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Undergraduate thesis / Završni rad

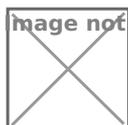
2018

Degree Grantor / Ustanova koja je dodijelila akademski / stručni stupanj: **RIT Croatia / RIT Croatia**

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Overcoming barriers to Asian market development in Dubrovnik

Is the hospitality industry of Croatian coast ready for Asian tourism boom?

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Abstract

According to Dubrovnik Tourist Board, a large increase in visits of Asian tourists has been noticed in the recent couple of years. As up until now, the Croatian coast hospitality industry was mostly used to seeing large numbers of tourists from neighbouring countries as well as Croatian nationals, this type of tourist demographics is a big difference and comes as a shock to the industry.

The aim of this paper is to examine whether the hospitality sector of Dubrovnik is prepared for this shift and suggest what areas of the sector need improvement in order to accommodate the change that is happening and secure Dubrovnik a spot among the other top European tourism destinations. The hypothesis is that Dubrovnik's hospitality aspects aren't satisfactory enough to keep up with the growing numbers and demands of guests from Asian area, and it is the goal of this paper to confirm or refute this. Another goal is to find out which aspects the industry should put the most focus on when trying to meet the needs and wants of these tourist groups.

The research method that was applied for this paper was a survey, that was distributed among Asian tourists in Dubrovnik in order to measure their experience as tourists in Dubrovnik. The results of the survey confirm the hypothesis and suggest that the strongest opportunity is the fact that Dubrovnik is safe, and the largest weakness is the absence of shopping possibilities. The coinciding result, however, suggests that safety is the most important aspect for Asian tourists, and shopping possibilities are least important. Other findings from the survey are discussed in the paper as well.

Key words

"Asian tourists", "Croatian hospitality industry", "Tourism in Dubrovnik", "Tourist demographics shift"

Introduction

As far as the quantity of visitor entries, Croatia can't quite contrast other European tourism powers like France, Spain, Italy or Greece. However, with a pattern of growth that it has had in the past seasons, Croatia has surely become a standout amongst the most prevalent touristic coasts on the Mediterranean. Many factors might have influenced the increasing popularity of the Croatian coast, however, statistically, this may very well be due to the recently increased number of tourists from Asian countries such as South Korea, Japan, India and China. Such tourism demographics are something very new for Croatia, considering that throughout the country's history, prevalent visitors at the coast during the season were mostly Europeans.

Throughout the advancement and constant changes of travelling destination trends, the demographics of tourists that are considered as regulars at those destinations changes, too. A destination that was once famous among visitors from one geographical background, won't really be well recognized among individuals in the same area in years later. The city of Dubrovnik specifically is one of those touristic cities where the difference in regular, seasonal visitors during the past years has been apparent. The statistics from Dubrovnik Tourist Board indicate that, despite the numerous European visitors, the quantity of Asian visitors is expanding every day, and this is showing no signs of turning into a decline any time soon.

History of tourism in Dubrovnik

According to the Croatian National Tourist Board (2016), the tradition of organized tourism in Croatia goes back to around 150 years ago, though even before that, toward the start of the nineteenth century, a few types of movement like tourism existed, (for example, journeys or treks to spa). Therefore, the motels, lodgings and spas that were introduced for such purposes in the past were all located in the North of Croatia. In the time between the two

wars, tourism in Croatia got a lift, and obligatory vacationer charges were presented, trade workplaces were open and visitor audits issued, and local and worldwide air courses built up.

Tourism is a lucrative movement, particularly at the seaside in the mid-year -- the summer season. In Croatia, there is a division of every single monetary movement into "in season" and "out of season" ones. The summer visitor season, which primarily keeps going from the earliest starting point of June to the finish of September, is the primary boost for the advancement of this, the most appealing territory for vacationers. While in the County of Istria, tourism is created as far as foundation, the mainland areas represented a small minority of the aggregate number of nights spent. Convenience is circulated by these figures, for the most part along the Adriatic drift.

Tourism promotion has unquestionably prompted an expansion in enthusiasm for Croatia over the previous decade. However, there are also other factors that might have influenced this: the adjustment in the structure of voyagers as far as nation of cause, the expansion of new visitors, presentation of low-spending airlines, and an assortment of types of less expensive convenience for sightseers with bring down buying power. With the improvement of traveling routes, and the opening of marinas and expansion of their abilities, Croatia is growing by an expanding number of guests with more prominent acquiring power each year.

According to the Croatian National Tourist Board (2016), this is additionally appeared by a few things that have been going on finished the previous decade, for example, the mentioning of Croatia in an expanding number of articles in driving world magazines and other media adulating its characteristic attractions; the conspicuous ascent in the quantity of visitor landings from a developing number of producing nations; the noteworthy offer of tourism in the aggregate GDP of Croatia; the ascent in the quantity of objects of ensured

substantial and non-unmistakable social legacy; the expansion in interest in tourism and assistant foundation; the expanding assortment of what is on offer for travellers, and so forth.

Changes in touristic demographics

From 1980 to the present, the extent of remote travellers is more noteworthy than residential guests, and the customary guests are from Germany, Slovenia (prior considered local visitors), Austria, Italy, the Czech Republic and Slovakia (the previous Czechoslovakia). In the previous ten years, the quantity of visitors has expanded from France, the Netherlands, Poland, yet additionally from abroad nations.

According to CTA (2016), last year, around 60 percent of Chinese visitors went without anyone else, as indicated by a report by advanced travel office Ctrip and the China Tourism Academy. An average Chinese traveller is in their forties and earns between 650 and 1300 euros; they travel in organized groups and their main motive for travelling is sightseeing.

Keeping this in mind, we can note that an Asian tourist is very different from the European tourists from neighbour countries that Croatia has up until now been used to. This is just one among the reasons why Croatian tourism has been and will undoubtedly continue to change and adapt to the demand in the following years. The cultural differences among the different tourists' nationalities will, no doubt, lead to some changes in what Croatian tourism has to offer.

Popular destinations for Asian population

As stated by Reisinger and Turner (2003), effective tourism requires more than making great transportation, lodgings, and resorts available for guests. Rather than that, it blossoms with a soul of hospitality, and that specific traditional aroma that offers an ideal picture to guests who then invest into the local goods and services.

Europe, in general, falls behind Asian contenders — Thailand, South Korea, Japan, Singapore — in drawing in Chinese vacationers. With the United States in 6th place, just three EU nations positioned among the main 20: Italy, the United Kingdom and Germany. Surprisingly, tourism powerhouses, for example, France and Spain don't make the cut, as per Ctrip's positioning.

According to European Travel Commission (2016), just around 10.2 million Chinese went to Europe in 2016. By differentiate, around 18 million British vacationers made a trip to Spain in the same time period. That year, the quantity of Chinese travellers picking Europe developed by 2 percent, while the quantity of outings developed by more than 4 percent. This means the continent lost piece of the overall industry against its rivals. That is a circumstance governments and organizations in Europe are anxious to settle.

Cross-cultural behaviour of Asian tourists: multilingual competence and cross-cultural dialogue

Asian travellers have recently become the major source of global outbound tourism. These culturally distinct guests are the quickest developing market when it comes to travelling and tourism. Considering that up until now, Croatian locals and hosts have mostly had experience with the guests from neighbouring countries or other parts of Europe, switching to having mostly Asian guests is naturally a great change that will require some adapting.

According to Reisinger and Turner (2003), culture is a complex, multifaceted marvel that is hard to explain completely, and the fact that there are several hundreds of definitions for it in literature, mirrors this. Nowadays, as globalization advances, various cultures are also being united to a continuously increasing extent, creating even more subcultures that are even more difficult to explain and define. When it comes to tourism, we talk a lot about

human interaction – between guests and hosts, or often simply between tourists and locals.

Human interaction is something that can define, in a positive or a negative manner, a country in the eyes of a traveller faster than a stunning view or underperforming accommodation staff. And when it comes to human interaction, culture is something that can make or break the impression you get from a person. Understanding this is the first step towards successful interactions with foreigners.

When it comes to Asian tourists in Croatia, the cultural differences are obviously widely present. One basic societal difference that the western world and Asian countries have is individualistic versus collectivistic culture. Asian communities work in a collectivist nature – they stick together, identify themselves with groups of similar people, do not like to stand out, and prefer working and solving problems in groups or teams. On the other hand, the western society that Croatia is a part of, works better individualistically. Members of this type of culture like to stand out and act on their own, work individually, and do not like being overly associated with a certain group. It is clear how these differences on their own could affect the interaction between Asian guests and Croatian hosts, oftentimes creating confusion where there would be none, if the participants were a part of the same culture.

According to Kim and Mattila (2011), language obstructions can trigger negative emotional reactions from clients and keep them from looking for information or even complaining about inadequate service. While it may be argued that one would anticipate from a visitor to know more languages than a local person, in the end, this obligation falls on the service worker. All things considered, the person who pays is a customer, and in this manner expects the best experience possible. Living by this rule is a helpful tip when working with travellers from Asian countries. According to VoiceBoxer (2016), the percentage of English-speaking population in China is as low as 22%. Out of 1.37 billion people that the total

population consists of, only 10 million is proficient in English language. This can easily be applied to other languages as well.

As indicated by Kostic Bobanovic and Grzinic (2011), possessing the ability to speak English as a foreign language can help build a representative's basic reasoning and critical thinking abilities. Same can be claimed for any other language that is not a mother tongue. Communication skills are an imperative component of the tourism industry. Comprehension of the guests' desires is the key to the accomplishment of visitor fulfilment and happiness. Great language abilities are the best aptitudes critical to a good host, and this can be applied to any various position in the industry.

Asian travellers have recently become the major source of global outbound tourism. These culturally distinct guests are the quickest developing market when it comes to travelling and tourism.

Methodology

The chosen research method for this paper was a survey, as this approach allowed for a broad capability of describing the experience of a large population. The anonymity of this method allowed for the participants to be more candid with their replies and the opinions they express, hence the results are more reliable. It was very important to carry the survey out quickly and effectively, and the goal was to get as many tourists that fit the demographics relevant to this paper to participate. The aim for the sample size was at least one hundred participants, therefore a survey was the most affordable and appropriate design for getting the necessary results.

The survey was distributed across many hotels in Dubrovnik, to Asian tourists who have already spent at least some time in Dubrovnik in order to be able to get the most relevant results. The tourists who were surveyed were divided into five age groups, ranging from 18 to 25 years of age, and 65 years of age and above.

The purpose of the survey was to measure both the perceived importance and the satisfaction of the following aspects of the surveyed tourists' stay in Dubrovnik: personal safety and security, cleanliness of facilities, politeness of local people towards the group, shopping possibilities, food offer, climate and weather, and interaction/conversation with local people. The above-mentioned questions were posed as such, so that the participants could grade their satisfaction with the specific aspect of their stay in Dubrovnik as well as the importance of that aspect on a scale from one to five; one being completely dissatisfied/irrelevant, and five being completely satisfied/of a crucial importance.

The participants were also asked to rate their overall experience in Dubrovnik on a scale from one to five, one being completely dissatisfied and five being completely satisfied. Other questions in the survey required the participants to indicate their gender, whether it is

their first time in Croatia, and how many nights they are staying in Croatia. In addition, the survey included an open-ended question, which asked the participants about their country of origin. A space for any additional comments or suggestions at the end of the survey was also provided. This is an important part of the survey, as it allows for a clearer insight into the aspects that Asian tourists are satisfied with, or aspects that they would like for to be improved. Hopefully, this section of the survey should provide some insight into the wants and needs of this tourist population.

Results

The survey was distributed in 106 samples in hotels and on the streets of Dubrovnik to Asian tourists. Even though this was initially not planned, the unforeseen circumstance of Asian tourists not being very open to taking the survey has forced the authors of the paper to seek other places where it might be easier to get the people to participate. Therefore, the survey was also distributed in the tourist buses going to excursions. A total of 100 surveys were valid and could be used in the research. The remaining six surveys were not fully and/or clearly completed and were therefore omitted from the sample size.

The gender of the respondents was quite equally distributed with a ratio of 53:47 in favor of women. Dividing participants by age, the smallest group was the youngest one, with only three participants aged 18-25. The age of the majority of participants was between 26 and 35, with thirty-nine participants in this group, while the second largest group was an older one, with twenty-two participants aged between 56 and 65. Fifteen participants were aged between 46 and 55, and ten were older than 65.

There was an open-ended question in the survey, asking to state the participant's country of origin. The countries that participants are from were Singapore, Korea, China,

India and Japan, with the majority of participants being from Singapore (30%), and the least participants from Japan (16%). The other countries, India, Korea and China, were written down by a smaller number of participants as well: 19%, 18% and 17%, respectively. The results gathered from this question were interesting, as Singapore, being the most frequently listed country, is also the smallest among all of the countries that were listed. However, it is also among the richest, which does give an insight into the type of Asian tourists who visit Dubrovnik.

Majority of respondents were visiting Croatia for the first time, with only twelve having visited Croatia at a previous time. Twenty-four participants were staying in Croatia for more than three nights, with the majority (sixty-one participants) staying in Croatia for three nights. Twelve respondents stayed in Croatia for two nights, and no-one stayed for only one night. When it comes to the comments and recommendations that the participants were able to provide in the last section of the survey, the amount of responses was quite disappointing, but also expected. Only three participants wrote something in this section. Two of the comments were asking for Ice Americano coffee, and one comment simply stated that the level of customer service needs to be upgraded. Even though only three responses were recorded, this was expected due to the language barrier and the general response to the survey which was not very keen to begin with.

The following question in the survey required for the participants to indicate to what extent a certain segment of their trip to a destination is important on a scale from 1 to 5. "1" represents "not important at all", and "5" represents "of crucial importance". The segments that the participants were rating are personal safety and security, cleanliness of facilities, politeness of local people towards the group, shopping possibilities, food offer, climate and weather, and interaction/conversation with local people. The segment of the trip that is rated as the most important by the majority of sample is personal safety and security, with an

average of 4.85 on the scale from 1 to 5 and, coincidentally, the smallest standard deviation of just 0.36. This shows that it is correct to state that the majority of the participants of the survey agree in that safety is the most important part of their holiday. The least important segment of the holiday, according to the survey results, are the shopping possibilities of a destination. This segment had a mean of 4.01, but also coincidentally, the highest standard deviation of 0.89. This standard deviation, even though it is the highest when compared to other standard deviations calculated for this question, is still quite low. This shows that even though there is a slightly larger range of disagreement, the participants still agree in their answer to this question. Among the less relevant segments were climate and weather, food offer, and interaction/conversation with the local people. Among the more relevant were cleanliness of facilities and politeness of local people towards their group.

The next question was the same type, so the respondents had to indicate to what extent they were satisfied with the same, aforementioned segments of the trip that they have previously rated the importance of. On a scale from 1 to 5, "1" represented "completely satisfied", and "5" represented "completely dissatisfied". The most highly rated segment was personal safety and security, with an average of 4.36. The lowest score was 3.05 indicating importance of shopping possibilities at a destination. What is interesting to note is that standard deviation on this question was quite high for every offered response, meaning that the participants had quite a different opinion of their experience in Dubrovnik so far. When it comes to the overall impression Dubrovnik has left on the participants, the 1 to 5 grade that the survey results show is 4.12. Among the most satisfactory segments of their holiday, the participants rated cleanliness of facilities, and climate and weather the highest. Among the lower ratings were politeness of local people towards their group, conversation/interaction with local people established, and food offer.

When dividing the participants' ratings of overall satisfaction of their holiday in Dubrovnik by nationality, the survey found that the most satisfied were Chinese nationals (average overall satisfaction score of 4.65), closely followed by Japanese nationals (average overall satisfaction score of 4.63). Singaporean and Indian nationals both gave an overall satisfaction rating of 4.0, and by far the lowest rating was given by Korean nationals (3.5).

When it comes to dividing the ratings of importance and satisfaction of the specific aspects of Dubrovnik hospitality, the Chinese participants rated safety as most important with a score of 5.0, and shopping possibilities as least important with a score of 4.0. They were most satisfied with cleanliness of facilities (4.82), and least satisfied with shopping possibilities and their interaction/conversation with local people (3.59).

Japanese participants consider climate and weather, and interaction/conversation with local people as most important on their holiday (4.81). Interestingly, safety and food offer were rated as least important with a score of 4.44. Safety and cleanliness of facilities was rated as most satisfactory on their holiday in Dubrovnik (4.88), and shopping possibilities were rated as least satisfactory (2.63).

Korean participants found politeness of locals as most important aspect of their holiday (4.83), and shopping possibilities as least important (4.17). For them, safety was the most satisfactory aspect of their holiday in Dubrovnik (3.67), and shopping possibilities the least satisfactory (2.67). It is interesting to note that out of all participants, Korean nationals gave the lowest ratings for each satisfaction aspect.

Participants from Singapore have stated that safety is the most important aspect of their holiday (5.0), and interaction/conversation with locals is the least important (4.0). The most satisfactory parts of their holiday in Dubrovnik were safety and security, and cleanliness of facilities (4.1).

Lastly, participants in the survey from India have rated safety and security as the most important part of holiday (5.0), and shopping possibilities as least important (3.32). They were most satisfied with safety and security during their stay in Dubrovnik (4.68), and least satisfied with shopping possibilities while on their holiday.

Discussion

So, is the hospitality industry of the Croatian coast ready for the booming of the Asian tourism? Namely Dubrovnik, being one of the biggest attractions in Croatian hospitality, is a good example for this, which is one of the reasons the survey conducted in this city makes it a relevant indicator for the entire coast. While there might be differences in popularity of other places as Dubrovnik is the main destination for the Asian tourist population, it is only a matter of time until other Croatian coastal regions gain more popularity.

Reviewing the methodology for this paper, one of the main barriers between the researchers and the participants of the survey was the language of communication. The sample that was necessary for this research paper in order for the results to be relevant had to be tourists from an Asian country, and the language used in conducting the survey and the entire research paper was English. Therefore, interestingly enough, one of the indicators showing how big the language barrier is the fact that it was really difficult to gather data from the Asian tourists who were targeted to be participants in the survey. They found it difficult and time-consuming to understand and answer the questions that were posed, and they would mostly decide that they would not bother. The surveys used in this research paper were therefore also distributed on touristic buses. The surveys were distributed and filled out during the time that it took for the bus to get from one place to the other, and since the

passengers did not have much to do during the bus ride, they were then more willing to fill out the survey and put in more effort to pass the time.

Going into the results of the survey itself, what is interesting is that they show that the segments of holiday which are most important to the participants, were also the most satisfactory ones. In the same manner, the segment of the least perceived importance, shopping possibilities, was rated as the least relevant from all the other answers. Asian tourists who visit Dubrovnik are fairly satisfied with the entire experience of their holiday on the Croatian coast, but the survey conducted shows that there are some aspects the hospitality industry of the area should work on in order to stay relevant during the Asian tourism boom that is happening.

Employing hospitable and enthusiastic staff who will find the right balance between being professional and respectful, but also open and kind to the guests is a hard task, especially when it comes to the cultural differences of the Slavic people that are providing the service in Dubrovnik, and the collectivist behavior that Asian tourists display as a part of their culture. As mentioned in the introduction of the paper, a great gap between these two groups of people is created by the difference in collectivist versus individualist approach to life and self-perception. A collectivist culture that Asian tourists are a part of, assumes always sticking together, not wanting to stand out, and working in groups. The western, individualist culture, assumes standing out and acting on your own as a more positive and desired trait in a person.

This on its own can create a gap between understanding why one group is acting so different than the other, and the survey results support this. The areas that the Dubrovnik hospitality experience was most criticized for in the results of the survey was the politeness of locals, as well as the communication and interaction established with the locals. People

from the Slavic area can often be perceived as cold, when in reality this is just one of the cultural differences between these two very different cultures. As established in the introduction of this paper, possessing the ability to speak a foreign language helps improve the overall communication skills of the individual in question. This does not only encompass spoken communication, but also body language and facial expressions.

Learning a foreign language, or at least trying to learn some phrases in the native tongues of your guests, can improve the overall image that is left on the tourists once they leave a destination. If a tourist is left with a good impression, it is more likely that they will come back to visit again, and this is an amazing concept as it creates loyal tourists who keep on coming back to a destination.

When it comes to deciding which languages to put the most focus on, as learning all of them would be too demanding, we can let two things guide us: either the number of tourists from a specific country, or the level of demand that those tourists display. The logical thing to do would be to simply determine which Asian country brings the highest number of tourists to Dubrovnik, and then focus on their native language in order to receive the biggest number of positive ratings. The other solution would be to focus on the most demanding guests. The results of the survey showed that Korean tourists were the most demanding and had the highest standards when it came to rating their satisfaction with their holiday in Dubrovnik. In this case, it would be best to focus on Korean language in order to satisfy the most demanding guests, and avoid the lowest ratings that this group of tourists would give.

Of course, this decision will depend on many more aspects such as whether the workforce that is available is willing and capable of learning such complex languages that are in so many ways different than the Slavic language group that Croatian language belongs to. This is very important as the workers should be keen to learn the languages in order for the

learning to go as fast and smoothly as possible. Even if the workers actually do learn a language, or a few phrases in a language, a question is posed of whether they will be comfortable enough to use this new knowledge with the guest. Another limitation is the correct pronunciation: if a foreign language is spoken unclear or with an odd pronunciation and accent, the phrase that wanted to be communicated can be misunderstood and interpreted as rude or simply irrelevant. That is why learning the phrase fully correct is crucial in order to be able to communicate in this group of foreign languages. Something that should definitely be further investigated is the willingness and ability of the Croatian hospitality workforce when it comes to learning complex foreign languages.

A limitation for employers in the hospitality industry in Croatian coast may be the cost of the language course and the extra cost of the workforce which would have to be paid for taking language classes, as well. The readiness of the employers to take such steps should also be considered, as it is unclear whether they will recognize this cost as an opportunity for meeting the needs and wants of these growing tourist groups. The availability of such language courses specifically for Asian languages in Dubrovnik is also unknown, and this is something that should be further investigated.

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Appendix 1.

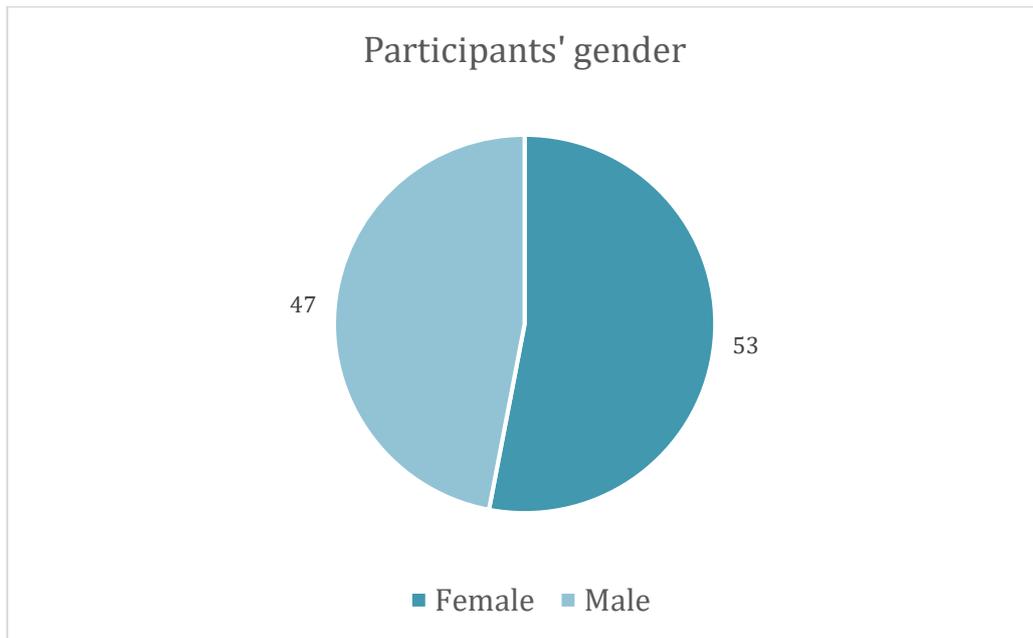


Figure 1. Gender of participants. Created with survey data for this research paper.

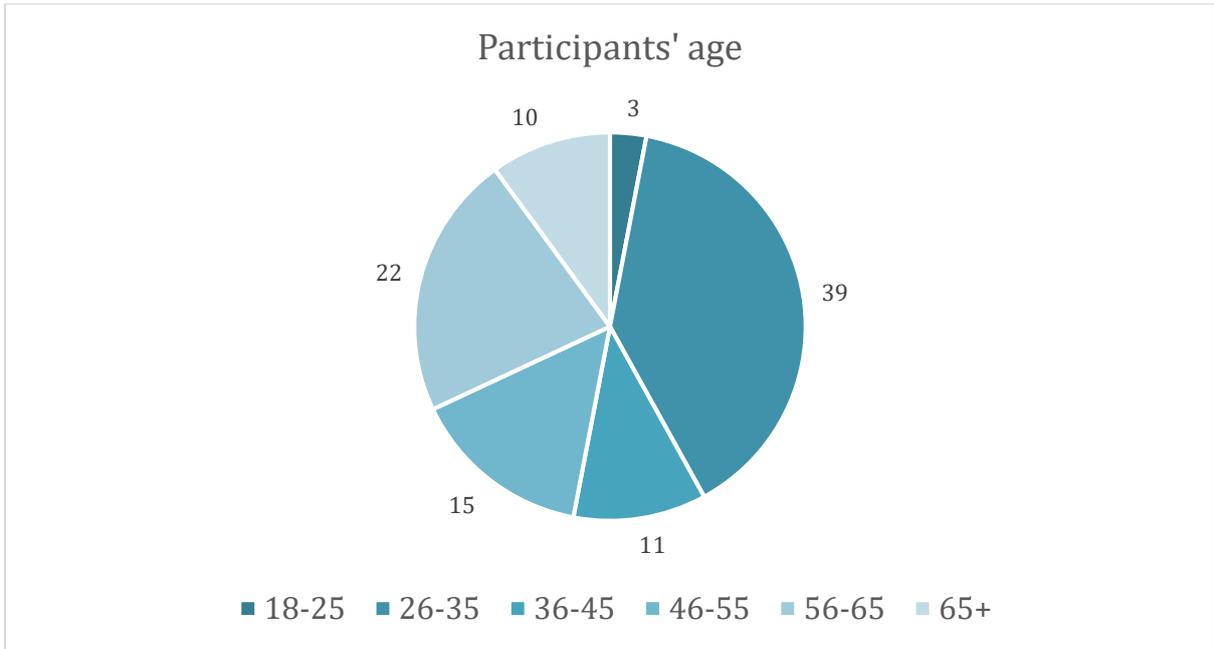


Figure 2. Age of participants divided in specific groups. Created with survey data for this research paper.

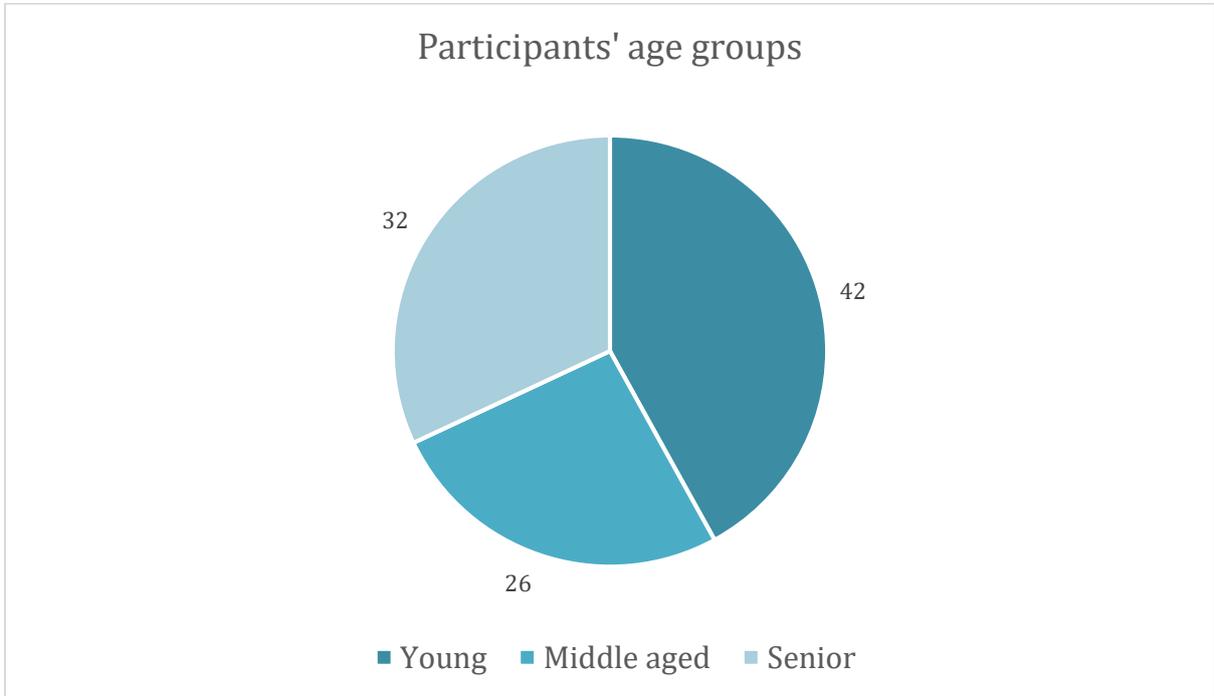


Figure 3. Age of participants divided in general groups. Created with survey data for this research paper.

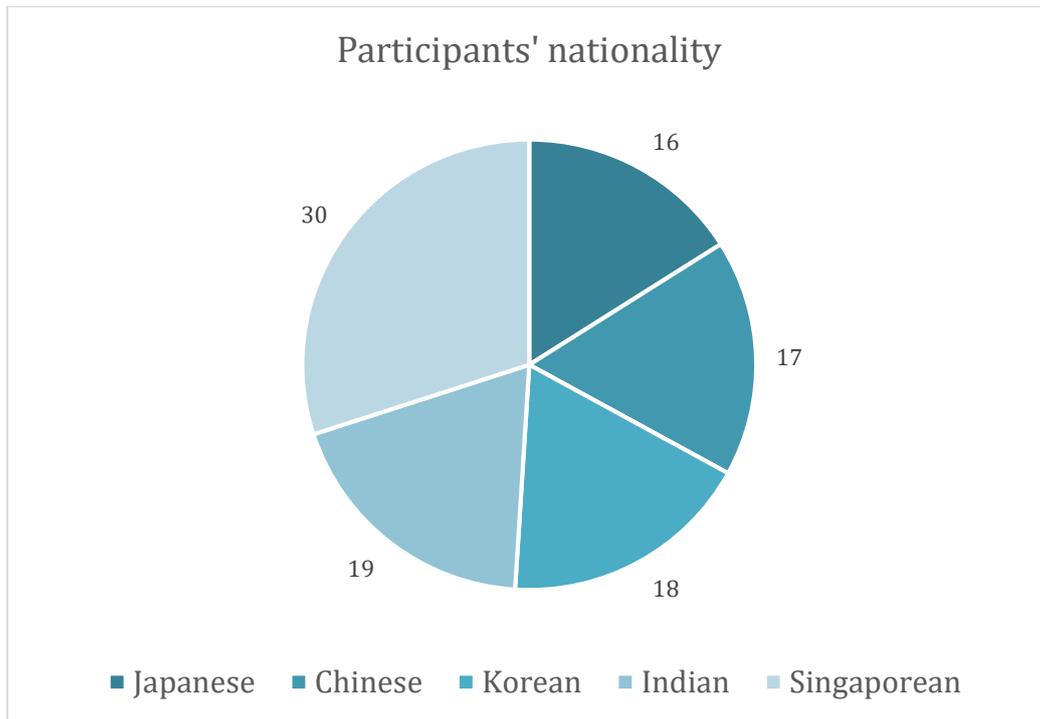


Figure 4. Nationality of participants. Created with survey data for this research paper.

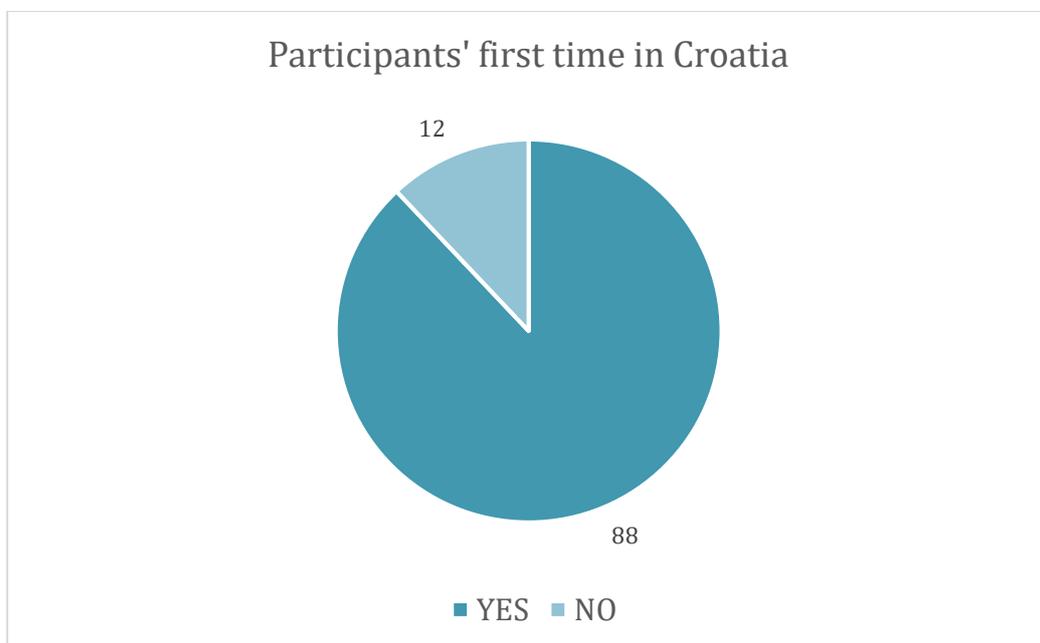


Figure 5. Percentage of participants who have previously visited Croatia. Created with survey data for this research paper.

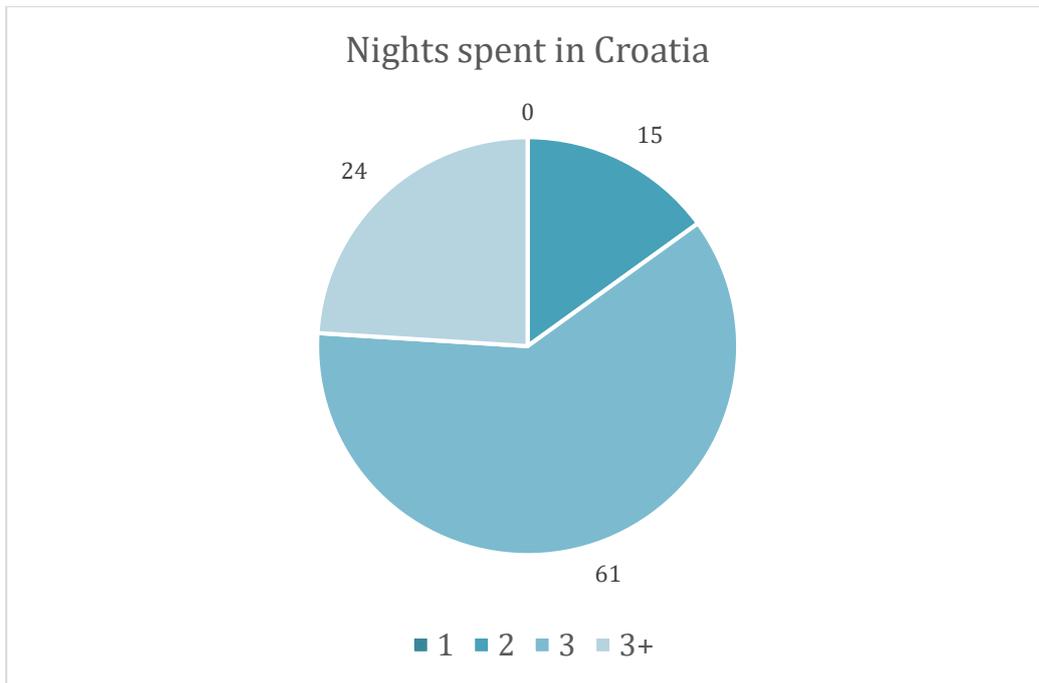


Figure 6. Percentage of nights that participants spent in Dubrovnik. Created with survey data for this research paper.

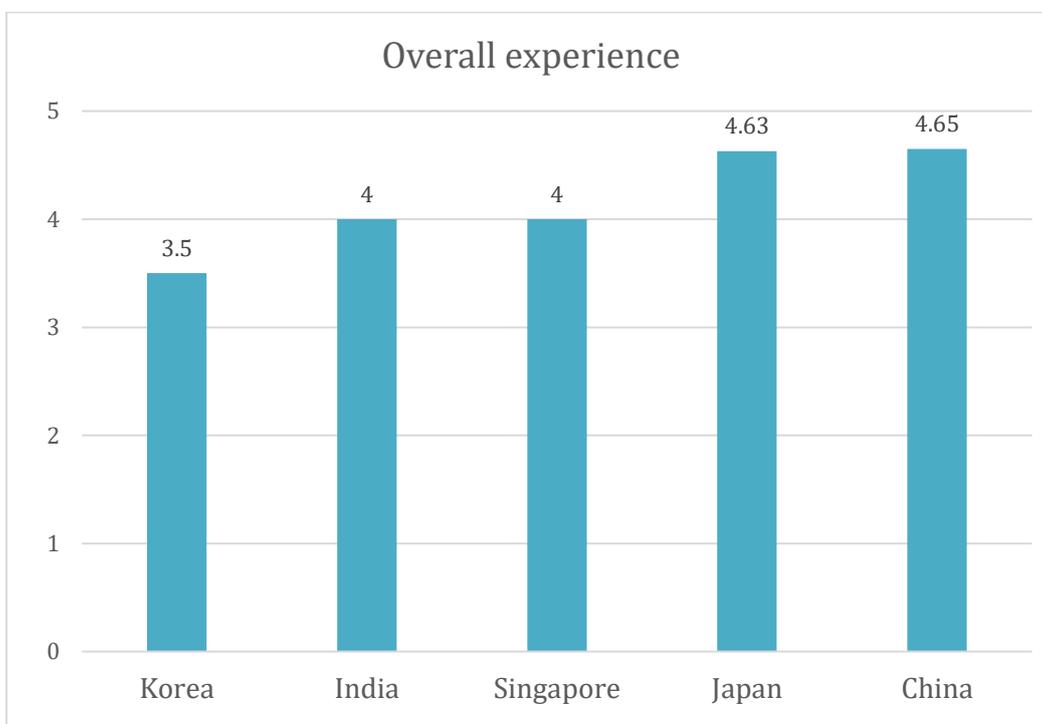


Figure 7. Participants' overall experience rating of Dubrovnik divided by their nationality.

Created with survey data for this research paper.

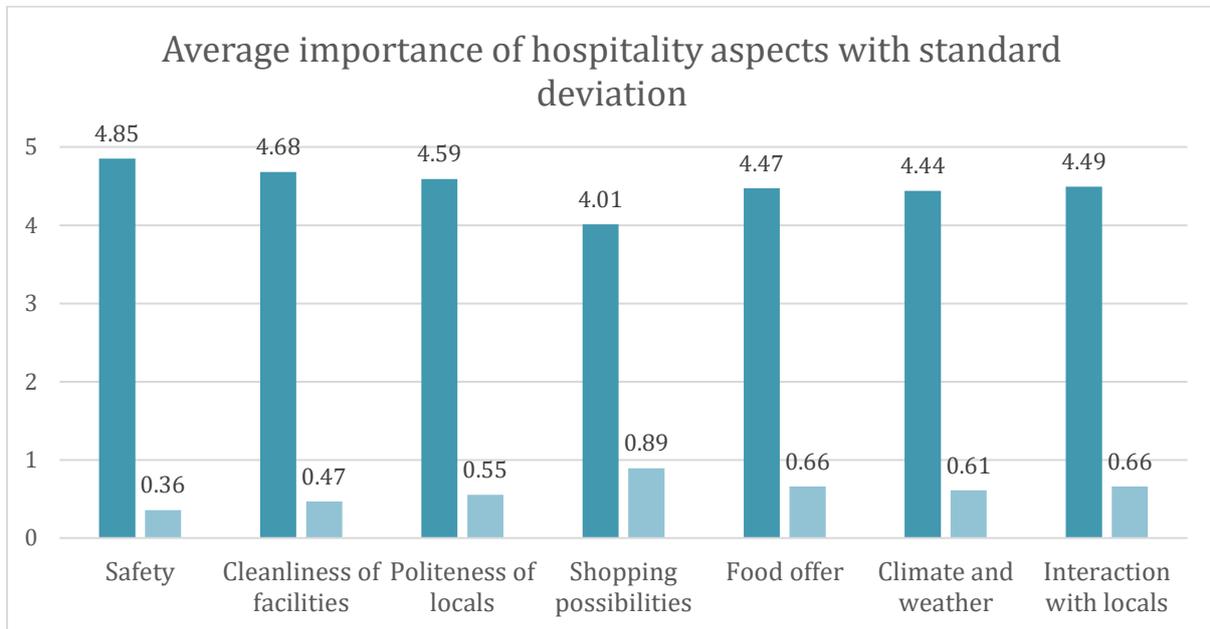


Figure 8. Participants' average rating for importance of certain hospitality aspects in

Dubrovnik with standard deviation. Created with survey data for this research paper.

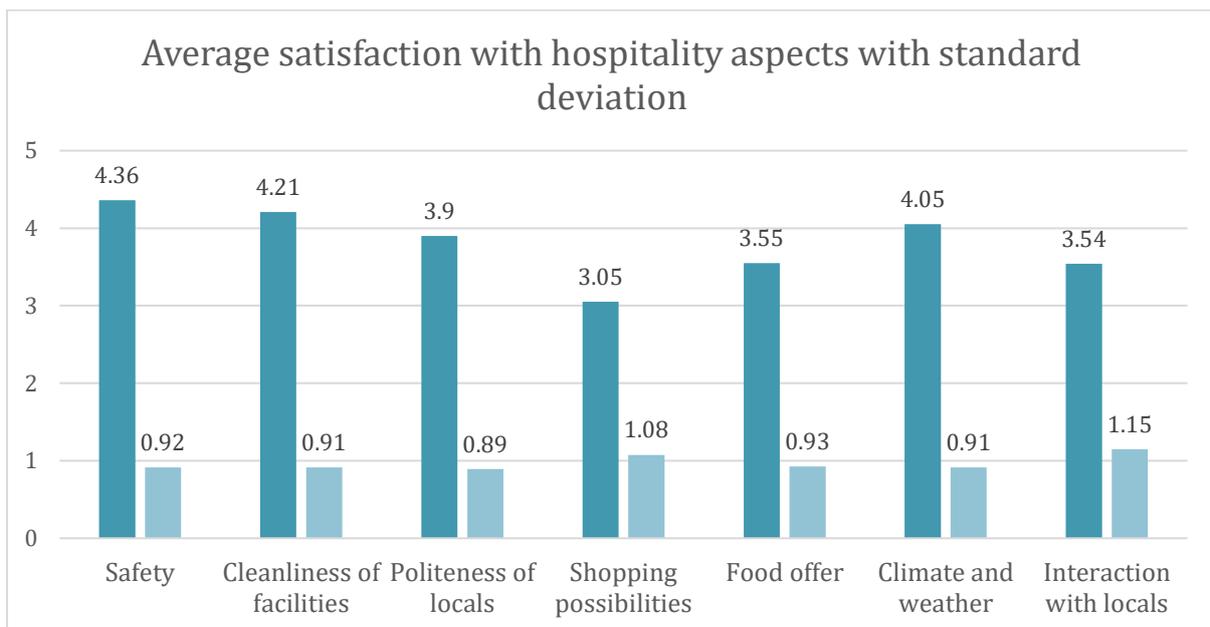


Figure 9. Participants' average rating for satisfaction with certain hospitality aspects in Dubrovnik with standard deviation. Created with survey data for this research paper.



Figure 10. Chinese participants' rating of importance and satisfaction with hospitality aspects in Dubrovnik. Created with survey data for this research paper.

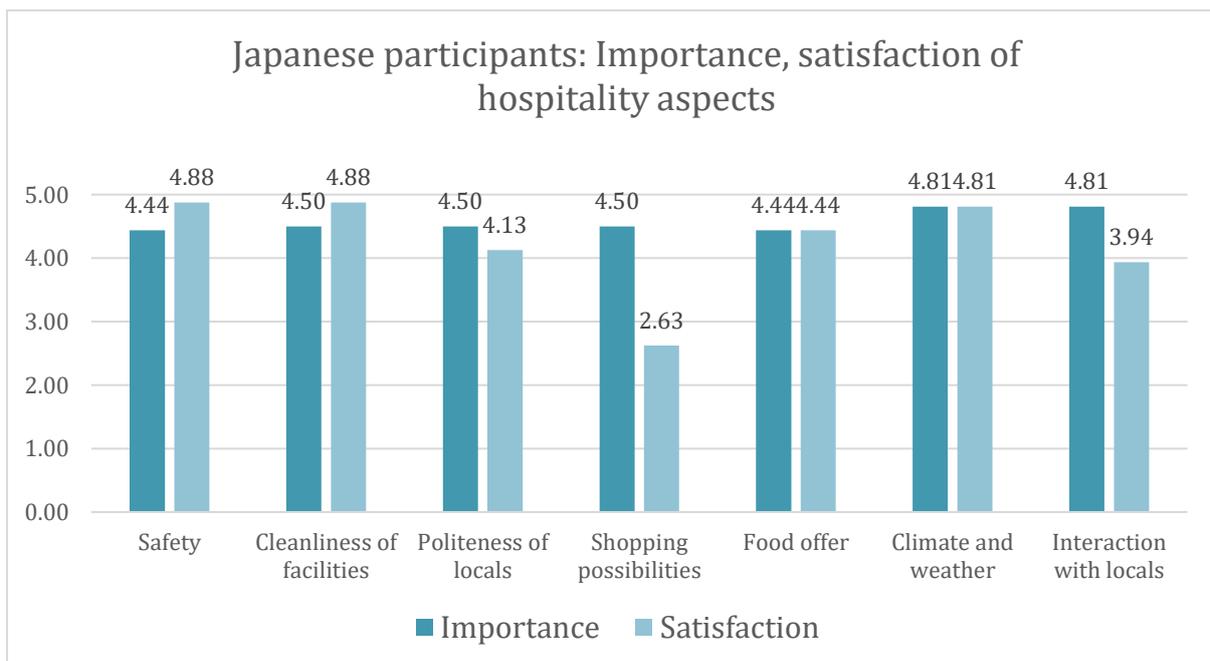


Figure 11. Japanese participants' rating of importance and satisfaction with hospitality aspects in Dubrovnik. Created with survey data for this research paper.



Figure 12. Korean participants' rating of importance and satisfaction with hospitality aspects in Dubrovnik. Created with survey data for this research paper.



Figure 13. Singaporean participants' rating of importance and satisfaction with hospitality aspects in Dubrovnik. Created with survey data for this research paper.

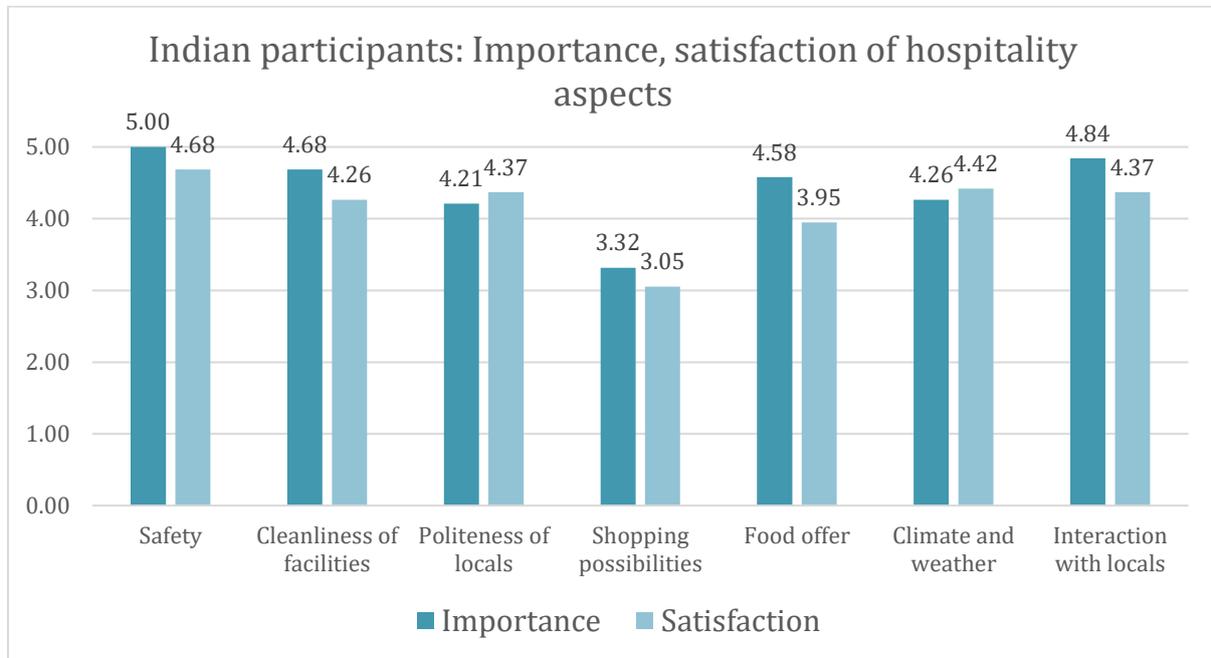


Figure 14. Indian participants' rating of importance and satisfaction with hospitality aspects in Dubrovnik. Created with survey data for this research paper.