CANADIAN EDUCATIONAL TOURISM: COMPARING JAPANESE AND CHINESE INBOUND MARKETS

This paper examined similarities and differences between the Japanese and Chinese inbound educational travel markets to Canada. Personal interviews with prominent Canadian education officials were combined with a survey of 102 Chinese and Japanese student respondents to obtain data for this study. The needs and wants, motives and preferences regarding study abroad and educational travel differed between Chinese and Japanese respondents.

Introduction:

The purpose of this paper is to assess the needs and motives of students from Japan and China traveling to Canada for educational purposes. The paper illustrates the importance of educational travelers to the economy. Segmenting the market is necessary, given the size and heterogeneity of the needs and tastes of different market segments. The reasons for educational travel may differ between Japanese and Chinese. This paper examined this phenomenon and determined how the needs and motivations differ between the two countries.

A review of the existing literature detailing inbound and outbound study tours and educational tourism was conducted. Preliminary primary research was conducted through email and telephone interviews conducted with 10 international education professionals at universities and in the private arena; government officials and private travel industry agents and consultants. The interviews were followed by the design and distribution of a survey of 102 Chinese and Japanese student respondents in Canadian schools.

Findings indicated that the needs and wants, motives and preferences regarding study abroad and educational travel differed between Chinese and Japanese respondents. The personal interviews indicated that, in general, Chinese educational travelers differ from Japanese educational travelers in their motivations, goals and preferences. Chinese educational travelers currently study to get a degree, and further their career prospects. Travel to study English is not usually the primary objective; English acquisition is seen as a stepping-stone. The interviewees suggest that Chinese travelers are interested in sightseeing and other kinds of travel. This might increase as they have more time and financial freedom.

Organization's serving these customers will be able to serve their needs better if they can identify the differences between the different market segments. Statistical differences were found between Chinese and Japanese respondents for the factors importance of the total price of stay and studies and socializing with friends in Canada. Japanese respondents placed more importance on price of stay and studies than did Chinese respondents. When asked about this phenomenon, a Chinese respondent
suggested that Chinese students have everything paid for by their parents, and that their parents considered study abroad a good investment. Therefore, the students did not have to worry about the cost. Japanese students usually have to fund their own study abroad.

Significant percentages of Japanese and Chinese respondents ranked socializing with friends in Canada as important or very important. These factors should be important to schools marketing to potential customers. Marketing literature focusing on the opportunity to meet many new friends might be effective. Several language school industry professionals responded that maintaining heterogeneity of the school population was important. Too much homogeneity of linguistic groups leads to overuse of the mother tongue. Even if the number of Chinese applicants swells in the future, the school would benefit from maintaining a balance between nationalities.

**Educational Travel**

Educational travelers became an increasingly important subgroup of the travel market in the last few decades (Shanka, 2002). The Japanese constituted one of the largest study abroad markets in the 1980’s. Japan remains a large source of students, but other markets are rapidly growing in importance. These include India, Korea, Taiwan and Mainland China (Citizenship and Immigration Canada, 2003a).

Japanese student travelers have traditionally focused on studying for cultural reasons, including studying English as a Second Language (ESL). They also participate in sightseeing during their stay in the destination country (Gilbert & Terrata, 2001). Research by Habu (2000) found that female overseas students from “rich” countries came to the UK to study for “cultural reasons”. That research showed that students from less wealthy countries tended to focus on “academic reasons”. Habu cited research by Matsui which found that Chinese female graduate students in the U.S. tended to have more “serious” motivations than their Japanese counterparts.

Democratization has opened some markets. China is among these and has begun to send large numbers of students abroad for study. Research indicates that the majority of Chinese international students go abroad to earn degrees or to acquire English skills as a prerequisite to furthering their education and careers. (Citizenship and Immigration Canada, 2003b; Yi, 2001). Singh (1997) predicted that the Asia and Pacific region would become central to world tourism after 2000. Singh’s article covered both inbound and outbound tourism and cited Japan, Taiwan and South Korea as major generators of outbound tourists. The article suggested that China, which had achieved double-digit growth in the preceding 5 years, would become one of the world’s largest economies in less than a decade. Shanka and Taylor (2002) wrote that the number of tourism products and the nature of distribution channels are constantly changing, thus travel agents need to re-define themselves and identify their markets.

The Institute of International Education (2003) stated that international education was extremely important to economic, political and social conditions in both developing and developed countries at all levels. In 2001, there were 132,000 foreign students registered in Canadian educational institutions. This number was up from 57,000 in 1990 and 37,000 in 1980 (Citizenship and Immigration Canada, 2003b). Forty-four percent of foreign students in Canada were at the university level. Smith and Jenner (1997) quoted WTO figures gathered between 1992 and 1995 that showed international arrivals for study purposes exceeded arrivals for conferences for several of the countries studied, including Australia, India, South Korea and Taiwan.
The Association of Universities and Colleges of Canada (AUCC, 2001) has recognized the importance and obvious benefits of international students to Canada and has recommended that the Canadian government “enhance policy” to facilitate the recruitment of international students. An AUCC brief submitted to the House of Commons stated that Canada was falling behind in international student recruitment. The brief cited research by the Department of Foreign Affairs and International Trade (DFAIT, 2003a) that estimated international students contributed $2.7 billion to the Canadian Economy in 1996.

The Department of Foreign Affairs and International Trade (DFAIT, 2003a) created the Education Marketing Unit in 1998 to work with government and non-government organizations and academic institutions to advance the Canadian education and training sector internationally. The Canadian Knowledge Industry homepage on the DFAIT website states that the demand for education and training services is increasing rapidly around the globe. The website stated that the industry makes a significant contribution to meeting the global skills needs, particularly in emerging economies.

**Trends in Educational Tourism**

Smith and Jenner (1997) identified 3 trends in educational tourism:

1. The rapid growth in the global student population.
2. Continuing education for the mature market.
3. The leisure-education hybrid.

The authors asserted that high unemployment induces students to stay in the education system longer. They expect the world student population to have quadrupled between 1970 and 2025. The mature market’s growth is attributed to adults pursuing further credentials, taking sabbaticals and pursuing personal growth. The authors noted the growing trend of blending education with leisure. Examples include educational cruises with guest lecturers aboard and the Disney Institute that combines tourism with “creative challenges”.

Several authors (Chadee & Cutler 1996, Shanka & Taylor, 2002) have cited the growing importance of the international student market and the lack of research in this area. General principles of marketing segmentation and differentiation apply to the travel market and should be considered when analyzing the attributes of consumers in the study abroad market. The characteristics and motives of international educational travelers have been documented in a number of journal articles, but most authors comment on the shortage of research. Chadee and Cutler (1996) found that research in the student segment of the international travel market is lacking despite the growing size and significance of this market. The authors noted that little is known about the motives, travel patterns and behaviors of overseas student travelers. The Chadee and Cutler study compared Asian and European students and determined that there were differences in preferences between the groups.

Shanka and Taylor (2002) examined travel agencies’ perceptions of higher education students as a market and concluded that the student market contributed approximately 8% to the travel agencies’ business, and this market segment should not mistakenly be written off as “low priced and low profit customers.” According to Shanka and Taylor, student demographics are rapidly changing and the methods for segmenting and differentiating groups need to be reassessed. The authors found that travel agents need to further segment their markets and develop strategies to target the new segments. Ryan (2001) studied 400 visitors to New Zealand from China. He found them to be of above-average income and educational attainment.
Advantages of Studying in Canada

Canada competes with several other countries in the market for international students, notably the U.S. A DFAIT (2003b) market brief focusing on the market potential of the Philippines stated that Canada’s profile as an educational destination was extremely low. The document suggested that Canada has the potential to gain market share from the U.S. Canada is more affordable than the U.S., has a high quality education system, and is perceived to be a safe and clean environment. Canada is perceived as being a culturally diverse and tolerant society, and there is a strong Filipino network.

After September 11th 2001, many applicants perceive the U.S. as a less friendly destination than Canada. Canada is viewed as a safe, inexpensive educational destination without the restrictions, scrutiny and obstacles of the U.S. student-visa system. The AUCC (2001) cited research showing that Canada’s main competitors were the U.S., UK, Australia, New Zealand and France. The main thrust of the document is that Canada’s competitors have an “overall government-wide approach to international student recruitment, whereas Canada is falling behind. Murray (1995) stated that the U.S., UK, Australia and Germany are among the countries competing for international students.

In 2001, 43% of foreign students studying in Canada came from East Asia (Citizenship and Immigration Canada, 2003b). In 1984, Japan became the leading sending country, and after 1994 the numbers of students from China and South Korea increased dramatically. These figures underscore the trend of China increasing as the main source of students and Japan declining relative to China. Accordingly, the number of staff at the Beijing office of Citizenship and Immigration Canada has increased threefold to handle the backlog of student applications (Citizenship and Immigration Canada, 2003b).

A DFAIT (2001) document on education marketing strategies for China stated that China’s education market has vast potential. The factors cited as making education the largest growth sector in China in 2000 include the country’s lack of educational capacity, increased exposure to the outside world, and a culture that emphasizes the value of education. Between 1998 and 2000, the number of students from China applying for student authorization increased from 3,361 to 12,000.

Gilbert & Terrata (2001) found that Japanese tourists’ travel motives differed depending on age and gender. A significantly larger proportion of younger Japanese were interested in knowledge and education than the older contingent. Younger people also rated adventure and meeting local people more highly than did the older respondents. The authors found that the proportion of young female travelers increased from 20% to 40% between 1970 and 1995.

The purpose of this paper is to assess the needs and motives of students from Japan and China traveling to Canada for educational purposes. The paper illustrates the importance of educational travelers to the economy. Segmenting the market is necessary, given the size and heterogeneity of the needs and tastes of different market segments. The reasons for educational travel may differ between Japanese and Chinese. This paper will examine this phenomenon, and determine how the needs and motivations differ between the two countries.

Methods

A review of the existing literature detailing inbound and outbound study tours and educational tourism was conducted. Preliminary primary research was conducted through email and telephone...
interviews conducted with 10 international education professionals at universities and in the private arena; government officials and private travel industry agents and consultants.

The interviews were followed by the design and distribution of a survey of educational vacationers and international students in Canadian schools. Educators and administrators at six different institutions agreed to administer the survey instrument to the students. The schools included one university, one community college and four language schools.

The demographic section of the survey determined gender, age, occupation and nationality. Seven multiple choice questions examined the kind of institution attended; length of stay in Canada; intended duration of stay; preferred accommodation; purpose of study; activity undertaken on last day off; source of information about the institution and the main factor in choosing a school. Sixteen factor questions were asked using a five-point Likert scale. These factors ranked the importance of factors from not important to very important. Factors included outdoor recreation and sports; visiting famous places; employment; studying a Canadian cultural activity; the total price of stay and studies; sightseeing in Canada; and, learning about Canadian culture.

The surveys were analyzed on SPSS software and Microsoft Excel. Cross tabs were done using both SPSS and Excel. Non-parametric tests and independent sample t-tests were done on SPSS. The null hypothesis was that there would be no difference between the needs and motives of students from China and Japan. The null hypothesis would be rejected if differences were found.

Convenience sampling was used. The majority of Japanese students in Canada attend language schools and the majority of Chinese students in Canada attend university. The sample reflects this. The response rate was unknown because there was no control over the distribution of the surveys. Teachers and school directors at multiple geographic locations were asked to distribute surveys to their students. An average response rate was not calculated. The total number of usable responses was 102 (37 Japanese and 57 Chinese)

**Results and Discussion**

The personal interviews indicated that, in general, Chinese educational travelers differ from Japanese educational travelers in their motivations, goals and preferences. Chinese educational travelers currently study to get a degree, and further their career prospects. Travel to study English is not usually the primary objective; English acquisition is seen as a stepping-stone. The interviewees suggest that Chinese travelers are interested in sightseeing and other kinds of travel. This might increase as they have more time and financial freedom.

The interviews suggest that Chinese students had more ease getting visas to enter government institutions than private language schools. This fact contributes to the skewed results in the survey, which found Chinese more likely to pursue academic goals. The majority of Japanese educational travelers still see English as a reason to undertake educational travel. They are more inclined than the Chinese to study for “recreational” purposes and less inclined to pursue academic degrees than Chinese educational travelers. However, Japanese students were increasingly inclined to study specialized courses such as Business English and TOEFL preparation.
Survey Results

Japanese (n = 37) and Chinese (n = 57) respondents were divided into gender, age groups and occupations. The respondents were mostly students and the Chinese respondents were generally younger, predominantly from the 18-23 age group. More of the Japanese respondents were over 24 years old. The Chinese respondents were closely divided between male and female. There were almost three times as many female Japanese respondents as male. Chinese respondents were mostly divided between ESL schools (53.4%) and University (39.7%). The majority of Japanese respondents (92.9%) were students at ESL schools.

Japanese and Chinese respondents had stayed in Canada for similar lengths of time. The majority of Chinese (28.8%) and Japanese (32.6%) were living in Canada less than three months. Approximately 10% of each country's respondents had been in Canada more than two years. Chinese respondents studied more on their days off (24.1%); Japanese went shopping more (26.5%); and Chinese were more inclined than Japanese to enjoy home entertainment (16.7%). Enjoy a recreational activity was a prominent answer for both Chinese (42.6%) and Japanese (55.9%) groups.

Respondents were asked to rank the following in terms of importance on a five-point scale spanning not important (1), minimally important (2), somewhat important (3), important (4) and very important (5):

Outdoor recreation and sports (Figure 1)
Visiting famous places (Figure 2)
Employment (Figure 3)
Studying a Canadian cultural activity (Figure 4)
The total price of stay and studies (Figure 5)
Socializing with friends in Canada (Figure 6)
Sightseeing in Canada (Figure 7)
Learning about Canadian culture (Figure 8)

The majority of respondents ranked the importance of outdoor recreation and sports as somewhat important to very important. Sixty-five percent of Japanese respondents rated this attribute as important or very important. The largest cohort of Chinese respondents (40.7%) ranked this attribute as “somewhat important” (Figure 1).

Figure 1: Importance of Outdoor Recreation and Sports
All respondents ranked the importance of visiting famous places similarly. Chinese (83%) and Japanese (86%) ranked this variable as at least somewhat important. Only 8.5% of Chinese and 14% of Japanese viewed this attribute as minimally or not important (Figure 2).

**Figure 2: Importance of Visiting Famous Places**

![Importance of visiting famous places](image)

Very few respondents from either group rated the attribute studying a Canadian cultural activity as not important or minimally important (Figure 3).

**Figure 3: Importance of Studying a Canadian Cultural Activity**

![Importance of studying a Canadian cultural activity](image)

Almost none of the respondents rated the total price of stay and studies as not important or minimally important. The majority of Chinese respondents (95%) ranked this attribute at least somewhat important. A larger proportion of the Japanese cohort ranked this attribute as very important (55.8%) (Figure 4).
Both Japanese and Chinese respondents ranked socializing with friends in Canada as high in importance. The percentage of Japanese ranking this variable as at least important was 93%. The percentage of Chinese respondents ranking the variable as important or very important was 71.2% (Figure 5).

The majority of respondents ranked the importance of sightseeing in Canada as somewhat important, important or very important. Sixty percent of Japanese respondents rated this attribute as important or very important. Only 49% of Chinese responded in this way. The largest cohort of Chinese respondents (45.8%) ranked this attribute as “somewhat important”

**Discussion of Survey Findings**

Japanese students were more interested in sightseeing and outdoor recreation. A greater percentage of Japanese responded “important” or “very important” for both of these questions. Japanese were more interested in socializing with friends in Canada and with the prestige and reputation of the
institution. Chinese students were much more interested than the Japanese in obtaining undergraduate and graduate degrees.

The Japanese appeared to answer similarly to the Chinese on the following questions:

8b. importance of visiting famous places  
8c. importance of employment  
8e. importance of studying a Canadian cultural activity  
9d. learning about Canadian culture

Further statistical analysis was required in order to state conclusively that significant differences exist between the two groups. The tests executed on the data were the non-parametric Mann-Whitney test and the Wilcoxon test. The two-tailed significance level in the highlighted cells was less than .05. The null hypothesis that the two groups are the same was rejected. Significant differences in the opinions of the importance of questions 9a- the total price of stay and studies, 9b- socializing with friends in Canada were found between Japanese and Chinese respondents.

Independent samples T-Tests were then used because there was no relationship between the different groups (Chinese and Japanese). Results from the t-tests support the results from the cross tabs and the non-parametric tests. The results of the answers to 9a- the total price of stay and studies, and 9b- socializing with friends in Canada, revealed significant differences. These results strongly suggest that Chinese and Japanese respondents differed significantly in terms of the importance they place on the total price of stay and studies and socializing with friends in Canada.

**Conclusions and Recommendations**

The Chinese international education market has vast potential. Findings in this paper concur with Drucker (1995) and The Canadian Tourism Commission (2001) that the outbound Chinese travel market will continue to grow in line with the overall growth in the Chinese economy. Personal communication with a DFAIT official supported that China had become the largest source of international students coming to Canada.

Findings indicated that the needs and wants, motives and preferences regarding study abroad and educational travel differed depending on whether the respondent was Chinese or Japanese. This is important because organizations serving these customers will be able to serve their needs better if they can identify the differences between the different market segments. Statistical differences were found between Chinese and Japanese respondents for the factors importance of the total price of stay and studies and socializing with friends in Canada.

Japanese respondents placed more importance on price of stay and studies than did Chinese respondents. When asked about this phenomenon, a Chinese respondent suggested that Chinese students have everything paid for by their parents, and that their parents considered study abroad a good investment. Therefore, the students did not have to worry about the cost. Japanese students usually have to fund their own study abroad.

Japanese students were found to place more importance than Chinese on socializing with friends in Canada. This supported the findings of Toyokawa and Toyokawa (2002). Socializing and recreation are often important to Japanese students abroad. Chinese respondents generally expressed an interest in
sightseeing and cultural activities. Tourism companies should take note of this. Just as Japanese educational tourists have spent abundant sums on tourism in the past, the Chinese might in the future.

Significant percentages of Japanese and Chinese respondents ranked socializing with friends in Canada as important or very important. These factors should be important to schools marketing to potential customers. Marketing literature focusing on the opportunity to meet many new friends might be effective. Several language school industry professionals responded that maintaining heterogeneity of the school population was important. Too much homogeneity of linguistic groups leads to overuse of the mother tongue. Even if the number of Chinese applicants swells in the future, the school would benefit from maintaining a balance between nationalities.

Findings suggested that Japan is no longer the primary Canadian inbound market for study abroad. A decade ago, Japanese educational travelers came to Canada in larger numbers and spent more freely. The recent economic downturn has made a negative impact. The majority of Japanese respondents rated price as a very important factor. Marketers should take note of this. This probably reflects the economic downturn in Japan. This also reflects the fact that many students are funding their own studies abroad. Institutions catering to Japanese students might consider whether they can gain from more value-added services, like job training or internships.

Schools should be aware that Japanese students expect quality education, a good reputation and a convenient location close to amenities. Although Japanese students are becoming more concerned with taking internships and TOEFL courses, they still demand cultural experiences such as home stays. The Japanese also placed a very high degree of importance on excellent teachers and teaching methods.

China represents a huge market after visa restrictions are eased. An increase in disposable incomes will contribute to an influx of Chinese students. Private language schools and other training institutions will see an increase in Chinese enrollment and could prepare for this by becoming familiar with the changes in tastes and preferences of this market. The relative importance of sightseeing to the Chinese respondents could also suggest that they might appreciate the integration of some outdoor activities into the curriculum.

The burgeoning market for youth summer camps for Chinese suggests that they might want to come to Canada to explore the language and culture, and not just serious academic study. This might have profound implications for private institutions and language schools catering to this demand - if the visa process becomes more liberal in the future. Outdoor recreation and sports were ranked highly by both Japanese and Chinese respondents, as was visiting famous places. Curriculum designers could consider having students participate in these activities, or they could include the subject matter in course material.
References

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