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RESEARCH ON THE ADJUSTMENT OF CROATIAN TOURIST OFFER TO JAPANESE TOURISTS EXPECTATIONS

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Abstract: A fundamental problem of Croatian tourism is insufficient quality level leading to seasonality, insufficient capacity utilisation and (non) profitability.

Today, when tourist markets are turbulent, it is important to know a tourist, their wishes, expectation and outdo these. In order for the tourist to be satisfied, it is crucial to meet all segments of their expectations.

Though an important aspect of tourist product or offer quality, insufficiently mentioned in Croatia is the respect of the culture the tourist comes from. Croatia is opening to new non-traditional markets it needs to adjust to. In order to remain competitive and continuously increase product and service quality, even the most unusual tourists' requests should be met. Quality implies attitude: never say no to a client.

This paper presents the results of researching readiness of Croatian tourist offer to meet specific Japanese tourists' requests.

Key words: quality, Japanese tourists, culture, offer analysis.

INTRODUCTION

One of fundamental problems of Croatian tourism is insufficient quality level which leads to other difficulties like seasonality, insufficient capacity utilisation, accordingly (non) profitability and similar.

Today, when tourist markets are turbulent, it is important to know a tourist, assume their wishes and expectation and outdo them as well. In tourism, client is the

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beginning and the end of the whole process, the centre around which tourist activities evolve. In order to make the tourist satisfied with the received, it is crucial to meet all segments of their expectations, to understand the quality and all its aspects.

Insufficiently mentioned in Croatia is the respect of the culture the tourist comes from. Croatia is opening to new non-traditional markets it needs to adjust to. Culturological traits help us understand and raise tolerance towards other nations; tourism is the perfect generator for such a change.

Although the sociology of tourism has become increasingly important only lately, it is very important to bear in mind precisely the culturological trait of the entire process.

Conducting tourist activities, the author cooperated with many foreign tour operators, Asian in particular, who for different groups of tourists, from different national, religious and culturological backgrounds, had rather unusual requests in terms of respecting culturological traits or customs. With the objective to remain competitive and to maintain and increase product and service quality, even the most unusual tourists' requests should be met. Quality implies attitude: never say no to a client.

This paper presents the results of researching the readiness of the Croatian tourist offer to meet specific requests of Japanese tourists.

1. SOCIOLOGY OF TOURISM ON CULTUROLOGICAL DIVERSITIES

Sociology of tourism has a rather brief history in Croatia. For several decades, it has concentrated on an important segment of cause-and-effect relation generated by tourism. In contemporary times of analysing tourism, particularly prominent are socio-culturological factors formed inside the area where tourism is conducted.

In sociological terms, a tourist is usually a person voluntarily relaxing and visiting a distant location far from their home, with the objective to experience a change. In contemporary world in which the tourist truly wants to meet another culture, tourism is the bridge helping to understand diversities.

In culturological terms, tourist market is different from domicile offering possibilities and challenges different from usual. By visiting and gaining an insight into a life completely different than their own, a tourist interacts between cultures, broadens their cognitions and horizons and enriches their own culture. Upon returning home, they will transfer their experiences.

Social and culturological influences of tourism are of fundamental importance. Although tourist activities greatly contribute to mixing and meeting other cultures, they can have negative consequences in cases when interests of tourists and hosts differ. From sociological point of view, tourism is a much more complex phenomenon. The tourist has a certain social position and status and chooses the vacation destination as a consequence of their socio-economic and cultural status.

2. FACTS ABOUT JAPANESE TOURISTS (Japanese tourists expectations)

Japanese are known for being specific. Firstly, they are rather service oriented nation expecting the same attitude from others. In Japan, everything is subordinated to the buyer which corresponds to the quality theory. This chapter presents some facts on Japanese tourists.

General

Japanese:

- have a similar number of vacation days to those in European countries; however, their mentality and strictly market oriented work system allow them to use all days off during working age
- mostly travel in later years when they have time and money; travelling is a prize for efforts during life
- are healthy life and cuisine oriented; Japanese cuisine is considered one of the healthiest throughout the world. When travelling, Japanese expect benefit for their health as well
- society is very closed and has difficulties in coming to trust other nations
- usually do not speak foreign languages well and lack self-confidence
- are known as organized, diligent and prone to details
- are used to full scheduled vacations; they like programmes from early morning till late evening. They do not prefer to organize their own entertainment or have free time which is acceptable only when close to shopping malls
- strictly respect other people. When having objections, they will state them later
- have a long tradition of giving souvenirs

Hotel

- When travelling, Japanese expect to have rooms with tubs
- Even married couples like to sleep in separate beds and request twin beds in hotels during travels. Exceptions are couples on their honey moon
- Japanese have problems adjusting to starlit nights; it is very important for hotel rooms to have dark curtains
- There are many male smokers. Smoking rooms need to be provided for Japanese guests who smoke
- Hierarchy is very important in Japan. Japanese like to stay at rooms located on upper hotel floors which gives them sense of importance
- If travelling in groups, it is important that all guests in a group get rooms of the same standard
- Japanese usually go to bed early; thus it is not recommended to give them rooms close to public areas in a hotel since possible noise could result in complaints
- It is very important for staff to be patient with Japanese since they do not speak English well

Restaurant

- Japanese mostly travel in later years and look after their health. Although they try new, specific flavours, food should never be too spicy
- It is improper to leave food on the plate in Japan. Restaurant owners and managers are recommended to dose food quantity
- Older guests do not eat a lot of meat. Menus need to be made very attentively
- Japanese prefer various vegetables (both fresh and boiled). Variety is important part of their nutrition
- Japanese do not prefer rice, unless authentic
- Soya sauce should always be close, regardless of cuisine or restaurant type
- Wet hand towels (Oshibori) are desired before meal
- It is very important to stick to programme time frame. Lunch needs to be served within an hour the most and dinner in an hour and a half to two hours
- It is recommended that menus in restaurants are translated in English/Japanese
- In restaurants, special attention needs to be given to food quality and quantity, to guests wishes and waiters manners as well
- visual impression of food and its arrangement is very important
- Japanese guests prefer to sit inside the restaurant, regardless of season

Tourist guides

- It is very important that guides know the mentality and expectations of Japanese tourist
- They should know a few introductory Japanese words
- Concise and simple information is expected from guides, it is very important to keep the sightseeing tours within arranged time since daily programmes for Japanese tourists are rather ample
- Visual impression which guides make is very important. Japanese expect every employee to be officially and adequately dressed when working (details like shirt and tie or closed shoes are also noticed)
- When travelling in group, Japanese expect completely same treatment. It is recommended that the entire group is addressed, not individuals

Transport / Drivers

- When travelling, Japanese expect maximum comfort. They expect two seats for each person on the bus
- It is recommended for the driver to have a tie and be formally dressed
- It is absolutely unacceptable for the driver to talk on cell phone or to someone from the group when driving
- Japanese guests are usually older people; thus drivers should be experienced, stay within speed limit and drive carefully
- They expect to be served mineral water on busses, as a welcome gesture

Japanese guests are very sensitive to the service ordered. They expect solely the same type and level of service they ordered. Under Japanese laws, in case of change and disproportion between the service offered and the one provided, service provider

(indirectly) and tour operator (directly) are liable to paying penalties. Even a better service than the one ordered can cause dissatisfaction and demand the paying of penalties.

3. JAPANESE TOURISTS IN CROATIA

Although some Croatian tour operators mention with pride their longer tradition of the arrival of Japanese tourist, Croatia hasn't been particularly familiar in Japan until recently. War situation resulted in rather negative perception of Croatia with average Japanese; in late 1990s, a turning point happened thanks to world football championship (FIFA) at which both Croatian and Japanese teams played which aroused interest of the Japanese public. Furthermore, the Croatian Tourist Board (HTZ) organized actions which popularized Croatia; certain famous Croats popular in Japan in music, sports and film also helped. By year 2006 tourist information on Croatia were available to Japanese in only one tourist brochure, i.e. one chapter covering the South East European countries. In 2007, four professional tourist publications were issued, together with numerous articles in magazines and various media campaigns. Croatian Embassy in Japan actively promotes Croatia as a tourist country; in 2008 the HTZ opened their office in Tokyo which confirms the popularity of Croatia as a travel destination in Japan. Over the past few years, direct charter flights have been organized from biggest Japanese cities. The growth of the arrival of Japanese tourist and their room/nights is more than 100% annually. By August 2008 more than 50,000 Japanese tourists visited Croatia. Japanese travel throughout the year and are a very interesting tourist generating market. Despite the announced crisis and recession Japanese market is going through, it is anticipated that similar growth will continue since Croatia is rather new extremely popular destination and that recession will primarily hit traditional destinations. Considering big potential of the Japanese tourist generating market and big growth of room/nights occupied by Japanese groups, the objective of this paper is to point to the current adjustment of tourist offers and services in Croatia with Japanese tourists' requests as well as to possible deviations and chances for improvement and further growth.

4. RESEARCH ON THE ADJUSTMENT OF CROATIAN TOURIST OFFER TO JAPANESE TOURISTS EXPECTATIONS

Research was implemented on a questionnaire filled in by 1200 subject in the period from May 2006 till October 2008. Out of 1200 questionnaires, 900 of them were taken as a valid sample; 300 questionnaires from 2006 were processed, 300 from 2007 and 300 from 2008. The biggest tourist generating cities taking the largest ratio of Japanese tourists coming to Croatia are Tokyo, Osaka, Nagoya and Kyoto. The reason behind rather long research is the possibility to compare the survey results and knowledge on possible improvement through increasing arrivals of Japanese tourists. Subjects took part in travels throughout Croatia which were organized by various tour operators to avoid possible bias, i.e. results linked to (bad) quality of one tour operator, in order to get objective impressions from Japanese visitors.

Subjects' demographic structure is given in the table below.

Table 1: Subjects demographic distribution

Sex	No. of subjects	Percentage %
Male	279	31%
Female	621	69%
Age distribution		
Under 30	36	4%
30-40	81	9%
40-50	99	11%
50-60	135	15%
Above 60	549	61%
Education		
No elementary education	18	2%
Elementary education	45	5%
Secondary education	135	15%
Two-year post-secondary school and university qualifications	495	55%
Scientific/Research education level	207	23%

Source: Made by the author

The table shows that almost 70% of subjects were women. Even more than 60% were persons older than 60. The most represented education level was two-year post-secondary school and university qualifications. Likert five-point scale was applied for estimating the services. The questionnaire was written in Japanese, and the results later translated into Croatian.

The table below provides a sample of the questionnaire used in this research.

Table 2: Questionnaire

CATEGORY	GRADE				
	1	2	3	4	5
GENERAL					
How satisfied are you with the overall trip organization?					
How well was principle "value for money" met?					
Estimate the kindness of the local population					
Estimate the general population's awareness of culturological diversities					
HOTEL					
Were the services in accordance with your expectations?					
Estimate the professional behaviour of hotel staff					
How successfully did the hotel product (rooms, restaurant) meet your expectations?					
Estimate the understanding of the hotel staff for the culture you come from					
Estimate reactions of hotel staff on your possible complaints /problems					

continued table 2.

Estimate kindness of the hotel staff					
How well is the hotel ready to receive Japanese guests?					
Your comments					
RESTAURANT					
Estimate the professional behaviour of restaurant personnel					
Were the services in accordance with your expectations?					
How successfully did the hotel product (menu, flavours) meet your expectations?					
Estimate adequacy of menu quantity					
Estimate the understanding of the staff for the culture you come from					
Estimate kindness of the staff					
How well is the restaurant ready to receive Japanese guests?					
Your comments					
TOURIST GUIDE					
How interesting were guiding tours?					
Grade your tourist guide					
Estimate the professional behaviour of your guide					
Was your guide warm and kind?					
How much experience did your guide have with Japanese tourists?					
What was guide`s knowledge on Japanese culture?					
Did the guide respect the time limits and was punctual?					
Were the guiding services in accordance with your expectations?					
How well is the guide ready to serve Japanese guests?					
Estimate guide`s (professional) appearance					
Your comments					
DRIVER					
Estimate driver`s professional behaviour					
Estimate the feeling of safety during driving					
Was the transport service in accordance with your expectations?					
Estimate driver`s courtesy					
Estimate driver`s (professional) appearance					
Your comments					
ADDITIONAL QUESTIONS					
Date of filling in the questionnaire					
Which tour operator did you travel with?					
Why did you choose this tour precisely?					
You overall comments/suggestions/compliments?					

Source: Made by the author

Certain categories were repeated for main Croatian tourist centres: Zagreb, Plitvice, Opatija, Split and Dubrovnik, where the biggest number of Japanese tourists comes, to get an impression on possible deviations in relation to certain destinations or regions.

The questionnaire tried to make conclusions about four basic elements in travel organizing: accommodation, food, sightseeing and transportation. General questions were added to find out when was the questionnaire answered and what were some general positions and opinion of the subjects.

5. RESULTS

Understanding of their culture and the adjustment of services with their traditional habits and expectations is very important to Japanese tourists; all subjects consider the two categories extremely important.

1) Group of general questions

Group of general questions show that around 67% of subjects estimated the overall travel quality and “value and money” with 4 and 5, pointing to a satisfactory organization as well as highlights and content ratio. Around 44% of tourists graded question 4 with 4 and 5, while 56% of subjects graded it from 1 to 3; almost 18% of subjects gave only one point to the awareness of culturological differences and adjustment to these. Since most subjects estimated precisely this category as an important one, we reach a conclusion on a significant quality disproportion. However, in three years significant improvement can be noticed; year in year out, fewer subjects graded this question low thus pointing to increased awareness of the population on culturological differences and to increased products and service quality.

2) Group of questions – hotel

Hotel offer is the backbone of the tourists offer and greatly contributes to the overall travel quality. Questions on hotel services quality was made with particular care and got the highest points. The highest grade was given for its quality level compared to other tested categories. Japanese tourists aren't a traditional market for Croatian hotel managers, though a certain adjustment period is necessary for Croatian hotel managers to get used to specific requests of Japanese groups and adjust their offer accordingly.

Survey covered most three to five stars hotels in towns visited by subjects; higher grade was given frequently to lower category hotels thus demonstrating no correlation between hotel category and service adjustment.

Adjustment of services with their expectation was given 4 or 5 by around 53% of subjects. 57% of subjects graded the adjustment of the hotel product with 4 with 5, and the remaining 43% from 1 to 3. This points to increased satisfaction with hotel product (room, hotel structure and similar) and somewhat lesser satisfaction with the service of the hotel staff. Free commentaries point to dissatisfaction with the attitude of the hotel personnel and their tolerance for special requests. Mostly positive grades were given to higher category hotel products, while high grades for hotel service were given by visitors staying in all hotel categories.

Particularly defeating was “staff reaction to possible complaints” where 3 was the highest grade, 71% graded it with 1 or 2 since Japanese tourists are used to high helpfulness and to always putting the guest before profit. Japanese expect a specific and very demanding attitude to clients and the reaction of the hotel manager in cases of complaints, which obviously failed to occur in Croatian hotels. It was noticed that higher grades were given outside high season when lesser omissions happen because of lower occupancy rate and the readiness of the staff to treat Japanese guest in the adequate way.

65% of subjects graded category “kindness of the hotel staff” with 4 and 5 in all testing periods and for all hotel categories. Personal commentaries point to satisfaction with positive attitude of the hotel staff (smiling, knowing some Japanese words, appropriate saluting and similar). Professionalism of the staff was graded with 49% of the highest grades.

Survey results point to 2 biggest advantages and disadvantages in Croatian hotels:

ADVANTAGES	DISADVANTAGES
Kind staff (all categories)	Inadequate service for Japanese guests (all categories)
Professional staff (higher categories)	Fully inadequate complaints system (primarily higher categories)

When estimating if Croatian hotels are ready to accommodate Japanese guests, 51% of subjects gave it two maximum grades. A lot of improvement can be done in this area.

From her practical experience when cooperating with most Croatian hotels and a large number of Japanese agents and visitors, the author noticed the following disadvantages in Croatian hotels:

- unwillingness to adjust to Japanese tourists
- Insufficient managers awareness of this adjustment
- profit before quality
- inconsistency in the service confirmed
- bad communication between the sale department and front desk (reception)

The service can be improved the most here, particularly since Japanese tourists are among most preferred guests in hotels because of their discipline and neatness.

3) Group of questions – restaurants

Besides hotel accommodation, catering makes the major part of the offer in organized tourist travels.

The survey covers restaurants of all categories in four towns, ranging from more modest catering establishments to luxury restaurants ready to provide first-rate culinary service.

Object category is correlated with the service level in restaurants. Higher category restaurants are readier to receive Japanese visitors and regularly offer more adjusted service than simpler objects with cheaper service. The first evaluation regarding professionalism of restaurant staff was graded with 4 or 5 by 57% of subjects; 43% graded it from 1 to 3. Considering the category of restaurants visited by the subjects, lower grades were regularly given to cheaper objects. This shouldn't be an excuse.

The adjustment of a restaurant product (menu) with expectations was graded high by the around 61%. This confirms two facts: Croatian restaurants adjusted their cuisine to Japanese guests and Japanese prefer the taste of the original Croatian cuisine. Personal comments in this category show that Japanese hold the Mediterranean cuisine to be delicious and that Croatian restaurants (regardless of category) do not give enough attention to details (decorations). There is a positive trend about the quantity of the food offered. In the first year of the research, only 33% of subjects estimated this category with higher grades, in second year 46% while in the last year 60% of subjects held the quantity of food matches their expectations.

55% gave two highest grades to the courtesy of the staff while the remaining 45% gave it a 3 (not a single subject gave it a 1 or 2). It is important to mention that courtesy category is correlated with the category of the catering object thus leading to the conclusion that more expensive restaurants invest more in educating their staff.

The readiness of the restaurants visited to serve Japanese guests was given two highest grades by 54% of subjects. If we compare the results chronologically and by restaurant category, positive growth is noticeable with the lower category which is indicative and points to that fact that even the owners of cheaper objects realized the importance of quality.

4) Group of questions – tourist guide

Tourist guide is a very important component of organized trip since they are the first and original contact between the visitor and the country they came to; as a rule, the guide leaves the first impression and transfers authentic impression about their country.

Quality elements for tourist guides:

1. Knowledgeable and constantly improving
2. Communicative
3. Speaking foreign languages
4. Resourceful, flexible
5. Sincere, ethical
6. Experienced
7. Cheerful, witty, animator
8. Kind, patient, tactful
9. Tidy, of pleasant appearance
10. Helpful, always ready to provide information
11. Calm, controlling oneself, having sense of proportion
12. Predicting and planning everything

13. Liking their job
14. Giving equal attention to all, personal approach
15. Remembering guests, having good memory
16. Punctuality and responsibility.

Source: Ivanka Avelini Holjevac, Upravljanje kvalitetom u turizmu i hotelskoj industriji, 2002

Japanese visitors find several elements important: helpfulness, punctuality, responsibility, tidiness and dedicating same attention to all tourists. For the needs of this survey, most guides evaluated were from English speaking area. Since Japanese tourists don't speak English well, they prefer guides in their mother tongue; however, since Croatia has only several licensed guides in Japanese of questionable (non) quality, most Japanese tourist meet Croatian guides touring them in English. The language barrier still remains, but the presence of the group attendant can help with possible lack of clarity.

Japanese tourists are interested in culturological and natural heritage, but due to their regularly very busy programmes allowing them short and superficial sightseeing, they prefer visiting many attractions in a brief time to detailed knowledge and information. Therefore it is recommended that guides have such knowledge to be able to adjust their guiding service to the group they work with. 82% of subjects estimated the first category with the highest grade which points to attraction of Croatian destinations. Free comments point out that Japanese tourists hold natural attractions to be most interesting while the best graded towns were Split and Dubrovnik.

In the first year of the research, most Croatian guides were graded 3 or 4 by 59% of subjects, the following year 49% of guides were graded 4, while in the third year almost 44% got the highest grade because the increasing arrival of Japanese tourists enabled guides to gain more experience and adjust to the specific service. First year of research did not bring very high grades to guides despite agents engaging their most experienced guides, all due to difference in expectations. As expected, year and year out, grades for tourist guides were increasing leading to 43% subjects giving the highest grade to guides in 2008.

As with first two groups of questions, cordiality and cheerfulness were estimated high: in overall survey, 76% of subjects gave it a 4 or 5, while in the very beginning the estimate of the experience in working with Japanese guests was weak. In first two research years, punctuality and appropriate appearance and clothes were not graded significantly while in 2008 around 42% of subjects were very pleased with this category as well. When considering survey results from territorial aspect, higher quality level was given to tourist guides from Split and Plitvice area.

5) Group of questions – transport service

Japanese tourists prefer safety when travelling. Even the smallest risk will result in dissatisfaction and complaints. Drivers are expected to be professional, kind and behave adequately. Japanese tourists believe drivers are in their service and expect them to do everything they can to reach expected standards of safety and service quality. In the first research year, grades given for transport service were critical, not due to bad quality or an old means of transport, but because of completely unadjusted service. In the first

year, around 68% of subjects gave this service category 2 or 3. Drivers were most frequently and most severely criticized (speeding, talking on cell phone when driving, inappropriate clothes and appearance, dirty busses, not understanding foreign languages). Croatian drivers started adjusting their service to tourists' requests and were accordingly evaluated better in next years. In 2008 drivers professionalism was graded 4 or 5 in almost 70% of cases while kindness and appropriate appearance has a very good grade in more than 79% of cases. Around 68% of subjects estimated the transport service to meet the expectations very well.

CONCLUSION

Japanese tourist generating market has entirely opened to Croatia several years ago and has recorded an impressive number of arrivals and room/nights. This market is interesting since Japanese travel throughout the year and use full service. Potential of this market is still big and despite announced financial crisis, further growth of their arrivals is expected.

To make our destination long-term competitive, we need to focus on quality and adjust our services to tourists' expectations to the maximum. This paper shows specific expectations of Japanese tourists which tour operators need to accept and adjust to. The objective of travels is to meet different cultures and experience something different than usually. Still, some groups of tourists have their view of quality and the only way to please them is to meet their expectations as much as possible. In the process, we need to keep sense of proportion and make sure adjustments do not affect authenticity of the Croatian product that Croatian tourism is based on.

Many actions related to this have been started. Tourist Boards from specific tourist centres as well as the Japanese Embassy in Croatia have organized courses on how to serve Japanese guests which is a good beginning. Efforts have to be even bigger to raise the awareness of small entrepreneurs and local population as well.

The research was implemented in the period of three years so certain deviations were noticed. It turned out that, year and year out, results were increasingly positive pointing to positive changes in the service quality. It can be expected that with intense arrivals from Asian market product and service providers in tourism will adjust their products and services to Japanese specificities. Although research results point to a positive growth, we should not forget the fact that there is a huge area for progress and concentrate on planned increase of service quality.

This paper can be a frame guideline and a base for further research in this area.

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