



Japan: Market Potential for Educational Travel to the United States

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Introduction

While Japan has long been a source of steady inbound travel into the United States, the educational travel sector has not been sufficiently featured. Given the size and potential of this market segment, this report would like to provide travel industry stakeholders with a look into Japan's educational travel market potential.

Overview Educational Travel (Shu-gaku Ryoko)

School organized student trips, known as "Shu-gaku Ryoko" in Japanese, are a typical Japanese tradition. Students at both public and private schools participate in school trips organized by their schools, starting such trips as early as in elementary school and continuing all the way to high school. Participation in school trips is in most cases is compulsory since such trips are considered part of the school curriculum. School trips are a major event for every school, and approximately 98.4% of junior high schools and 97.1% of high schools in Japan execute such trips (Japan School Tours Bureau 2012).

According to Education Ministry guidelines, the goal of school trips is to "broaden student knowledge and enable students to contact nature by being exposed to a different environment." Furthermore, another goal would be "learning proper public morals by experiencing group living." In most of the cases, schools choose May (47.9%) or June (34.1%) for their school trips (82% choosing either May or June), with an average length of 3 days (98.4%, junior schools) (Educational Tour Institute). Average spending per student ranges from JPY 55,000 to JPY 59,999 (ETI).

There is a growing trend of choosing foreign countries for school trip destinations, especially among private schools.

History

The origin of school trips goes back to the Edo period. In fact, it is said that the custom of visiting shrines eventually morphed into current day school trips. The time consuming yet rewarding process of visiting shrines, especially the Grand Shrine of Ise located in Mie Prefecture, was greatly valued during the Edo period. People often took a journey to the shrine by groups, and such group travel and cohabitation came to be regarded as a suitable way for character-building for students. Therefore, the school trip is a reformed version of old traditions from the Edo period.

School Trip Content

Various activities are organized for students throughout school trips. Activities are arranged under the following three themes.

- 1) Experiencing history and tradition
- 2) Recreation
- 3) Reflecting on the importance of peace

For example, activities such as Zazen (meditative practice), watching traditional Noh-plays in English, and tea ceremony are organized in accordance with the purpose of experiencing history and tradition. A visit to Hiroshima Peace Memorial is a typical activity taken by schools to allow students to reflect on the meaning of peace.

One feature of Japanese school trips that should be noted is that students do not always do activities as a whole group, but are separated into independent groups to explore on their own. Within these smaller groups, usually of 5-6 students, the students can take initiative to decide what sites to see, and receive permission to do so. Japan's public transportation system allows for students to venture out to the off-beat temple or spend additional time at a museum. All Japanese school trips have different combinations of mandated group activities for the whole, and smaller group activities for groups of 5-6 students. For many students, these school trips may be their first time away from home, and first time spending the night with non-family members.

Junior High Schools

Approximately 94.7% of both public and private junior high schools (Japan School Tours Bureau) execute school trips. One feature of junior high school trips is that majority of destinations are domestic, with only a few exceptions. Junior High schools tend to select closer destinations in neighboring areas. For example, according to the statistics calculated by JSTB, 74% of schools in Hokkaido (the Northern island of Japan) choose either Hokkaido or the neighboring Tohoku area as their school trip destination.

For junior high schools, school trips are organized during the third year of school. Popular months for school trips are May, June, and April (*Table 1*), and the average spending is JPY 61,838 per student with a breakdown of JPY 57,271 for public schools, and JPY 84,342 for private schools. Considering that these trips are usually 3 days, student spending is a significant economic impact.

Table 2 shows the top 3 destinations for junior high school domestic school trips in 2013 (ETI). The top two, Kyoto and Nara, are previous capitals of Japan rich in history and traditional architecture.

Table 1

Top 3 Month for School Travel (Junior High School)		
1	May	36.8%
2	June	18.5%
3	April	13.7%

Table 2

Top 3 Domestic Destinations		
	Prefecture	Number of Schools (Public Only)
1	Kyoto	1,111
2	Nara	1,075
3	Tokyo	705

High Schools

There are two types of high school trips; either domestic or international. The total executing rate that involves both domestic and overseas amounts to 96.9% in 2013, which is about the same rate as a year before, which was 97.1% in 2012 (JSTB).

Three different features should be noted regarding high school trips when comparing them with junior high school trips. The first difference is the season of choice for high school trips. Unlike junior high schools, the most popular season for high school trips is during the fall/winter season with October being the most preferred, followed by December. The second feature is that students mostly go for a school trip during their second year and not during their third year. This is due to the exam schedule for college entrance examinations. Finally, the third feature is that high schools tend to select relatively far destinations for their school trips (*Table 3*). For example, the most popular destination from the Kanto area is Okinawa, and Hokkaido from the Kinki area. The average travel spending per student was JPY 96,288 in 2013, and the average number of days for each school trip was four days (3 nights) (ETI).

Table 3

Popular High School Domestic Destinations			
Departure Place	Destination	Number of Schools	Number of Students
Hokkaido	Kinki Area	215	30,216
Kanto Area	Okinawa	554	117,687
Kinki Area	Hokkaido	166	38,042

Overseas School Trips

The total number of international school travelers in 2013 amounted to 142,400, with a breakdown of 8,393 junior high school students and 134,007 high school students. This report focuses exclusively on high school international trips given the relatively small number of junior high school international trips.

As *Table 4* documents, there was only a slight decline in the number of high school travelers in 2013 compared to that of 2012 despite the lagging economy.

The top three most popular months for high school international trips, as evidenced in *Table 5*, are November, December, and October.

Table 6 shows the top 10 international destinations for high school trips. The most popular destination for overseas high school trips in 2013 was the United States including Hawaii and Guam followed by Singapore and Taiwan. One major factor that influences this ranking is geography. As the table shows, countries that rank high on the list are neighboring countries geographically close to Japan. The popularity of international destinations is also influenced by diplomatic relations. For example, the popularity of South Korea as a destination declined from top destination in 2012 to 6th in 2013, and Taiwan increased its ranking from 6th in 2012 to the 2nd in 2013. This change is greatly due to the increasing diplomatic tensions between Japan and South Korea over territorial and history recognition issues. Given the situation, whether the ranking of South Korea will rise again remains to be seen. Taiwan has benefited during this time being viewed as a friendly Asian neighbor that Japan currently has no disputes with.

Table 4

Number of Overseas High School Travelers						
	All High Schools		Public High Schools		Private High Schools	
Year	Number of Schools	Number of Students	Number of Schools	Number of Students	Number of Schools	Number of Students
2011	827	131,357	361	52,130	466	79,227
2012	827	134,176	347	51,954	480	82,222
2013	810	134,007	340	53,252	470	80,755

Table 5

Popular 3 Months for International High School Trips (among 12 months)

	Public	Private	Total	%
October	108	119	227	21.7
November	86	155	241	23
December	75	110	185	17.7
Total	269	384	653	62.4*

*Percentage: divided by the total number of both public and private schools (=1044)

Table 6:

Top 10 Destinations for International High School Trips (2013)			
	Country	Number of Schools	Number of Students
1	Singapore	145	20,968
2	Taiwan	138	20,734
3	Malaysia	133	20,139
4	Guam	101	15,257
5	Australia	114	14,778
6	South Korea	112	12,637
7	Hawaii	74	10,090
8	Mainland U.S.	57	7,052
9	Canada	43	6,493
10	France	55	6,406

Educational Tour Institute

Market Demand

As evidenced by solid statistics, there is great market demand for international school trips. *Table 7* shows both the total and average spending by international high school travelers. Total travel spending amounted to JPY 25 billion in 2013.

Table 7

Spending by International High School Travelers			
	Total Travel Spending	Average Travel Spending	
Year		Public High Schools	Private High Schools
2011	(JPY 24 bill)	(JPY 132,775)	(JPY 213,595)
2012	(JPY 24 bill)	(JPY 128,499)	(JPY 210,027)
2013	(JPY 25 bill)	(JPY 131,683)	(JPY 223,773)

According to a survey conducted by the Educational Tour Institute, 75.7% of high school trips take for 4 to 6 days (*Table 7*). Private schools tend to take more days for their international school trips compared to that of public schools.

Table 8

Average Number of Days for Each Trip (2013)

Number of Days	Number of Public High Schools	Number of Private High Schools	Total	%
4	152	91	243	23.2
5	141	228	369	35.3
6	39	141	180	17.2
Total	332	460	792	75.7*

Potential for U.S. Market

The U.S. Mainland was ranked 7th in 2013, increasing its position from the 10th in 2012. As *Table 6* shows, 55 high schools chose the U.S. for their international school trip destination, leading to 7,052 students traveling to the United States. The average number of days students stayed in the U.S. for their school trips was 7.6. The average spending per student of public high schools has slightly increased from USD 1,813 in 2012 to USD 1,829 in 2013, while there was a slight decline of private schools spending (per student) from USD 2,547 in 2012 to USD 2,533 in 2013 as *Table 9* demonstrates.

Table 9

Average Spending per student (U.S.A. specifically)

Average	Public (JPY/ USD)	Private (JPY/ USD)
2011	236,250/ 1,987	277,383/ 2,333
2012	215,583/ 1,813	302,718/ 2,547
2013	217,447/ 1,829	301,158/ 2,533

*Exchange Rate: 1USD=118.85JPY

It is important to note that these statistics above do not include Hawaii or Guam, long-time Japanese favorites for students and adults alike. When considering the total market potential for Japanese student travelers, the number would be 17,142 travelers for 2013 alone. With each spending at least \$2000, the economic impact is significant.

How to attract Japanese student travelers

So how does one tap into this potentially lucrative market? The key to success would be increasing the visibility of one's State/City as a potential destination for Japanese high school travel. The Japanese are familiar with most U.S. destinations, but need information tailored specifically for student travel in order to make educated decisions, and even consider new travel destinations. Information on homestay availability, exchange programs with local schools and other special programs students can join that could fit a group of students at once would be helpful. Additional resources such as the availability of Japanese guides at attractions, and suggested 3-5 day itineraries that incorporate any of the three themes stressed by the Japanese Government, would be welcomed. Being able to collect such information and market it in Japanese to the right audience would be the most important.

Several U.S. states/cities/areas already have tourism offices in Japan. We suggest that you touch base with them to see how they may be able to assist in your educational travel promotion efforts.

You can also reach out to the Commercial Section of the U.S. Embassy for a market briefing should you be visiting Japan. Commercial Specialist Tamami Honda would be happy to assist. The Commercial Service is also working on arranging educational travel seminars across Japan to feature U.S. destinations for school travel. U.S. destinations will be invited to participate in

these seminars on a first come first serve basis. Please reach out to Tamami Honda for additional details.

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Conclusion

In conclusion, educational school trips continue to serve as huge events arranged by schools with significant economic impact. Despite costs, parents have been largely supportive of student participation leading to near perfect participation rates. Parents and educators alike feel that visiting actual sites adds different elements beyond simple textbook lectures. Furthermore, schools also see international travel as a positive way to feel the world in a globalizing society. The market is thus expected to increase given the prospective growing ratio of international school trips and the need for Japan to further globalize.

Resources & Contacts

U.S. Government

National Travel & Tourism Office (NTTO)
Phone: 202-482-0140
Fax: 202-482-2887
Website: <http://www.tinet.ita.doc.gov/>

U.S. Public Private Partnership Organization

Brand USA
Phone: 81-3- 3225-1835
Fax: 81-3-3225-1836
Website: <http://www.thebrandusa.com/>

U.S. Private Sector Organization

U.S. Travel Association Japan Office
Phone: 81-3-5355-0362
Fax: 81-3-5355-0363
Website: <https://www.ustravel.org/>

Visit USA Committee Japan
Website: <http://www.visitusa.jp/>

Japanese Government

Japan Tourism Agency, Ministry of Land, Infrastructure, Transport and Tourism (MLIT)

Phone: 81-3-5253-8111

Fax: 81-3-5253-1563

Website: <http://www.mlit.go.jp/kankocho/en/>

Ministry of Education, Culture, Sports, Science and Technology (MEXT)

Phone: 81-3-5253-4111

Website: <http://www.mext.go.jp/english/>

Japan National Tourism Organization (JNTO)

Phone: 81-3-3216-2905

Fax: 81-3-3216-1978

Website: <http://www.jnto.go.jp/>

Japanese Private Sector Organization

Japan Association of Travel Agents (JATA)

Phone: 81-3-3592-1274

Fax: 81-3-3592-1268

Website: <http://www.jata-net.or.jp/english/index.htm>

Japan School Tours Bureau (JSTB)

Phone: 81-3-5640-8061

Fax: 81-3-5640-8062

Website: <http://www.jstb.or.jp/> (Japanese website only)

The Educational Tour Institute (ETI)

Phone: 81-3-5275-6651

Fax: 81-3-5275-6653

Website: <http://shugakuryoko.com/> (Japanese website only)

Trade Events

Name: Brand USA Pavilion at JATA Tourism EXPO Japan 2015

Date: September 24-27, 2015

Location: Tokyo (Tokyo Big Sight)

Website: <http://t-expo.jp/en/>

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