested counter strategy is targeted marketing based on commercial techniques, but this relies on accurate knowledge of the market to maintain current segments and attract new ones. This paper employs a 'market leader' case study approach to investigate visitors to Kamikochi, a gateway to the North Japan Alps whose long conservation pedigree, and proximity to urban areas, ensures it can fulfil both 'protection' and 'promotion' criteria. The focus was on the Day Hiker (Dh) segment of visitor demand, deemed desirable from a managerial perspective, because they were shown to stay longer, visit more frequently and have a greater interaction with nature. The aims were to identify the composition of Kamikochi's Dh visitor segment, and cross analyse the results to provide practical information for national park managers. Following on from a 2007 survey, 391 usable semi-structured questionnaires were collected between July 10th and September 10th 2009, from participants in guided tours at Kamikochi, a response rate of 31%. Results show the 'market leader' segment consisted of pairs or small groups of well-educated, wealthy 'baby-boomers' from Kanto; 55% were aged 50 or over, and 59% came from the greater Tokyo metropolitan area. These Kanto Dhs tended to be repeat visitors (66.0%) who stayed for 2 nights or more (55.1%), thus surpassing the benchmark set by previous research. However, the results provided a snapshot of visitor demand unbalanced not only by urban area, but also gender, age and income; hence further research is needed to explain the dominance of female, elderly and wealthy visitors.

One logical explanation is that these segments are *already* being targeted by travel agencies, as suggested by the 42% who came to Kamikochi as part of a package tour. If so, then it raises the question of why marketing is being outsourced to travel agencies rather than conducted via joint campaigns that incorporate a range of stakeholders. Thus although the need for targeted marketing is clear, some significant barriers to marketing NBT resources exist, including diverse objectives, mixed land ownership and insufficient funding. Transparent goals, combined with ongoing visitor segment monitoring, are thus two vital steps towards a targeted NBT marketing strategy.

Keywords Kamikochi, Japan, national park, nature-based tourism, visitor typology, marketing

INTRODUCTION

It has become almost a cliché to note that visitor demand for global nature-based tourism (NBT) destinations such as national parks has rocketed in recent decades. One theory suggests urbanization has driven demand, with swelling populations of affluent urbanites triggering a reciprocal desire to 'return to nature,' symbolised by remote, non-urban destinations (Graburn, 1989). Yet conclusive evidence has remained elusive, and in the meantime, visitor numbers appear to have peaked and are now in a state of decline in many developed countries such as the USA, Spain and Japan (Pergams&Zaradic, 2008). Although declining visitation may offer temporary respite to specific issues such as congestion, it is a threat to natural resource management at a fundamental level since it undermines the public's willingness to provide tax support for national parks and other NBT destinations, thereby increasing their susceptibility to budgets cuts.

RESEARCH AIM

One strategy to counter declining visitation is the promotion of NBT to visitors using communication tools which appropriate commercial marketing techniques, allowing management to target more or less desirable segments, to encourage the former and discourage ('demarket' to) the latter (Beeton& Benfield, 2003). Targeted marketing is a pro-active extension of the ROS¹ planning theory whereby different 'zones' are tailored to meet the needs of different visitor segments while mitigating adverse impacts such as congestion. However, the effective channelling toward separate zones of, for example, birdwatchers and mountain bikers, relies on data from visitor monitoring.

NBT definitions, and estimates of market share, vary widely; for example, Weaver (2003) claims that around 20% of international tourism is made for the purpose of visiting parks or protected areas. Yet other estimates suggest up to 60% of all international tourism can be attributed to NBT (Wells, 1997). Given this lack of consensus on definition, and the sporadic nature of visitor monitoring, case study approaches have frequently been employed to create an empirical definition within the unique confines of a particular market. This is consistent with the business world; just as market research and marketing for Disneyland CA differ from those of Walt Disney World Resort FL, so different NBT destinations require site-specific monitoring and targeted marketing.

One such case study attempt to define the parameters of a NBT market was a 2007 survey by Jones (2009) investigating visitors to Kamikochi, in Japan's Chubu Sangaku national park. It used an on-site survey to classify three sub-segments – sightseers (Ss), day hikers (Dh) and mountain climbers (Mc) – based on the extent of their interaction with nature. This follow-up investigation will focus on the Dh segment of visitor demand, which was deemed desirable from a managerial perspective, because Dhswere shown to stay longer, visit more frequently and have a greater interaction with nature

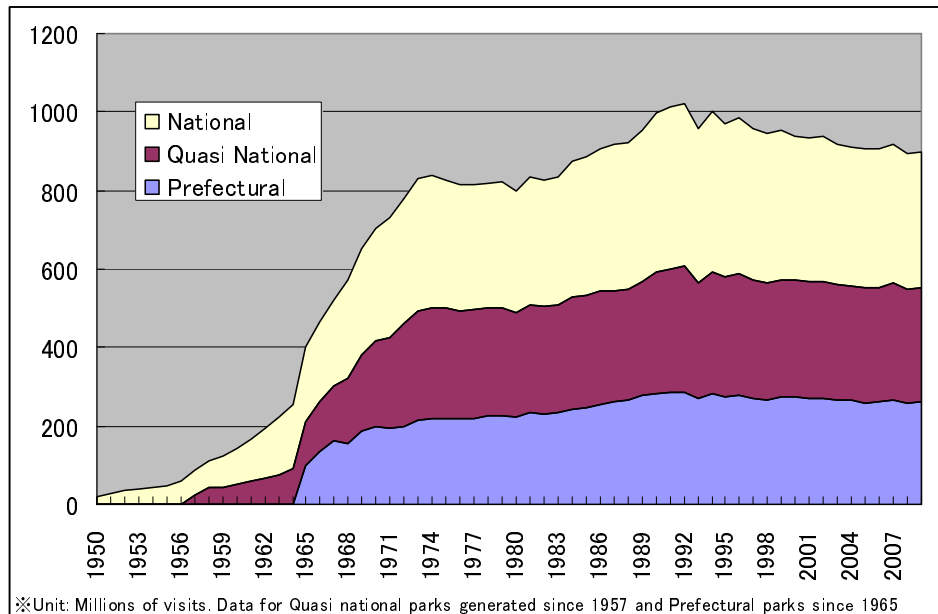
¹The Recreation Opportunity Spectrum that emerged in US national parks at the end of the 1970s (McCool, Clark, &Stankey, 2007).

(ibid). They are also one of the few growth segments in a shrinking market. The research goals of this paper are thus two-fold; firstly, to identify the composition of Kamikochi's Dh visitor segment, including detailed analysis of its socio-demographic characteristics, length of stay, types of visit, motivations and expenditures. Next is to cross analyse the results to provide practical information for national park managers, including suggestions for targeted marketing.

NBT IN JAPAN

In Japan, as in other developed countries, visitation at NBT destinations such as national parks rose steeply in the postwar period, but has since peaked and is now in a state of decline.

Fig.1: Total number of estimated annual visits to Japan's nature parks 1950-2009.²



Source: MoE, 2011

This post-war boom in NBT reflected socio-economic changes – soaring personal income and private car ownership, for example – linked to broader trends of rural depopulation and urbanization; urban land increased from 2.5% of Japan in 1965, to 3.6% in 1975 and 4.4% in 1985 (Siman, 1989). The national parks were aggressively developed in the same period as NBT hubs to meet increasing demand for ‘nature,’ a theme expounded by numerous studies such as Naito’s (2003) finding that 55% of all tourists were motivated by hot springs and 46% by natural scenery.

²Nature parks are an umbrella category comprising of national, quasi-national and prefectural parks.

However Japan's population peaked at 127.8 million in 2004 and is now in decline, and according to the urban-demand theory, visitation has dwindled in correlation with demography. Overall Japanese national park visits per capita are still among the highest in the world at 2.7 visits per person per annum (Pergams&Zaradic, 2008). But the gradual average rate of overall decline masks a growing gulf between the metropolitan areas (slight growth or decline) and rural areas (chronic decline), which has seen increasingly unevenly distributed numbers, so that in 2009 the six national parks within daytripper reach of Tokyo accounted for over half (51.9%) of all annual visits (MoE, 2011). In this way, a number of NBT 'super-destinations' have emerged to orbit the metropolitan areas, attracting overwhelmingly dense concentrations of visitor traffic at peak periods. This paper examines a market leader segment at one such destination.

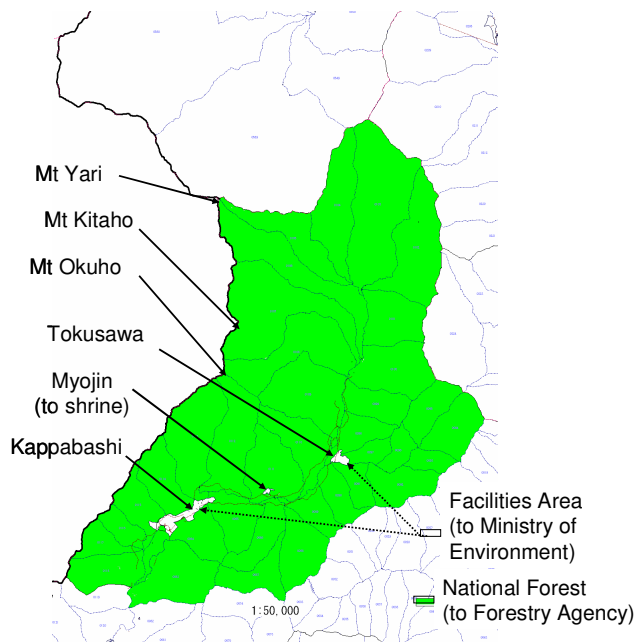
RESEARCH AREA

Kamikochi is a highland basin 1500m above sea level, the southern gateway to the Chubu Sangaku, an IUCN Category II national park better known as the North Japan Alps. Ringed by 3000m peaks, Kamikochi occupies a mixed biotic zone on the border of the subalpine threshold, and its dense forests thus provide a habitat for a variety of beech, oak, lime and white birch. The Azusa River flows through the centre of the valley, and along its flood plain grow Japanese larch and a range of willow including the characteristic Keshoyanagi (*Choseniaarbutifolia*). The valley is also home to a range of wildlife including Macaque monkeys and serow (*Capricorniscrispus*), while ptarmigans (*Lagopusmutus*) are found higher up the mountainside. Both the latter are designated Natural Cultural Properties.

In terms of land ownership, 99% of this alpine basin of 113.27km² is designated national forest, thereby falling under the jurisdiction of the Forestry Agency.³ However, the Ministry of Environment (MoE) has direct jurisdiction over 58.5ha of prime territory around the central Bus Terminal. This direct control over a relatively large and strategically important area is an unusual situation among Japan's NPs where a mere 0.2% of the total land is directly owned by the MoE, even though they are responsible for park management (Kato, 2000). Such fragmented management is not unique to Japan's national parks and has been well-documented by previous research (Baker & Cameron 2008).

³ In Japan, as in the US, the Forestry Agency forms part of Ministry of Agriculture, Forestry and Fisheries (Barrett, 2005). It also owns over 60% of national park land.

Fig. 2: Land ownership within the Kamikochi valley



Source: Forestry Agency

Kamikochi has been protected from extractive industries and excessive development by some of the strictest conservation policies anywhere in Japan. These date back to designation as the nation's first Protection Forest in 1916, and later came to be epitomized by a ban on private cars introduced from 1975 (Kikuchi, 2001). Nonetheless, Kamikochi's pristine alpine scenery has invited large-scale NBT, and the honeypot destination thus represents in microcosm many of Japan's national park management issues, including the explosion in visitor demand, that has seen a four-fold increase in visitors in the past 40 years. Its central location offers easy access from across the Japanese archipelago, especially the twin megatropolises of Kanto and Chubu.⁴

RESEARCH METHOD

In marketing terminology, a market leader refers to a "brand, product, or firm that has the largest percentage of total sales revenue (the market share) of a market" (Longman, 2000). Yet in the case of NBT visitors, the need to instil a sense of stewardship means a market leader can be defined in a number of ways, including the amount of time spent, the number of visits or the degree of interaction with nature (Lai, Sorice, Nepal & Cheng, 2009). Kamikochi's long conservation pedigree, combined with relative proximity to urban areas, means that it can fulfil both the 'protection' and 'promotion'

⁴ The Greater Tokyo area is the centre of the Kantō plain and in 2010 had a population of some 42 million, compared with some 23.5 million in the Chubu area around Nagoya.

criteria required of a national park market leader. And as an alpine basin, geological constraints ensure that visitors are channelled along a number of pre-determined courses along the valley floor. This enabled Jones (2009) to classify three sub-segments in 2007 consisting of back and front country users (termed 'Mountain Climbers' and 'Sightseers'), and an intermediate 'Dh'⁵ segment. This latter segment was in turn deemed vital for Kamikochi's development as an NBT destination due to best fulfilling a range of management criteria such as longer stay, higher repeat rate and greater interaction with nature.

In order to implement a follow-up survey to the findings of 2007, this research therefore honed in on Dhs to identify in detail the composition of this market segment and provide practical suggestions for targeted marketing. In order to pinpoint visitors fulfilling the range of activity laid out by previous definitions of Dhs, participants in NPG⁶ guided tours originating from the centrally located Kappabashibridge were selected and a semi-structured questionnaire designed to capture their socio-demographic variables. The questionnaire was administered by NPG staff to participants in a range of five guided walks around the Kamikochi basin, each one averaging between 1-2 hours. Participants were approached at the end of the tour and asked to fill in the questionnaire on a voluntary basis after a short explanation was given. Collected data was treated with SPSS and after variables had been recorded, cross analysis was conducted and significance verified using a Chi square test.

RESULTS

During the summer peak from July 10th to September 10th 2009, 391 usable questionnaires were collected from a total of 1263 recorded participants, a response rate of 31%. Moreover, the NPG Male:Female ratio of 38%:62% was closely reflected in the questionnaire results, where some two-thirds of respondents were female, suggesting an accurate cross-section was achieved.

55% of respondents were aged 50 or above. 43% visited in pairs, and 36.3% came with their spouse or partner. 37.8% visited in small groups of 3-5 people, with 34.5% visiting with their family. Respondents were well-educated, around 60% were university graduates, and almost two-thirds (65.8%) claiming to be in a higher income bracket than the national average of around 350 million Japanese Yen.⁷ There were high proportions of company employees (34%), and housewives (20%) – the latter linked to the high participation rate of females – followed by retirees (13%) and civil servants (10%).

⁵ The Day Hiker sub-segment was not limited to day trip visitors, but was instead defined by a range of activity that extended further into the backcountry than Sightseers, but not as far as fully-blown Mountain Climbers (Jones, 2009).

⁶ National Park Guides, one of four guide organizations currently operating in the Kamikochi valley.

⁷ The 2009 annual average was 5.1 million Yen, based on a monthly disposable income of 427,912 Yen calculated as income minus non-consumption expenditure such as taxes and social insurance contributions (MIAC, 2010).

Almost 60% of visitors came from the Kanto area, with half of those from Tokyo. This is considerably more than in 2007, when 40% were from Kanto and 47% from the Chubu area. There was a high level of repeat visitors (59%), including 'heavy' repeaters (13%).

Table 1: **Socio-demographic variables of sample**

Description of survey respondents (n=391)		Percent
Gender	male	34.9%
	female	65.1%
Education level	jr. high school	2.7%
	high school	28.7%
	university	61.3%
	post-graduate	7.3%
Household income	< ¥ 3million	13.7%
	¥ 3-5million	20.5%
	¥ 5-7million	21.4%
	¥ 7-10million	17.5%
	¥ 10-15million	12.4%
	> ¥ 15million	14.5%
Occupation	company employee	34.3%
	civil servant	10.5%
	self-employed	9.3%
	housewife	20.1%
	student	3.7%
	non-salaried worker	5.4%
	unemployed*	12.7%
	other	4.0%
Area of residence	Kanto	59.4%
	Chubu	12.1%
	Kansai	15.3%
	Other	13.2%

* includes retired

Among different modes of transport, many visitors travelled as part of a package tour (42%). This is reflected in the fact that 70% of respondents decided to participate in the guided tour *before* they arrived in Kamikochi. On the Nagano Prefecture side of the Alps, many people visited the Norikura area (n=85), while on the Gifu Prefecture side, Takayama was the most frequent stop-off point (n=38).⁸ 72% of participants had no prior experience of taking such a guided tour, but of the 28% who did have prior experience, the most common destinations were Japan's three designated UNESCO natural world heritage sites; Shiretoko (n=15), Shirakami (n=11) and Yakushima (n=10).

⁸ Norikura area includes Norikura, Tatamidaira and ShirahoneOnsen (multiple answers allowed).

Table 2: **Socio-demographic variables of trip**

Description of respondents' trip (n=391)	Percent	
Number of visitors in group	1	2.1%
	2	43.0%
	3~5	37.8%
	>6	17.1%
Companion	alone	2.1%
	couples*	36.3%
	family	34.5%
	friends	17.4%
	other	9.8%
Number of visits to Kamikochi	1st time	40.7%
	2nd~4th time	46.6%
	>5th time	12.7%
Length of stay	daytrip	11.2%
	1night	41.7%
	>2night	47.1%
Type of transport mainly used	car	27.2%
	train	20.2%
	bus	5.2%
	package tour	41.5%
	other	6.0%
Previous guide experience	NPG	8.1%
	other	19.7%
	none	72.2%

* includes married couples

CROSS ANALYSIS

Having thus recorded the socio-demographic variables, the next stage was to cross analyse them, for which a three-way framework was devised - area, age and information. Statistical significance was verified using Chi square, and the results are displayed in graph form below.⁹

The first set of cross analyses sub-divided visitors based on the four areas¹⁰ of current residence. Figure 3 shows that visitors from Kanto and Chubu were notably older, with 63.5% aged 50 or over. Conversely, 59.0% of visitors from Other areas and 64.6% from Kansai were relatively younger visitors in their 20, 30s and 40s. Figure 4 shows a high proportion of visitors from Kanto (49.0%) and Chubu (46.3%) travelling as part of a

⁹ As there were more than two categories in all cases (except gender), Cramer's V was preferred to Phi.

¹⁰ The Kantō area was defined as seven prefectures; Gunma, Tochigi, Ibaraki, Saitama, Tokyo, Chiba and Kanagawa; the Chubu area was defined as eight prefectures; Aichi, Fukui, Gifu, Ishikawa, Nagano, Niigata, Shizuoka, Toyama and Yamanashi; the Kansai area was defined as seven prefectures; Mie, Nara, Wakayama, Kyoto, Osaka, Hyōgo and Shiga.

package tour, while visitors from Other areas were more likely to be travelling by car (47.7%) and Kansai by car (28.8%) or train (26.9%). As shown by Figure 5, Kanto (66.0%) and Chubu (68.3%) visitors were also more likely to be repeaters. Finally, Figure 6 shows that more visitors from Chubu stayed for 1 night (65.9%), and more from Kanto stayed for 2 nights or more (55.1%). It should also be noted that overall day trips were minimal; even Kanto, the highest comparative proportion, amounted to only 13.5%.

Fig. 3: Area crossed with age

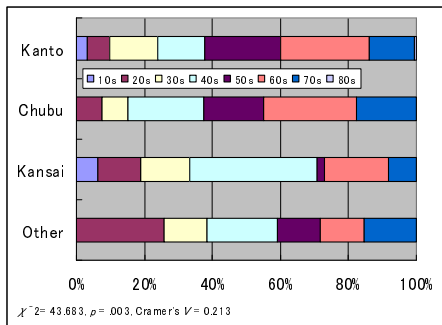


Fig. 4: Area crossed with transport

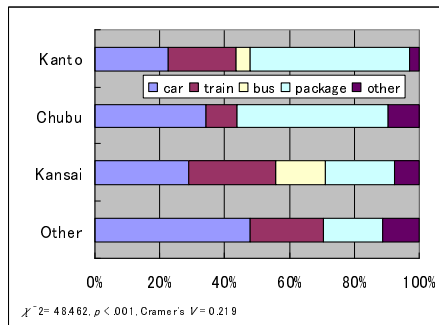
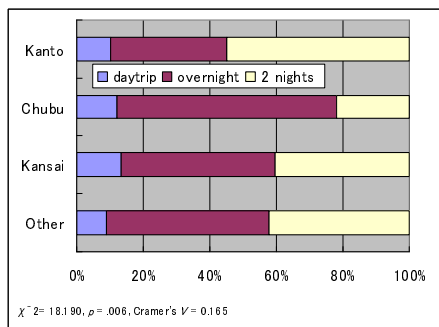
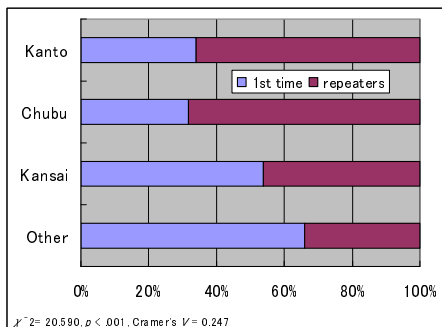


Fig. 5: Area crossed with number of visits Fig. 6: Area crossed with length of stay



The next set of cross analyses sub-divided visitors based on their age level. Firstly, Figure 7 shows how proportions of males increased in correlation with age. Meanwhile car visitors were inversely correlated with age (Figure 8), with older visitors in their 60s, 70s and 50s strongly favouring package tours. Older visitors were more likely to be repeaters (Figure 9), and they also tended to stay longer (Figure 10).

Fig. 7: Age crossed with gender

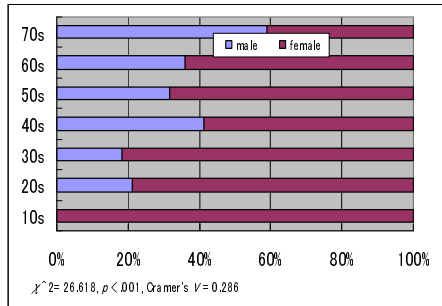


Fig. 8: Age crossed with transport

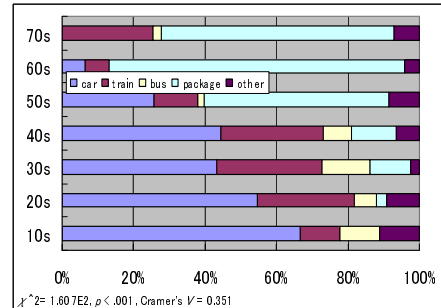
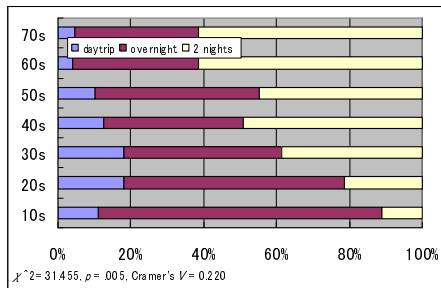
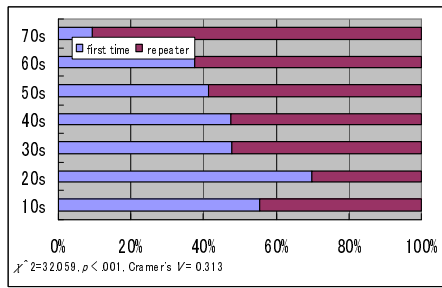


Fig. 9: Age crossed with number of visits Fig. 10: Age crossed with length of stay



The third set of cross analyses investigated the types of information used by visitors during their trip. Figures 11 and 13 show that older visitors were less likely to use either guidebooks or magazines, or the internet. This may be connected with their higher use of package tours, which conversely had the lowest rates of use (Figures 12 and 14).

Fig. 11: Guidebook use crossed with age Fig. 12: Guidebook use crossed with transport

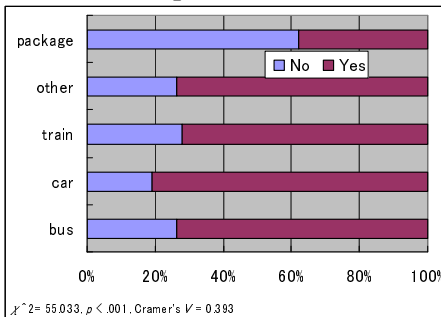
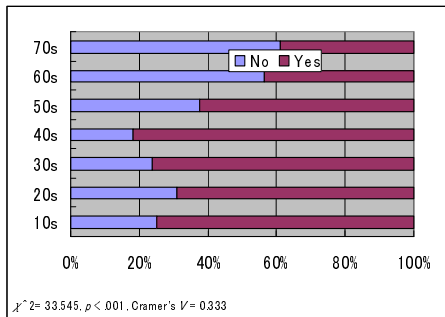
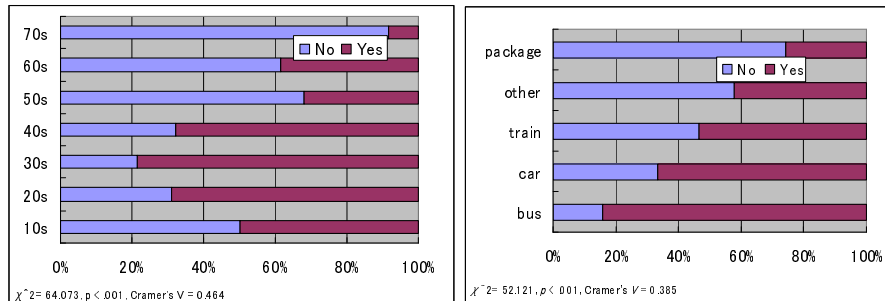


Fig. 13: Internet use crossed with age Fig. 14: Internet use crossed with transport



In summary, the 'market leader' segment identified by field work at Kamikochi consisted of pairs or small groups of well-educated, wealthy 'baby-boomers' from Kanto; 55% were aged 50 or over, and 59% came from the greater Tokyo metropolitan area. This elderly segment from Kanto tended to be repeat visitors who travelled to Kamikochi as part of a package tour, with a majority staying for 2 nights or more (55.1%). Possibly due to the inherent convenience of the package tour format, these visitors were less likely to use either guidebooks or magazines, or the internet. On the Nagano side of the Alps, many visited Norikura, another NBT destination, while on the Gifu side, the cultural market town of Takayama was the most frequent stop-off point. Almost one third of all visitors had prior experience of taking a guided tour, with UNESCO natural world heritage sites the most common destinations.

DISCUSSION

Although preliminary in nature, these results have a number of implications, both in terms of understanding the current Dh visitor segments and creating marketing strategies to reach out to new ones. Firstly, it is clear that the current Dh segmentation consists largely of wealthy, middle-aged and elderly visitors from the Kanto region who have previously visited Kamikochi. Although less than the 45% recorded in 2009, the high proportion of repeat visitors is still an encouraging sign for NBT management, likewise the fact that a majority of visitors were on a trip of 2 nights or more (47%).

However, since 49.0% from Kanto and 46.3% from Chubu were travelling as part of a package tour, it is safe to assume that the travel agencies who organize such tours are playing a crucial role, both in terms of marketing and destination selection. The package tours shaped not only the visitors' choice of off-site multi destinations, but also their participation in the on-site NPG guided tour. Further research is needed to ascertain the level to which visitors are actively targeted; for example, are elderly, wealthy housewives the target of specific campaigns, or is the high proportion of this female segment simply a reflection of the demographic trends? In either case, the evidence suggests that travel agencies are the implicit NBT 'sellers', attracting visitors via multi-stop itineraries that also contain other NBT destinations, including trekking areas such as Norikura and hot springs such as Shirahone. This finding echoes the results of the 2007 survey when many Dhs visited Norikura, and the same trend can be

witnessed on an enlarged scale in terms of the recurrent demand for UNESCO world natural heritage sites. Yet this proxy 'outsourcing' of marketing to travel agencies could cause friction if their objectives become out of synch with those of NBT management.

The implication of these results suggests an unbalanced visitor segmentation which will now be discussed. Firstly, there is a geographical imbalance; is the focus on the Kanto market, although understandable given its population density, leading to neglect of other potential markets such as Chubu? Kanto is clearly the biggest market in demographic terms, accounting for 26% of the national population.¹¹ But Chubu is geographically closer to Kamikochi, and with the highest rate of single night stays, Chubu residents could be a key market for shorter but more frequent stays than their Kanto equivalents.

Next is an income imbalance linked to geographical area. Wealth is concentrated in the urban areas, and the per capita GDP for Tokyo is 40% above the national average, so it is unsurprising that high-income segments dominate. Another inter-connected imbalance is age. Japanese society is aging more rapidly than any other society in the world, due to exceptionally high life expectancies and a low fertility rate, and these results support claims of an approaching 'silver tsunami' of elderly. From a management perspective, the lack of younger visitors, especially males, needs to be addressed in order to retain future generations. More research is needed to investigate whether ageing trends hold true for other visitor segments apart from Dhs, and what the implications are for visitor service provision. If there is a current lack of effective marketing that targets younger age groups, the high proportion that travels by car could be a hint for promotional channels; via free magazines left at Service Areas, for example, or improved directional signs on the highway.

LIMITATIONS AND FUTURE RESEARCH

Although the three sets of cross analyses listed above – area, age and information – have gone some way to provide a detailed profile of one segment of 'market leaders,' these results represent only a small section of the data that could be mined to create an index of visitor segments. For example, one interesting sub-section of results that merits closer investigation was the high proportion of visitors who stopped off in Norikura; did these multisite visitors have a particular passion for nature, or had they committed to the package tour due to persuasive marketing?

Another means of analysis would be detailed comparison with previous surveys. For example, comparing with 2007 results shows that areas of residence differed notably from Kanto's 40% and Chubu's 47%. Also occupation was weighted more towards salaried workers (54%), with a greater propensity for civil servants (14%) but fewer housewives (10%). There are numerous possibilities for such comparisons, but in order to compare accurately requires an ongoing monitoring system to collect better feedback for marketing as well as long-term trends for managers.

¹¹ Compared to 14% in 1920 when the first census was carried out.

This study has extended the considerable body of existing research on NBT and national park visitors by analyzing socio-demographic variables with the explicit aim of providing an in-depth segment profile useful for marketing purposes. In doing so, it has underlined one of the key failings of current management plans, which often contain communication facilities to 'interpret' natural resources for different types of *existing* visitors, without an equivalent marketing strategy to actively attract *potential* visitors. Given the current decline in overall visitation, national parks will increasingly need to employ marketing techniques to reach out to underrepresented generations in order to maintain visitor numbers – and management budgets – in the future.

TOWARDS A NBT MARKETING STRATEGY

Although the need for targeted marketing is clear, some significant barriers to marketing NBT resources exist; whether they are national parks or other public goods. Firstly, mixed ownership complicates the issue of homogenous marketing messages. National park land in Japan, as in Europe, is not owned outright by central government, but instead includes combinations of regional, municipal and private landowners. Thus, Japan's *chiikisei* system which Hiwasaki (2005) describes as "national park management by zoning and regulation," or "multiple-use parks," functions more in the style of a system of planning regulations than a 'set-aside' park in the US mould. Without revenue from entrance fees, funds are tight, and allocation for marketing purposes may be hard to justify given its intangible benefits. National parks do not have the resources to compete with commercial ventures, such as theme parks, which employ dedicated communications teams, and financial restraints limit the type of channels available to convey the message, as well as the frequency or depth of initial research.

As well as these practical barriers, the indirect findings of this survey suggest that marketing is currently being outsourced to travel agencies and other third parties responsible for selling package tours, without reciprocal attempts to include them as stakeholders at the management table. Neither the Forestry Agency, which owns the land, nor the Ministry of Environment, who are responsible for management, have a track record of initiating joint marketing campaigns that incorporate other stakeholders. Yet NBT destination marketing should not just be driven by a demand side agenda focused solely on increasing visitor numbers, but should seek to integrate diverse stakeholders (Prideaux & Cooper, 2002). And visitor demand templates are also required because growing heterogeneity of NBT visitor demand has created increased call for management techniques such as ROS to match zones with appropriate segments. Hence the monitoring involved in this investigation has uses other than just marketing, such as encouraging internal collaboration between commercial operators and management, and should therefore be conducted at regular intervals.

CONCLUSION

During the decades of extended economic growth and rapid urbanization, Japanese NBT faced the challenge of channelling growing visitor numbers and coping with huge, seasonal explosions of visitor demand. Now, faced with declining visitor numbers and diversifying styles of use, there is more need than ever to closely monitor the state of visitor segments in Japan's national parks.

Hence, the results of this preliminary investigation at one of the most visited parks in the Kanto area have given an insight into the Dh market segment. Results show the 'market leader' segment consisted of pairs or small groups of well-educated, wealthy 'baby-boomers' from Kanto; 55% were aged 50 or over, and 59% came from the greater Tokyo metropolitan area. These Kanto Dh's tended to be repeat visitors (66.0%) who stayed for 2 nights or more (55.1%), thus surpassing the bench mark set by previous research. However, the results provided a snapshot of visitor demand unbalanced not only by urban area, but also gender, age and income; hence further research is needed to explain the dominance of female, elderly and wealthy visitors.

One logical explanation is that these segments are *already* being targeted by travel agencies, as suggested by the 42% who came to Kamikochi as part of a package tour. If so, then it raises the question of why marketing is being outsourced to travel agencies rather than conducted via joint campaigns that incorporate a range of stakeholders. Thus although the need for targeted marketing is clear, some significant barriers to marketing NBT resources exist, including diverse objectives, mixed land ownership and insufficient funding. Transparent goals, combined with ongoing visitor segment monitoring, are thus two vital steps towards a targeted NBT marketing strategy. As future research hopes to show, focusing more on an integrated destination marketing process that is not driven purely by a demand side agenda could conversely facilitate the supply side dilemma as well by providing a more holistic framework for management.

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