



INSTITUTO
UNIVERSITÁRIO
DE LISBOA

**Japanese Income Tourism.
An exploratory study of Portuguese luxury hotel management
strategy (before and after Covid-19).**

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Doctor of Management

Supervisors

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ISCTE – University Institute of Lisbon, Portugal

Prof. Nelson António, Full Professor
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December, 2021



BUSINESS
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This was a journey made through a stone path. I kept all the stones and built a castle, this thesis.

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Abstract

This study examines the service quality of luxury hotels operating in Portugal, identifying the factors behind Japanese customers' satisfaction or dissatisfaction with hotel attributes. The study was based on qualitative and quantitative research methods, taking a four-step approach: first, the relevant literature was reviewed for a better understanding of Japanese culture, Japanese tourists, and the keys to success of Japanese and hotel management; second, content analysis was conducted of Japanese online reviews to compare satisfaction and dissatisfaction with hotel attributes. Chinese tourists were introduced in the study (the Asian tourists of most concern to the Portuguese hotel industry) to analyse the differences among Asian customers. The online reviews of 1.354 hotel guests (538 Japanese and 816 Chinese) were collected from the on-line travel agency "booking.com" for Lisbon, Portugal; third, five top hospitality managers and experts were interviewed; and fourth, 187 questionnaires had been answered by directors and client managers not only in the hospitality sector, but also in other business sectors to collect opinions on "outside the box" strategy, before and after the COVID19 pandemic. The conclusions of the study reveal some common categories for hotels, both positive and negative, that fall into dimensions: Facilities, Market, People, Processes, Financial (included in the "Balanced Scorecard" dimensions). There were also some relevant differences between the Japanese and Chinese regarding their perception of hotel facilities. What, for example, might be classified positively by the Japanese as "historical", may be classified negatively by the Chinese as "old fashioned". Hospitality Strategy, and Japanese tourists' Satisfaction or Dissatisfaction with hotels' attributes were compared and it became clear that a strategic improvement plan should be implemented to meet and/or exceed Japanese tourists' expectations. Recovering the European markets and developing people should be the priority after covid-19. While few studies have been conducted in Portugal on this subject, the Japanese market is proving to be very profitable in other European markets.

This thesis contributes to the understanding of Japanese culture and Japanese tourists' satisfaction and dissatisfaction with the hotel attributes, contributing with a plan to improve the Portuguese hotel strategy in order to conquest and meet the expectations of Japanese tourists.

Keywords: Japanese Culture, Japanese Tourists, Hospitality Strategy, Hotel Attributes, Japanese Tourists Satisfaction.

Resumo

Este estudo analisa a qualidade do serviço dos hotéis de luxo a operar em Portugal, identificando a satisfação ou insatisfação dos clientes japoneses com os atributos dos hotéis. O estudo baseia-se em métodos de investigação qualitativos e quantitativos com quatro fases de abordagem. Primeira, revisão da literatura, compreendendo a cultura japonesa, o turista japonês e as chaves de sucesso da gestão japonesa e hoteleira. Segundo, análise de conteúdo dos comentários online de japoneses, onde os fatores de satisfação e insatisfação para os hotéis foram comparados. Os turistas chineses foram introduzidos no estudo (os turistas asiáticos que mais preocupam a hotelaria portuguesa) para analisar as diferenças entre os clientes asiáticos. Foram analisados 1.354 comentários de clientes (538 japoneses, 816 chineses) que ficaram hospedados em hotéis em Lisboa, Portugal, através do canal de reservas online booking.com. Terceiro, cinco diretores de topo e/ou especialistas em hotelaria foram entrevistados. Quarto, 187 questionários foram respondidos por diretores e gestores de clientes não apenas, no sector de hotelaria, mas também para outros sectores de atividade com o propósito de poder coletar opiniões sobre estratégia “fora da caixa” antes e após a pandemia Covid-19. As conclusões do estudo revelam algumas categorias comuns para os hotéis, positivas e negativas, divididas em dimensões: Instalações, Mercado, Pessoas, Processos, Financeiro (incluídas nas dimensões do “Balanced Scorecard”) e algumas diferenças relevantes entre japoneses e chineses, por exemplo, quanto a instalações do hotel, o que poderá ser classificado pelos japoneses como “histórico”, poderá ser classificado pelos chineses como “antiquado”. A estratégia hoteleira e satisfação ou insatisfação dos japoneses com os atributos dos hotéis foi comparada e um plano de melhoramento deverá ser implementado para que as expectativas dos japoneses sejam supridas ou superadas. Recuperar os mercados europeus e desenvolver pessoas deverá ser a prioridade após covid-19. Poucos estudos foram elaborados em Portugal sobre este assunto. O mercado japonês revela-se muito rentável em outros mercados europeus.

Este estudo contribui para a compreensão da cultura japonesa, satisfação e insatisfação dos turistas japoneses com os atributos dos hotéis, contribuindo com um plano de melhoramento da estratégia hoteleira portuguesa de forma a conquistar e ir de encontro às expectativas dos turistas japoneses.

Palavras-Chave: Cultura japonesa, Turistas Japoneses, Estratégia Hoteleira, Atributos do Hotel, Satisfação do Turista Japonês.

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List of Acronyms

AL – Local Accommodation

Aver – Average

BI – Business Intelligence

BS – Balanced Scorecard

Devia – Deviation

CFA – Confirmatory factor Analysis

CFI – Comparative Fix Index

EFA – Exploratory Factor Analysis

GDP- Gross Domestic Product

GT – Grounded Theory

GRI – Global Report Initiative

KMO – Kaiser-Meyer-Olkin

IMF - International Monetary Fund

MMC – Mazda Motor Corporation

MMP – Mazda Motor Portugal

NUTS – Portuguese territory division for statistics purpose. Created by Eurostat in 1970

PCFI – Parsimony adjustment to the CFI

RMSEA-Root Mean Square Error of Approximation

Std – Standard

SEM – Structural Equation Model

TLI – Tucker-Lewis Index

TMC – Toyota Motor Corporation

TP – Tourism of Portugal Official Office

TTAF – Toyota Tsusho Africa

UNWTO – World Tourism Organization

WOM – Word of Month

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Chapter 1. Introduction

1.1 Research Background

Apart from in 2020, when covid-19 had a hugely prejudicial effect on the Hospitality and Tourism sector all around the world, the sector had been growing and glowing. In 2020, Tourism was hit hard, putting millions of jobs at risk in one of the most labour-intensive sectors of the economy. International tourism fell by 22% in the first quarter and went on to decline by 60-80% over the whole year. 67 million fewer international tourists up to March translates into US\$80 billion in lost exports (UNWTO, 2020).

However, according to the UNWTO (Annual Report,2019), 2018 was the ninth year of sustained growth in Europe, the world's most visited region. Southern and Mediterranean Europe led the results. Italy, Greece, Portugal and Croatia showed robust performance, with Spain being the most visited destination (UNWTO, 2019).

The statistics showed constant growth performance, with the World Tourism Organization-Annual Report (2017) registering 1.323 million international tourist arrivals in 2017, which represents a 7% growth in 2016. The tourism sector has registered a constant yearly growth of 4% over the last 8 years, with the Chinese being the number one spender in world tourism in 2017.

In 2019, the hospitality and tourism sector in Portugal registered the largest export activity in Portugal, being responsible for 52.3% of service exports and 19.7% of total exports. Revenue from tourism represented 8.7% of Portuguese GDP. In the Portuguese economy, employment in tourism hit a high of 6.9%, accounting for 336,800 jobs in 2019. (Turismo de Portugal, 2019).

While the importance of the tourism sector for Portugal would appear to be obvious, this study should nevertheless focus on some areas within the sector. Asian tourists are pointed out as great spenders when travelling abroad. In fact, the Japanese were number one in Spain in 2019 (Turespaña, 2019). Combining this with the author's professional experience in Japanese companies and in the Hospitality and Tourism Sector, this study will focus on Inbound Japanese Tourists in the Portuguese market. To evaluate the relevance of such a study and to formulate and confirm the research problem, in 2017-2018 the author conducted interviews with a director from the Portuguese Tourism Office, a member of the board of directors of a Portuguese Hotel Chain, and four Japanese tourists accustomed to travelling in Europe.

1.1.1 Portuguese Tourism Office

According to the Portuguese Tourism Office (TP), Japan is an important market to win over. In the past, the TP has tried to make gains in this market but without success, mainly because: “Japanese and Asian culture in general, are different from that of Portugal. Regarding service, the Portuguese hospitality and tourism sector could not meet their expectations which, being high, were beyond what Portugal could offer at the time”. A direct flight had been introduced but was later cancelled (Interview with TP Director, 2018). In 2019, Lisbon launched a weekly direct charter flight to Japan as an experiment. The aim was to analyse whether Portugal could grow the Japanese inbound tourism market and whether that growth would sufficiently reward the effort invested. Unfortunately, not long afterwards, measures to combat the Covid pandemic shut down almost all flight connections.

1.1.2. Portuguese Hotel Chains’ Board of Directors’ Perspective

For one board member of a Portuguese Hotel Chain: “Portugal’s hospitality sector faces the problem of not having the sort of 5-star service expected by Asian tourists.” “Asian cultures are not easy to understand so, this chain gave up investing in those markets. It is easier and less expensive to focus on European markets. For most people, Asians are Chinese even if they are Japanese or Korean, and understanding their culture is almost a “mission impossible”. Regarding the Asian Markets, Portugal’s hospitality sector is dependent on the actions of the TP (Interview, 2018).

1.1.3. Japanese Tourists’ Perspective

The Japanese are seen as respectful people who always try, as far as possible, to leave places as they found them when they arrived. This could be seen during the 2018 football world cup; even if they lost a game, they were always grateful for the experience and before quitting the spaces they had occupied, they would clean them. According to a 2019 study of Turespaña, 90% of Japanese tourists visiting Spain had graduated university with at least a first degree. This is an important factor for a sector where investments in property and maintenance have a huge impact on the profit bottom line.

In 2017, from interviewing four Japanese who live in Japan and were tourists in various European Countries, it was discovered that Cascais is very well-known among the Japanese because the name Cascais is very similar to Katsukaihu. This, as Nomura-san mentions, is made

up of the “Last Samurai Family name “Kaishu” plus the last name, which is said in one word as Katsukaishu, and Japanese people learned there is a place in Portugal called “Katsukaishu”. This is not the correct pronunciation, which should be Cascais, but when the Japanese say, 'I want to visit Kataukaishu', Portuguese people understand them to mean that they want to go to Cascais”. When visiting Cascais and staying in a Lisbon hotel, the main reasons cited for not returning or recommending the country to others are: “security concerns”, “unkind people, and unsatisfactory services”. This feedback is consistent with the findings of Lee and Hu, 2005, and revealed that customers generally complained about fundamental service failures, such as poor service quality and rude employees.

When choosing where to visit, Japanese tourists prefer historical, small luxury and boutique hotels. Their priorities are for historical and cultural attractions, settings of natural beauty, and security. Their holidays are mainly booked through travel agencies.

1.2. Research Problem

As the Japanese themselves are accustomed to offering high quality service, they expect to receive that in return. With respect for others being a cornerstone of their culture, misunderstandings based on cultural “faux pas” can sour and ruin relationships between Japanese and Western people. Insensitive handling of *cultural* differences can lead to culture clashes and increase management costs (Lu and Zhu, 2019). The standard of service in hotels operating in Portugal, even if they are five stars, does not meet the accepted standards of international five-star hospitality. In Portugal, where there is no specific focus on Japanese tourists, and where Asian tourists are seen as predominantly Chinese, the same hotel standards apply regardless of a customer’s country of origin. Based on the author’s professional experience and discussions with Japanese Tourists and Hospitality partners operating in Portugal, the Japanese and Chinese, despite both being Asian, have both cultural differences and similarities.

The main research problem resides in evaluating the mismatch between Japanese tourists’ expectation of high-quality (including service) - based also on their culture - and the actual attributes of luxury hotels (including service) available in Portugal. This mismatch can contribute towards the dissatisfaction of Japanese tourists and, consequently, to their not

returning or recommending that others come to Portugal, thus compromising sustainable growth in the Japanese market, which is known to be a very profitable one.

Hospitality requires a thorough understanding of what will please the guest (King,1995).

1.3. Research Questions

Through an exploratory study, and using qualitative and quantitative methodology, this study seeks to answer the following main research questions:

- a) What is the strategy of Portuguese luxury hotels with regard to meet Japanese tourists' expectations (before and after-Covid-19)?
- b) What do Japanese travellers consider positive and negative hotels' attributes of the luxury hotels operating in Portugal? Are the preferences of the Japanese and Chinese similar or different?
- c) Is the Japanese Inbound Market appealing and profitable to investors and shareholders?
- d) Is there room from improvement in hospitality to achieve a match between Japanese tourists' hotels attributes expectations and hotels attributes of Portuguese luxury hotels?

The main objective is to provide a better understanding of the culture and expectations of Japanese tourists in order to contribute with insights to improve hospitality management strategy and, consequently, improve both tangible hotel attributes (such as: features) and intangible hotel attributes (such as: service).

1.4 Motivation

The author works in the Hospitality and Tourism sector and worked as a top management executive for 14 years in Japanese multinational companies (Mazda and Toyota). The author understands the unique Japanese ways of thinking, being and negotiating, where with no verbal language or overt hierarchy, the oldest and more experienced people take the lead. Attention to detail, utmost respect for others, customer satisfaction and continuous improvement put Japanese companies on top for quality and customer satisfaction. Indeed, it is customer satisfaction that attracts new customers and retains existing ones. Japanese culture is present in the management of these companies, where long-term strategy, "think big and start small",

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teamwork and people development are the keys to success. Just in time, “genchi genbutsu” (go and see) are impassioned Toyota philosophies that impact different industries all around the world. By understanding the culture and needs of each market and every different customer, and by adjusting its products to the different markets, Toyota has earned its reputation as the most valuable Japanese brand company in the world (Statista, 2021). It is not by chance that Toyota vehicles are so reliable in Africa (filters are tested and adjusted to dust density and poor gasoline features, cars have reinforced suspension to cope with the dust and dirt track roads). In Dubai, their vehicles are fitted with the best Air Conditioning system, a key feature for success when temperatures reach 50 degrees Celsius. As a result of this attention to different market needs, they are top in sales, top in customer satisfaction and very, very profitable.

The author experienced first-hand this company’s focus on training employees to meet customer and market needs and expectations. To achieve their extraordinarily high customer satisfaction, everyone in the Toyota system, including suppliers, is trained, and involved in accordance with Toyota Values – also called the Toyota Way – the playbook for which is constantly updated (book with no launching date). The foundations underpinning the Toyota Way are: Continuous Improvement (Challenge, Kaizen, Genchi Genbutsu) and Respect for People (Respect and Teamwork).

As customers, the Japanese expect high quality service from employees. In accordance with the author’s work experience, while the opportunity for Portuguese Hospitality and Tourism to attract and retain Japanese tourists exists, preparing the sector to meet the expectations of these tourists presents a massive challenge. A thorough understanding of Japanese culture is key to adapting services in such a way as to achieve a high standard of customer satisfaction.

In the Hospitality industry, it is easy to understand the importance of employees on the one hand, and customers on the other. The Japanese as tourists are respectful and renowned for being big spenders when on vacation (in 2019, they were the highest spenders in Spain), they are also used to receiving outstanding service in return.

However, there is considerable diversity among Asian tourists, and this requires a deeper understanding of the different Asian markets which, in turn, means shifting Portugal’s current focus from being solely on Chinese tourists. The diversity of cultures across Asian countries needs to be taken into consideration (Bui and Trupp, 2020).

1.5 Objectives

In this study, the main objectives are: to explore the Portuguese luxury hotel management strategy with regard to Japanese inbound tourists; to understand what Japanese tourists are satisfied and dissatisfied with when they stay in luxury hotels in Portugal; to know what their expectations are when they stay in luxury hotels; and to reach a conclusion about how well the current Luxury Hotel Management Strategy aligns with Japanese customers' expectations and experiences of hotels in Portugal.

The main purpose of the study is to then formulate advice on future strategies for improvements to help the hospitality sector achieve sustainable growth in income from Japanese tourism to Portugal.

To achieve this, the study is divided into sub-objectives as follows:

1. To understand Japanese Culture and Management
2. To understand Japanese Tourists
3. To understand the Most Valuable Hospitality Company in the world (Hilton) and the Most Valuable Japanese Company in the world (Toyota)
4. To understand what the positive and negative hotel attributes are for Japanese and Chinese tourists and finding similarities and differences.
5. To understand current Portuguese hospitality strategy concerning the Asian Market in general, and the Japanese, and Chinese specifically (before and after Covid). Understanding thoughts about strategy from managers in the hospitality sector, as well as other managers experienced in dealing or working with the Japanese but operating in other sectors of activities (thinking outside the box).
6. To reach conclusions about the fit or mismatch between Japanese customers' expectations of hospitality at home and, in this case, Portugal.
7. To propose a luxury hotel plan of improvement to meet Japanese tourists' expectations.

Sub-objectives 1., 2., 3. and 4. are achieved through Literature Review. Sub-objective 3. reveal a strategic management tool that Hilton and Toyota have in common, the Balanced Scorecard. The Balanced Scorecard Dimensions (Customer/Market, Processes and Procedures, People Development, Finance) formed the basis of the structure for the Interview Guidelines and Questionnaires. Sub-objective 4. is achieved through content analysis of booking.com reviews submitted by Japanese and Chinese luxury hotel customers. Sub-objective 5. Is

achieved through interviews and questionnaires. Sub-objective 6. compare the outcomes of 1., 2., 3. 4. with 5. Sub-objective 7. is built based on the outcome of sub-objective 6.

1.6 Research Methodology

Owing to the exploratory nature of this study, a mixed-method approach was taken. The flexible, informal nature of the top management interviews permitted the use of the principles of “laddering”, (Reynolds and Gutman, 1988). Taking a more inductive approach meant that more emotional information was obtained from the interviews. The qualitative methods used throughout the interviews via questionnaires with semi-open questions to managers of 4- and 5-star hotels and hospitality experts allowed the researcher to discover new variables and relationships. These methods, at the same time as revealing complex processes, aided understanding of them, too, and illustrated the influence of social context (Shah and Corley, 2006). The qualitative approach was complemented with a quantitative approach, using the questionnaire for hospitality managers, hospitality front-office staff and the managers of other sectors (thinking outside the box).

1.6.1. Population: Japanese Tourists and Portuguese Hotels

According to statistics issued by Turismo de Portugal (2019), 144,007 Japanese visited Portugal in 2019, with 81% of Japanese Tourists preferring to stay in 4- or 5-star Hotel accommodation. Chinese tourists were introduced in the analysis in order to compare them with Japanese tourists and to reach conclusions regarding any similarities and differences as far as satisfaction with and expectations of hotels attributes are concerned.

1.6.2. Sample: Japanese Tourists and Luxury Hotels in Lisbon

From the total of Japanese tourists visiting Portugal in 2019, 59% preferred to stay in 4- and 5-star hotels in the Metropolitan Area of Lisbon. In total, there were 166 hotels operating in the Lisbon Metropolitan area (Turismo de Portugal, 2019), 47 with 5 stars and 119 with 4 stars (see Appendix D). This study will, therefore, focus on 4- and 5-star hotels (designated luxury hotels) operating in the Lisbon Area. The study focuses on the Asian Market (Japanese tourists) and Lisbon Luxury Hotels (4- and 5-star hotels), which is where the majority of Japanese tourists choose to stay (Turismo de Portugal, 2019). Chinese tourists were introduced to confirm the need for a diverse hospitality strategy for Asian Markets/Customers.

With online review analysis having become an indispensable marketing tool for managers because reviews provide information that is key to enhancing hotel service and, consequently, increasing profits, this study used the information provided by the online travel agency, booking.com as secondary data. On May 1st, 2020, of the 166 hotels aforementioned booking.com listed 152 (representing 92% of the total). This information was cross-referenced with the secondary data received from Atlas da Hotelaria (Deloitte, 2019).

From the 152 hotels listed on booking.com, every single comment made in the Japanese and Chinese reviews about hotel chains in the Top 10 (Deloitte, 2019) operating in Lisbon City or Historic Centre was analysed. Hotels located more than 10 km outside Lisbon or away from its historic centre were excluded because they had few or no Japanese reviews on booking.com.

Other hotels, not included in the Deloitte study's top 10, were also analysed. These hotels (some of which are in the Top 20), included Hotel Chains with more than twenty Japanese Reviews on booking.com and also the Heritage Hotels (Small Boutique Hotel Chain), preferred by Japanese comparing with Chinese.

1.6.3. Secondary Data (booking.com)

Comments made on booking.com were analysed from Japanese customers and from Chinese customers out of a sample of 46 hotels (4 and 5 stars, operating in Lisbon). 34 hotels are in hotel chains included in the top 20 (Deloitte, 2019), 8 are from small hotel chains (boutique) and 4 are independent. A chain hotel is one that is part of a group of hotels under the brand of a hotel group—a company that manages several hotels in different locations that use the same name or brand. The opposite of chain hotels are independent hotels that operate independently (O'Neill & Carlbäck, 2011; Xu, 2018). Although only 16 hotels are small boutique and independent hotels, they represent 46% of the number of Japanese Reviews, confirming the result of the Xu (2018) and Botti et.al (2009) study that customers are more inclined to describe the core attributes of the products and services of independent/chain hotels in online textual reviews in more detail to help future customers make purchase decisions. There were more Japanese comments than Chinese for boutique hotels. And while the Japanese were pleased with the design of historic buildings, the Chinese, in some cases, considered them to be outdated. NVivo (content analysis software) cloud of words will be also applied.

1.6.4. Interviews of Top Managers/Experts and a Pre-Test Questionnaire

Interviews to Hospitality Top Managers and Experts has been done to have a better understanding of Luxury Hotels strategy concerning Asian Markets in general, Japanese and Chinese in specific. The interviewer's sample is a non-random sampling with a purpose.

A qualitative approach was taken, and the most relevant top management of the Top 10 (Deloitte, 2019) were selected for interview. The purpose of the study was explained, an interview guideline was sent, and confirmation of availability for a phone conference, via WhatsApp or a face-to-face meeting was sought so that the subject could be discussed in further detail.

1.6.5. Questionnaire for Hospitality Managers (including Front-Office) and Management in Other Sectors

The questionnaire was constructed based on the Literature, the analysis of booking.com reviews and the results of the interviews. As described before, from the Literature Review, a link was discovered between the management strategies of the Hilton group and Toyota – both sets of strategy being based on the Balanced Scorecard (strategy tool). Hence, the questionnaire was structured to reflect the Balance Scorecard Dimensions.

With regard to the Hotel sample, respondents were selected according to their experience in either hospitality management or with front office interaction (direct contact with customers). For other sectors, experts in management or management experience with the Japanese or working in Japanese companies were selected.

1.7. Data Analysis

Descriptive Statistics and Hypothesis Tests

SPSS26 will be used to analyse the results from booking.com and the questionnaires.

With regard to the questionnaires, descriptive statistics were used as a tool to aid understanding of the substance of valid responses by sector: Means and standard deviation were compared.

One way ANOVA assumes that the samples are drawn from normal distributed populations with equal variances. Levene's test would be used to assess for homogeneity of population variances. When the null hypothesis of ANOVA is rejected (p-value is less or equal to 0.05), multiple comparison tests would be applied: Scheffé when population variances are equal and DunnettC test would be adopted in case of different population variances.

A crossover study was made using the variables: Sector, Age and Sex.

Principal Components

Principal Components Analysis (a statistical procedure) was used to reduce the number of variables by transforming a large set of variables into a smaller one that still contains most of the information in the large set.

The Kaiser-Meyer-Olkin (KMO) and Bartlett test for 24 variables was used and Cronbach's Alpha verified the internal consistency of the factors (George and Mallery, 2003). The Varimax method was used to analyse the principal components and to determine the most significant weight variable. The weights of the selected variables are higher than 0.5 and Alpha of Cronbach higher than 0.7.

Confirmatory Factor Analysis

The Amos26 (SPSS) output of Chi-Square, RMSEA, CFI and TLI was used to evaluate the Model Fit for the strategy before covid-19.

A Measurement Model and a Model Estimation using Equation Modelling (SEM) will be presented. Construct Validity will be confirmed through Convergent and Discriminant Validity.

The weight of each independent variable can reflect its importance in the hospitality strategy (dependent variable).

1.8. Structure of the thesis

The thesis is structured as follows:

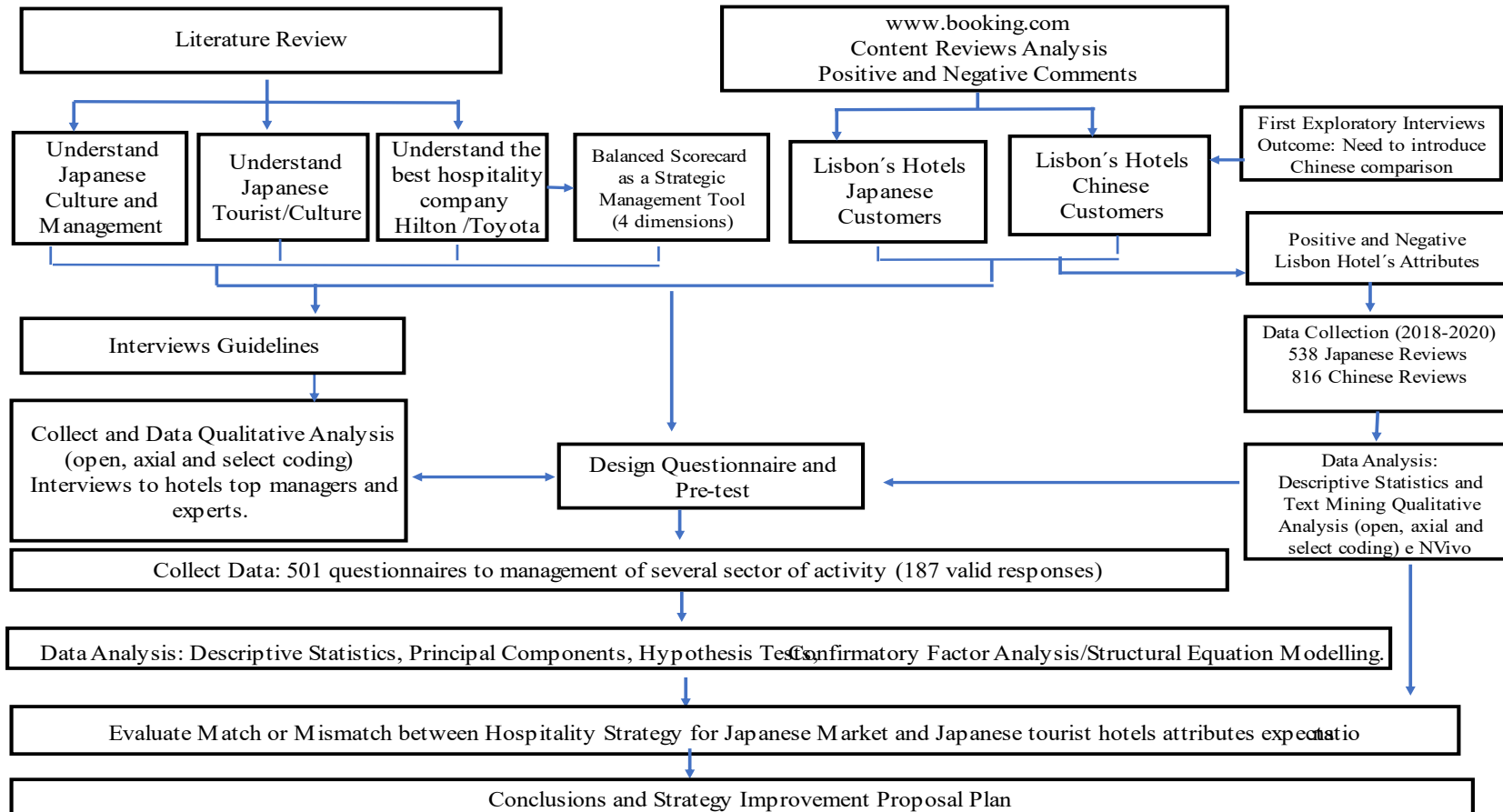
1. Introduction 2. Literature Review 3. Methodology 4. Results and Analysis 5. Discussion, Conclusions, Limitations and Future Research (Adapted from Quivy and Campenhoudt, 2008).

The introduction has a summary of the main research problem, the main research objectives and questions. The pillars of the Literature Review are explained in Chapter 2, the state of the art for the subject is summarised and a concept model is presented. In the Chapter 3 on Methodology, the methodological approach and path used for collecting the data by source are detailed (booking.com, interviews and questionnaires). Results and Analysis referring to booking.com data, interviews, and the results and analysis of the questionnaires, with an updated concept model presented at Chapter 4. Chapter 5, with the Discussion and Conclusions, provides an overview of the originality and value of the research, as well as answers to the research questions, major conclusions, and research contributions. It also puts forward limitations encountered during the study and topics for future research.

A research roadmap that summarizes all the research steps is presented at the end of this Chapter.

Japanese Income Tourism
An exploratory study of Portuguese luxury hotel management strategy

1.9. Research Path / Roadmap



Source: Own Elaboration

Chapter 2. Literature Review

This thesis adopted a conceptual framework based on a literature review divided into three main pillars (Figure 2.1): Understanding the Japanese Culture and Management, Understanding Japanese Tourist Behaviour, and understanding the Management of two specific companies (Toyota and the Hilton group). These companies were chosen as they are good examples of successful management in Japanese industry and Hospitality. In their sectors of activity (Automotive and Hospitality), Toyota and the Hilton group are the Most Valuable Companies in the world. With its values grounded in Japanese culture, the Japanese Automotive company Toyota has inspired several companies in diverse sectors of activity around the world. Understanding the similarities and differences in the successful management styles of Toyota and the Hilton group is fundamental for this study.

Selecting the literature for review followed three main themes, as shown in the figure below:

2.2. Understand the Japanese Culture and Management	2.3. Understand the Japanese Tourist Behaviour	2.4. Understand the Most Valuable Hospitality and Japanese Company in the world
<ul style="list-style-type: none"> • The Japanese self and Ikigai. • The Japanese Culture versus Japanese Management 	<ul style="list-style-type: none"> • Japanese Tourist versus Western Tourist. • Customer Satisfaction and service quality. • Cross-cultural differences. The Market Approach. 	<ul style="list-style-type: none"> • Similarities and differences between: • Most Valuable Japanese Company in the World (Toyota) and the Most Valuable Hospitality Company in the World (Hilton)

Figure 2.1 – Literature Pillars

Source: Own Elaboration

The theme selection was made taking into consideration some key words: Japanese culture (general and business), Japanese, Toyota and Hilton Management, Hospitality Management, Quality and Customer Service Development, Asiatic and Japanese Tourism, Japanese Tourist behaviour, preferences, and satisfaction. Japanese Tourists and Hotels Attributes.

Information sources were scientific papers (rating 3 or above with a high number of citations, main theories, and the most recent ones), newspapers, magazines, and internet content. Secondary data involved: Statistics –Turismo de Portugal, UNWTO (World Tourism Organization), JTB (Commissioner of Japan’s Tourism Agency) and other Japanese and European sources. Information from online travel agencies (booking.com). A summary of the bibliography consulted by subject is presented in Appendix A.

2.1 Basic Concepts

a. Luxury

It is common sense that luxury is “like a feeling” and is each person’s subjective interpretation, luxury is a state of mind (Bernstein, 1999). It is also usual to equate hospitality luxury with room size, features and price - with high prices distinguishing luxury hotels from non-luxury hotels (Al Khattab and Aldehayyat, 2011). In relation to the physical dimensions, it is consistent with previous studies (e.g., Bitner, 1992; Zemke & Pullman, 2008) that the surroundings; space and functions; signs, symbols, and artefacts are important aspects of a luxury hotel’s physical environment. Hotel guests’ experiences are not simple occurrences but rather a complex phenomenon. (Walls et al., 2011).

b. The Classification of Hotels by Stars: 4- and 5-star hotels

The original star-rating system was started by Forbes Travel Guide in the 1950s. Since then, several different evaluating bodies have assigned stars, so it is important to check who the evaluator is and what its system entails. For instance, in the U.S., Forbes is still one of the leading star-assigning bodies, as is AAA. In the U.K., tourist authorities such as VisitBritain and VisitScotland are in charge.

According to the World Travel Organization (2015), the Portuguese hotel classification system is implemented by the National Tourist Board and rates from 1 to 5 stars (“Palace” has the classification of 5 stars). The implementation criteria is self-assessment followed by inspection conducted by the National Tourist Board. The measurement is based on the presence or absence of certain criteria, with inspection occurring again in 4 to 5 years. The top three areas are the rooms, bathroom, and F&B (Food and Beverage).

Hotel star ratings are covered in Portugal under the law “Portaria n. ° 327/2008” of April 28th.

c. Hospitality

Hospitality in restaurants and hotels is a process involving provider/employee and receiver/guest (Reuland, Choudry and Fagel, 1985). This process involves the transfer of three elements: product (meal or bed), behaviour of employees, and the restaurant or hotel environment (King, 1995).

d. Tourist

A visitor (domestic, inbound or outbound) is classified as a tourist (or overnight visitor), if their trip includes an overnight stay (UNWTO, 2008).

e. Inbound Tourism

Activities of a non-resident visitor within the country of reference on an inbound tourism trip (UNWTO, 2008). In our study, the focus is on Japanese Inbound Tourists.

f. Country of reference

The country of reference refers to the country for which the measuring is done (UNWTO, 2008). Japanese tourist's incoming to Portugal (country of reference), independently of the country they are coming from.

g. Tourism destination

A tourism destination is a physical space with or without administrative and/or analytical boundaries where a visitor can stay overnight. It is the cluster (co-location) of products and services, and of activities and experiences along the tourism value chain and a basic unit of analysis. A destination incorporates various stakeholders and can network to form larger destinations. It also involves intangible aspects, its image and identity which may influence its market competitiveness (UNWTO, 2019).

In this research, the tourism destination is Portugal, with the focus on Lisbon.

h. Tourism Expenditure

Refers to the amount paid for the acquisition/consumption of goods and services, as well as valuables, for own use or to give away, for and during the tourism trip (UNWTO, 2008).

i. Customer Satisfaction

Consumer satisfaction is a judgment that a product or service feature, or the use of product or service itself, provides pleasure-related fulfilment (Oliver, 1997).

Customer satisfaction can be seen as deriving from a customer's overall experience with a product or service that provides a sense of economic well-being as a component of an individual's overall quality of life (Jonhson et al., 1995).

Anton (1996) took a more contemporary approach, defining it as expectations met or exceeded throughout the life of the product or service, resulting in subsequent repurchase and loyalty. A traditional definition of customer satisfaction followed the disconfirmation paradigm of customer satisfaction / dissatisfaction, as the result of interaction between the consumer's pre-purchase expectations and post-purchase evaluation (Choi and Chu, 2000).

Customer satisfaction is defined as "a person's feelings of pleasure or disappointment that results from comparing a product's perceived performance or outcome with his/her expectations" (Kotler and Keller, 2009, p. 789).

j. Customer Experience

Customer experience is defined as the internal and subjective response customers have to any direct or indirect contact with a company (Meyer & Schwager, 2007).

k. Customer Delight

From the disconfirmation perspective, customer delight is where the experience goes beyond satisfaction and involves a pleasurable experience for the guest (Patterson & Spreng, 1997). And, as well, customer delight is a mixture of joy and surprise with an affect-based approach (Finn, 2005; Kumar, Olshavsky, & King, 2001; Oliver et al., 1997).

l. Service Quality

This is the degree of difference between the customers' expectations for service and their actual perceptions of performance (Parasuraman et al., 1985).

Service quality, however, goes beyond just efficiently satisfying needs. Technical service is moderately significant, and the importance of expressive service in memorable guest experiences is highlighted (Sipe and Testa, 2018).

m. Culture

One of the first anthropological definitions of culture describes it as a complex whole which includes knowledge, beliefs, arts, morals, law, customs, and any other capabilities and habits acquired by a human as a member of society (Tylor, 1871). This research used the Hofstede, Hofstede & Minkov (2010) definition of culture, where a comparison between eastern with western cultures can be found in six cultural dimensions: 1) Power Distance (embraces hierarchy versus egalitarian), 2) Collectivism versus individualism, 3) Uncomfortable with uncertainty versus comfortable with uncertainty, 4) Masculinity versus femininity, 5) Long-term versus short-term orientation. 6) Restraint versus Indulgence.

n. Strategy

The word “strategy” is derived from the Greek word “stratēgos”; stratus (meaning army) and “ago” (meaning leading/moving).

Strategy includes developing a detailed understanding of customers’ needs, and then identifying unique ways of creating value for the ones the firms choose to serve (Collis and Rukstad, 2008).

o. Ikigai

“Ikigai” is a Japanese word made up of “iki” (live) and “gai” (reason).

p. Kodawari

“Kodawari” is a Japanese word which means that ordinary people are not satisfied with sufficient, sufficiently good is not good enough.

q. Balanced Scorecard (BSC)

The balanced scorecard is like the dials in an airplane cockpit: it gives managers complex information at a glance. The Balanced Scorecard puts strategy – not control – at the centre (Kaplan and Norton, 1992).

More recently, Levdokymov and Zavalli (2020, p.19), summarized a state of the art about the conceptual framework of a balanced scorecard from four main perspectives:

1) the BSC as a tool for strategy implementation. The main feature of this approach is to use the BSC to improve the efficiency of the enterprise by increasing its adequacy of response to changes in the external environment and, accordingly, its overall degree of flexibility in

management, which will certainly positively affect the processes involved in implementing the strategy.

2) the BSC as a tool for strategy management. Given that strategic management encompasses more objectives (including the implementation of the strategy), the scope to be covered by the BSC will also be wider than the first approach. The BSC, therefore, has to adjust the selected objectives of the enterprise to justify their expediency and guide the choice of new objectives. Achieving this will provide the enterprise with competitive advantages in the business environment.

3) the BSC as a system for strategy management. Compared to the second approach, this is more complicated since the BSC is defined as a holistic set of activities aimed at achieving the strategic objectives by using a set of specific methods.

4) the BSC as a strategic performance management system. The main aspect of the approach that using the BSC takes is that different processes (measurement, evaluation, analysis, monitoring) should be the basis for strategic management, and be based on clearly defined performance indicators for different areas of activity (perspectives). The fact there are different approaches to the definition of the BSC is due to the fact that the theoretical basis of the approach is constantly developing and evolving in accordance with the needs of management and the general challenges of society.

Following the original concept of Kaplan and Norton, in this study the focus of the Balanced Scorecard as a *strategic tool* (measurable) based in four pillars: Customer and Market, Processes and Procedures, People and Finance.

2.2. Understanding Japanese Culture and Japanese Management

In 2019, the population of Japan was 126.9 million with an unemployment rate of 2.3%. (Turismo Portugal, Travel BI, 2019). As one of the countries where there are more people over 100 years old and where the illiteracy rate is below 1%, the ageing population is of considerably concern. Known for their practicality and because their use obviates human touch, robots are being developed to take care of the elderly in palliative care. The cost of health care increases as a consequence of an ageing population, and in 2019 it contributed to raising Japanese public debt to a new record, representing 200% of Japanese GDP. However, this debt will not crash the economy as it did, for example, in Greece; this is mainly because Japan has a strong economy and high savings level, with 90% of the debt in the hands of Japanese Investors, Japan

Bank Investors in particular. Indeed, Japan not only owes no money to any international organization, but it makes a large contribution to the IMF (International Monetary Fund), and net Japanese investment is one of the biggest in the world.

2.2.1 Japanese-self and Ikigai

The first western people to contact the Japanese were the Portuguese (Ocenario, 2021). Portuguese heritage in Japan influenced four sectors of activity: Religion, Politics, Culture, and the Economy. The Portuguese introduced Jesuit Christianity, the first gun, and some culinary customs such as, cooking with oil, tempura and sugar. The Japanese cake, “kastera” is similar to the Portuguese “pão-de-ló” cake. That Portuguese heritage is still alive today, in the tempura dishes in Japanese restaurants, the “kastera” cake in their tea ceremonies and, as well, in several words such as: “botan”, “joro”, “pan”, “shabon”, “byōbo” (portuguese words: “botão”, “jarro”, “pão”, “sabão”, “biombo”).

Japanese culture is inculcated from birth, with children being raised on solid foundations, much like a house is built. The values of respect for others, teamwork and the power of the group are passed on to children at school. Under adult supervision, they move together in groups going to and coming back from school. Children thank their teachers for the knowledge they impart with a formal greeting at both the beginning and end of class (*kiritsu*). Teachers visit their students’ home to understand what their students need to do every day to get to school and to see how they live (*katei homon*). This philosophy is quite like Toyota’s management philosophy of “genchi genbutsu”, or “go and see for yourself” before forming an opinion about something or solving a problem. In Europe, we say “put yourself in the others’ shoes”, to see and feel it first-hand, before forming opinions or judging. In Japan, schools do not employ professional cleaners, all the cleaning is done by the students. This is how they learn to take responsibility, to conserve assets for others to benefit from in the future, and to care for society. Students have their meals together with their teachers and even mealtimes provide an opportunity for learning - a Total Man Concept (António, 1988). Long-term philosophy and family values can be seen in simple things such as, the school bag, the “*Randoseru*”, which is a very durable bag (in the beginning black for boys or red for girls), that can be passed from generation to generation.

However, while collective behaviour, respect for others, the well-being of the group and society are all paramount and seem to be common-place, the Japanese are, after all, individuals too and they have a Japanese-self. Mathews (1996) explained the Japanese-self in three degrees: I) what is taken for granted (selves of a given society, such as language and embodied social

practice); 2) the cultural shaping of self - “it can’t be helped”. “There is nothing I can do about it” (shikata ga nai) something experienced that is external to the self, such as social practices, cultural norms, and expectations that selves have considerable awareness of; and 3) the cultural supermarket that involves personal choices, cultural consumers, and creators of self. Mathews’ (1996) findings about “the Japanese self” revealed that at a certain point in Japanese history (1989-90) young people tended to live for their dreams, middle-aged people for their roles, and old people for the remnants of those roles.

An awareness of balance, sustainability and long-term vision is present in the Japanese culture in the simple, little things of everyday life. Ikebana (Japanese flower arrangements), the flowers should be placed in a balance way. People should have objectives until they die and live a long life with joy, happiness, and purpose. If you visit the Oceanário (Parque das Nações, 2021), you can see an exhibit of an underwater garden created by a Japanese called Takashi Amano. “Takashi was a nature photographer who travelled to forests all around the world, capturing the harmony of unspoilt landscapes. His exceptional art recreates nature, mixing Japanese gardening techniques with the concept of “wabi sabi”, which honours the interplay between beauty, simplicity, and imperfection. Takashi Amano believed that paying careful attention to nature can help us better understand the world and learn to preserve it. (Oceanário, 2021). Amano died in 2015 and when he recreated this scenario, he paid attention to how the plants would look like over the long-term. A long-term vision was very important in his planning and how he placed the plants.

This long-term concept is also present in “ikigai”. “Ikigai” is a Japanese word made up of “iki” (live) and “gai” (reason). This “ikigai”, or reason for living, is pursued by the Japanese, and seen as a motor of sustainability and long-term life. For Mogi (2017), Ikigai has 5 pillars: 1) Start from the small things; 2) Free yourself; 3) Seek Harmony and Sustainability; 4) Take Joy in small things; and 5) Live in the here and now.

In the Japanese language, the word “Ikigai” can be used in different contexts and applied to small daily acts for great objectives or conquests. “Ikigai” has also been linked to good health and long life, and several medical studies have validated the connection between Japanese long-life and “ikigai”. These studies show the positive role it plays in mortality risk (Sone et al., 2008), longevity (Tanno et al., 2009), in promoting health and reducing medical expenses in Japan (Ishida, R., 2014), and in lowering the risk of incident functional disability (Mori et al., 2017). In Japanese culture, having a sense of “life worth living (ikigai)” is the most used indicator of subjective well-being. (Sone et al., 2008). Also, “Moai” which means

"meeting for a common purpose" is considered important to achieving a long-life and is the basis of the sense of community and teamwork among the Japanese.

"Ikigai" is also linked to another concept, that of "kodawari" which means that ordinary people are not satisfied with sufficient, sufficiently good is not good enough. A connection with the (Kaizen) philosophy of "continuous improvement" can be made.

Other Japanese such as the film director Hirokazu Koreeda and the writer Haruki Murakami have used "ikigai" as the basis for their works, explaining the reason for living in the enjoyment of small things. Murakami in his self-portrait put himself as a backstage runner, every step centred and never ever losing sight of the full picture or vision that would allow him to go as far as possible. Learning from every single failure and every single happiness. (Murakami, 2007).

Also, in 2004, Dan Buettner joined the National Geographic to study the so called "blue zones" and then presented several seminars on "How to live more than 100 years", in which "ikigai" as a way to achieve good health and longevity was specifically discussed. Buettner studied five regions where people live longer (blue zones): Okinawa-Japan, Sardenha-Itália, Nicoya-Costa Rica, Icaria-Grécia, Loma-Linda (seven-day Adventists), California. Okinawa has the longest average life expectancy with lot of people over 100 years old. Buettner conducted several interviews among this population, and some of them cited the meaning of "ikigai" as a joy of small things that gives a sense of living life with a common purpose that encourages a long life.

Park (2015), studying the sense of "ikigai" and social support in the Asia-Pacific Region, came to the conclusion that the Japanese, South Korean and Chinese cultural spheres share common relationships, which contrast with the United States and India.

Although Japan has strong collectivist values, it seems that "ikigai" is individual, a concept where dreams, inspirations and individual realisations can thrive. "Ikigai" is something discrete and in harmony with the others. Living in the here and now, respecting others and in harmony with them. Harmony and sustainability are important for "ikigai".

It is the sense of "ikigai" connected with the third degree of Japanese-self, the cultural supermarket of Mathews (1996), that will be explored further in this investigation. Mathews used qualitative methods in his research, and during the interviews he conducted to find out what "ikigai" is, he received different answers. For a bank employee, it was his work, for a

middle-aged mother, from the time she got married, it is her family, and for a young girl, *Ikigai is travel*.

2.2.2. Japanese Culture versus Japanese Management

Japanese management, in this case, Toyota, is a case study worldwide. It is the most valuable Japanese company, and the most valuable in the automotive sector, in the world. Toyota is also a management role model and an inspiration for several companies operating in diverse sectors of activity. Concepts like “just in time” (stock management efficiency with zero inventory costs), “kaizen” (continuous improvement) and “lean” (production and management efficiency) were first introduced by Toyota and are nowadays applied in diverse companies all around the world.

An analysis of the Japanese Multinational Management (Toyota), Japanese family business and Japanese Sanctuary Management (an example of knowledge transfer from generation to generation) was conducted to understand the foundation of Japanese culture and behaviour.

Family Business

When something serious begins in Japan, it will probably go on for a very long time. The expression “family business” has a big and important history in Japan. There are several examples of family businesses that are hundreds of years old and still going strong, such as: Ikenobo (Quioto family) dedicated to the art of ikebana (flower arranging), in existence since 1460; the “Sen families” (Quioto family) tea ceremony business that is over 400 years old; “Toraya Japanese’ sweets”, managed by the Kurokawa family for over 500 years; and “Kongo Gumi” founded in 578 by three carpenters. Continuity sharing of knowledge, balance and sustainability are all present in each of these businesses. Even in some practices such as, ikebana (flower arranging), the flowers should be presented in the bouquet in a balanced way. Tradition, transmission of knowledge from generation to generation and balance are present in all these companies.

The Best Sushi Restaurant

Jiro Ono, who celebrated his 95th birthday in 2021, is the oldest three-Michelin star chef in the world. He manages the famous restaurant “Sukiyabashi Jiro” and, as mentioned in Ken Mogi’s “The little book of Ikigai” (2017), Ono-san can find “Ikigai” in simply serving the best tuna to a customer, feeling the fresh morning air, or in a morning cup of coffee. He loves what he does

so much that he says he would like to die preparing sushi, even though some of the tasks are very monotonous and detailed.

When Ono-san opened his first restaurant, he was not looking for fame, he merely needed a way to pay his bills. However, Ono-san had “*ikigai*” to support and motivate him to pursue outstanding *quality* (Mogi, 2017). He made *continuous improvements* in his business and designed special recipients that could fit in his strange restaurant space, all the time keeping everything clean and tidy. He also *improved* some sushi instruments, which nowadays are used in several sushi restaurants. All this work was done with love and with a strong sense of the importance of little things.

Japanese Sanctuary Management

The long life, proper maintenance and sustainability of the Japanese Shrine is a great example of successful long-term management. When we speak about *sustainability*, the “Ise Shrine”, considered one of the most sacred Shinto shrines in Japan, must be mentioned. Nowadays, most Japanese visit this shrine for the cultural experience, and the fact that it is rebuilt anew every 20 years explains a lot about Japanese culture. The current rebuilds took place in 2013 and the next one is scheduled for 2033. This process of eliminating and rebuilding every two decades has been going on for 1200 years. To preserve and rebuild everything in precisely the same way requires a lot of advanced preparation; trees have had to be planted, with some trees needing to be more than 200 years old to reach the right size. There is a theory that the shrine is rebuilt every 20 years to *assure that the necessary techniques, knowledge, and construction experience are all passed on from generation to generation*. The workers at the shrine have a great reputation, as model workers. The construction is completed without using a single nail, an achievement that without some internal, continually working mechanism would not be possible. Harmony is key to sustainability, and the main incentive lies in doing the task for the joy of doing it and not for any financial reward or social recognition (Mogi, 2017).

The most valuable Japanese company in the world (Toyota)

Considering Japanese Management overall, Toyota is a role model. It is the most valuable Japanese company in the world and the most valuable automotive company worldwide. It is a case study in customer satisfaction and service, and a top achiever in customer loyalty and product reliability. In seeking to understand Japanese culture and the “*ikigai*” that resides within every Japanese, it is also important to understand whether “*ikigai*” and the Japanese-self is also alive and beating in the principles that underpin this Japanese company. Not only is Toyota

admired worldwide, but it is also a great and important reference among the Japanese for standard of service and how customers should be treated.

Liker et al. (2004) identified the 14 principles of The Toyota Way (see Table 2.1) and arranged them in four sections:

1. Long-Term Philosophy
2. The Right Process Will Produce the Right Results
3. Add Value to the Organization by Developing Your People
4. Continuously Solving Root Problems Drives Organizational Learning

The book “Pensamento Lean” by Pinto (2009) mentions that six of the fourteen principles identified by Liker et al. (2004) concern people development. We could, however, also implicitly connect all of them to people (Liker & Meier, 2007).

At Toyota, knowledge sharing is taken seriously, they have internal “case studies” and publish magazines on social responsibility as part of every single budget of each company worldwide. From all of this, it is obvious that their emphasis is on putting people and customers first.

When we read about Ono-san and how his success is a result of the joy he derives from preparing sushi, beginning with the smallest detail to achieve a sushi masterpiece, serving his customers with happiness and focusing on high standards of quality and service, continuously improving, presenting better products, better processes and delighting his customers, we are reminded that these are the very pillars that support the successful Japanese company and that help it achieve sustainability. There is much in common with the two main pillars of the Toyota Way: respect for people and continuous improvement, and where challenge, Kaizen (the practice of continuous improvement), and Genchi Genbutsu (go and see) are also present.

In short, the Toyota concepts “built with passion”, “think big, start small”, respect for others and continuous improvement can be also linked to the Japanese-self “ikigai” as the studies analysed indicate that some people see their work as their “ikigai”, their reason to live. Similarities among Toyota Japanese Management, Japanese Sanctuary Management, Japanese Local Business Management and Japanese self (Ikigai) are summarized in Table 2.1.

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Table 2.1: Similarities among Toyota Japanese Management, Japanese Sanctuary Management, Japanese Local Business Management and Japanese self (Ikigai)

14 Toyota Principles	Japanese Ise-Shrine Re-built	Sukiyabashi Jiro Restaurant	IKIGAI
1 - Long-Term Philosophy	Built 1200 years ago.	Wants to die making sushi and, aged 95 in 2021, Ono-san is still serving customers in his restaurant.	Harmony and Sustainability
2 - Create a continuous process flow to bring problems to the surface (include also Long-Term Philosophy)	Processes in place. Trees must be planted 200 years, before rebuilding. Rebuilt every 20 years.	Processes in place to achieve the best sushi.	Harmony and Sustainability
3 - Use pull systems to avoid over production.	No waste in the rebuilding.	Everything fresh, every day. Just-in time in place.	Harmony and Sustainability
4 - Level out the workload (heijunka). (Work like the tortoise, not the hare - do not overburden people or equipment.	Each person plays a role. Rebuilding without using a single nail.	Harmony in the way Ono-san's restaurant works.	Harmony and Sustainability

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5 - Build a culture of stopping to fix problems, to get quality right the first time.	Every 20 years the shrine is rebuilt.	Always trying to achieve a sushi masterpiece.	Start from the small things
6 - Standardized Tasks Are the Foundation for Continuous Improvement and Employee Empowerment	Knowledge is passed on from generation to generation through the periodic rebuild every 20 years.	Ono-san standardized his processes, respecting his space station always improving.	Harmony and Sustainability
7 - Use visual controls, so problems cannot be hidden.	The shrine is a place to visit.	All processes can be easily seen.	Harmony and Sustainability
8 - Use only reliable, thoroughly tested technology that serves your people and processes.	Rebuilding without a single nail has stood the test of time for more than 1200 years.	Improve processes and tools.	Harmony and Sustainability
9 - Grow leaders who thoroughly understand the work, live the philosophy, and teach it to others.	The every-20 year rebuild is a way to teach others and for knowledge to be passed on through the generations.	Ono-san understands his work and lives for it and passes on the knowledge to his chefs.	Harmony and Sustainability
10 - Develop exceptional people and teams that follow the company's philosophy.	Preparation of teams for the rebuild every 20 years	Leadership example to achieve perfection in a sushi masterpiece.	Free yourself, live in the here and now
11 - Respect your extended network of partners and	Involve all partners (plant the	Involve all partners to have	Harmony and

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suppliers by challenging them and helping them improve.	trees, share the knowledge)	great fish to achieve a sushi masterpiece.	Sustainability
12 - Go and see for yourself to thoroughly understand the situation (Genchi Genbutsu).	Built in situ.	Made in situ.	Harmony and Sustainability
13 - Make decisions slowly by consensus, thoroughly considering all options; implement decisions rapidly (nemawashi).	Plan carefully and execute rapidly.	Plan carefully and execute rapidly.	Harmony and Sustainability
14 - Become a learning organization through relentless reflection (hansei) and continuous improvement (kaizen).	Learning organization passing on knowledge from generation to generation	Always improving processes and tools.	Harmony and Sustainability; Free yourself.

Source: Liker et al. (2004)

Source: Mogi (2017)

Source: Mogi (2017)

Source: Mogi (2017)

It is easy to see the similarities between the management principles of the most valuable Japanese (multinational) company in the world (Toyota), small businesses like Ono-san's sushi restaurant, the way Ise Shrine is rebuilt every two decades and the Ikigai principles in accordance with Mogi (2017).

In key words, the similarities can be summarised as follows: Processes in Place, Leadership and Teamwork, both will contribute towards Harmony and Sustainability. In the end, all of these will contribute towards a better Long-Term strategy as summarised in Figure 2.2.

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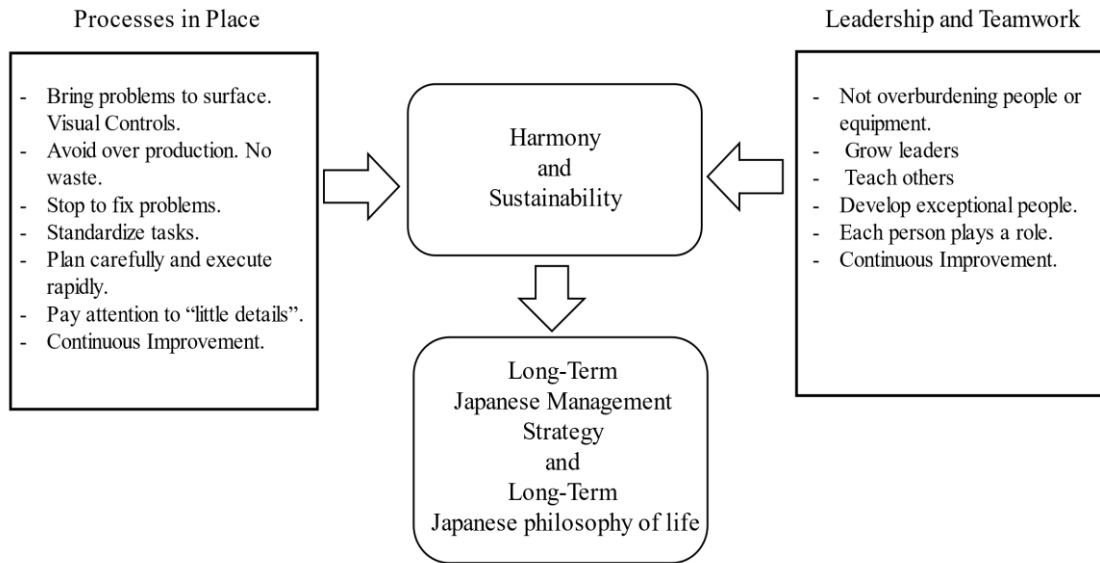


Figure 2.2: Pillars of Japanese Long-Term Strategy

Source: Own Elaboration

For Japanese management, people development and having processes in place are very important and crucial for the overall harmony and sustainability of companies and people in an enterprise or social context. Harmony among the people, knowledge passed on to the teams and from generation to generation, and respect for elders’ knowledge are all key to the long-term sustainability of Japanese culture. What companies and people want to achieve in the long-term is a motor to drive the sustainability of companies and society. Process concepts like “lean” and “just-in-time” contribute to help healthy companies avoid waste and increase productivity and efficiency. As a population, the Japanese always seek objectives, teamwork, and group harmony. They work together as a community even if they are retired, and they work together as a group, never losing sight of objectives. They do things with joy and pleasure like, for example, pottery, gardening, calligraphy workshops, anything that can contribute towards their long, happy life, which always has a purpose. This can be seen also in the Principles of Toyota Management and Ikigai.

In line with the Toyota philosophy and ikigai, similarities can also be found in the Seven Deadly Diseases of Management and quality achievement based in the Deming Institute and cited in Antonio et al. (2016), where long-term thinking, harmony and good health are present.

Diseases of management put the emphasis on short-term profits, fed by fear of a hostile takeover, of pressure from bankers and owners for dividends, from too much emphasis being on evaluation of performance, merit rating, or annual review, and excessive medical costs. As reported by Deming in *Out of the Crisis* (2000), executives shared with him that the cost of medical care for their employees was amongst their largest overall expenses, not to mention the cost of medical care embedded in the purchase price of what they bought from their suppliers, and the exorbitant costs of liability, inflated by lawyers that work on contingency fees.

Similarities between the Japanese Management style in Japanese Multinational Companies, Japanese Family Businesses and Japanese Culture are evident. Harmony, Sustainability, Processes in place, Continuous Improvement, Respect for others and Long-Term Vision are basic concepts across the above examples. Through teamwork and a continuous improving and learning process (as a company and individually), the aim is to achieve perfection with joy and passion, yet never forgetting to build a sustainable legacy for the future generations.

2.3. Japanese Tourist

Several studies have shown that an understanding of the customers' culture contributes to customer satisfaction. Customers' definitions of what constitutes a hospitality product might depend on their cultural heritage (Houghton & Treblay, 1994). To be successful, organizations must investigate the needs and wants of their customers (Singh, 2006). In the end, the question is: does nationality influence tourist behaviour?

2.3.1. Japanese Tourists and Western Tourists

Pizam and Sussmann (1995) used tourist groups of four nationalities (Japanese, American, Italian, and French) on escorted motor-coach tours, to analyse the perceptions of tour-guides regarding the differences and similarities among the tourists. Based on the results of this study, it could be suggested that for tourists involved in the group-tour situation, the guides perceived many more differences than similarities in the behaviour of the four tourist nationalities. The Japanese were perceived to be the most distinct, and the Italians the most like the other nationalities. A paired comparison found that the tour guides perceived the Italians and French to be the most alike in their behaviour, followed by the Italians and Americans. The pair that was perceived to be the least similar were the French and Americans. The behavioural characteristics that evidenced the greatest differences by nationality involved interaction with other tourists, socializing with other tourists, and taking photographs. In these variables, each

nationality was perceived to be different from the others. The least number of perceived differences involved which local foods and drinks were preferred and writing letters or postcards. The results of this study confirm to a certain extent the results obtained in previous studies, such as those of Brewer (1984), Boissevain and Inglott (1979), Pi-Sunyer (1977) and Wagner (1977), which demonstrated that residents and tourism employees perceive tourist behaviour to be affected by nationality. “Japanese life histories tend to emphasize personal interdependence more than independence, while American life histories emphasize independence more than interdependence; this seems to reflect a greater degree of cultural emphasis on the self’s inter dependence in Japan, and independence in the United States” (Markus and Kitayama, 1991 cited by Mathews, 1996 p. 721).

Tourists from different cultural backgrounds have different perceptions of quality. Asian tourists prefer the basic and practical aspects of service, giving higher ratings for variables such as “staff understanding your problems and needs,” and “responding effectively.” Western tourists prefer proactive aspects of service such as “made to feel welcome” and “willingness to help,” which suggests that Western tourists seek more intangible aspects of service that are over and above basic service provision. (Tsang and Ap, 2007). Expectations of hotel hospitality are influenced by personal factors such as gender, purpose of stay, nationality, and private domain of hospitality. The hotel’s star rating is the only hotel factor that might have a strong association with hotel hospitality (Ariffin and Maghzi, 2012), in so far as the higher the star rating, the higher the service expectation regarding hotel hospitality.

Wang and Kirilenco (2021) analysed 27,177 TripAdvisor Grand Canyon, USA reviews from visitors arriving from ten different countries, with the goal of identifying differences of opinion. They found that while all reviews tended to be positive, there are significant regional differences between European and Japanese tourists routinely expressing lesser satisfaction from their visit.

While for the Japanese, a guest is considered a god (Dace, 1995; Fields, 2000), in Western civilizations a guest is considered a king (Dace, 1995). Politeness in Japanese society is highly perceived in social interaction, especially politeness in business interactions where, in Japanese culture, customers must be served with a high degree of politeness as the customer is regarded as a god (Nudin et al., 2021).

Compared with the Chinese, the Japanese seem less comfortable when they are not shown politeness in situations where they would expect it (Tao, 2013).

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It is crucial for tourism and hospitality managers and employees to be aware of the influence that cultural differences have on tourists' perceptions and behaviour. Hence the importance of designing cross-cultural training programs to minimize and avoid dissatisfaction arising among tourists. While these programs should focus on the specific preferences of major cultural groups, human resources managers and trainers will also need to identify which attributes of service and relational service are universal in nature in order to develop a better understanding of different guests' needs and expectations. (Tsang and Ap, 2007).

According to Choi and Chu (2000), seven main factors influence traveller's perceptions and levels of satisfaction with Asian and Western hotels: Staff service quality, room quality, general amenities, business services, value, security and International Direct Dial Facilities. The main focus of Asian hotels is on the value factor, whereas the main focus of Western hotels is on the room quality factor.

Western cultures that downplay the importance of status differences, tend to provide service delivery styles that might not meet the expectations of Asian consumers (Matilla, 2000).

Japanese tourists attach more importance to emotional and novelty value, and Western tourists assign relatively more importance to the utilitarian dimension of value for money. Operators should also consider customizing their tour products to suit the specific needs of these different cultural groups (Williams et al., 2017).

According to Reisinger and Turner (1998), Japanese tourists tend to avoid risk, a fact that is backed up by Hofstede (1980) and Ameh and Krohn (1992). When they travel, however, they have to face several types of risk such as: poor performance of hospitality and tourism players, with the product and services not meeting expectations; financial risk, with the product not being worth the money it cost; time risk (a waste of time); physical risk, the tourism product could cause safety problems and be harmful, and poor product choice may result in embarrassment before others or be a blow to the tourist's ego; psychosocial risk; and cultural risk, or culture shock. The best sources to learn from and thereby take measures to reduce the Japanese tourists travel risks mentioned above are the shared personal experiences of family members, friends, and neighbours, through the power of word of mouth (WOM), a spoken, first-hand, in-person story as a customer review. This reflects collectivism and trust in one's groups of friends and family.

Collectivism and group harmony are also reflected in the way choice of destination is determined among the Japanese. A major consideration when choosing a tourist destination is

the effect the chosen destination will have on the family members. All members of Japanese families participate in choosing a holiday destination (Reisinger and Turner, 1998). In contrast, in the more informal western culture based on the principle of equality (Hofstede, 1980; Samovar and Porter, 1988), with Low-Risk Avoidance, ambiguity tolerance, new ideas and different behaviours (Hofstede, 1980), the focus is on individual objectives and needs (Hofstede, 1980). Thus, in western individualism with its focus on individual needs and individual well-being, belief in family relationship dependency is lower than it is in Japanese culture. Western values are centred more on democracy, equality and development of one's own work, than on co-existence (Nakane, 1973). And also on rapid decision-making processes, sometimes not planned, relaxed and without worries (Reisinger and Turner, 2000). What matters most is verbal communication, spoken and written (Hall, 1976), direct and explicit communication that focuses on arguments and facts. Silence, on the other hand means weakness (Condon, 1972).

The Japanese, being extremely keen on detail, aesthetics, quality, and service (Turcq and Usunier, 1985), are more demanding and have higher service expectations than other international tourists. They are driven by a Japanese service philosophy determined by cultural beliefs about how service should be properly performed (Reisinger and Turner, 1998).

Several studies have found that it is crucial for tourism and hospitality managers and employees to be aware of the influence that cultural differences have on tourists' perceptions and behaviour (Pizam and Sussmann, 1995; Armstrong et al. 1997, Weiermair, 2000; Matilla, 2000; Tsang and Ap, 2007; Reisinger and Turner, 2008; Choi and Chu, 2018; Wikhamn 2019). Personal characteristics need to be considered when staging experiences for potential guests (Wall et al., 2011).

The characteristics of national cultures should be taken into consideration when planning the tourist offers and marketing (Ozdemir and Yolal, 2017). Tourists from different cultural backgrounds have different perceptions of relational quality. Asian respondents reported lower ratings than their Western counterparts. (Zhang et al., 2015; Tsang and Ap, 2007)

The gaps in Tourism and hospitality management knowhow must be specified and corrective measures must be taken in areas such as: Intercultural management skills and know-how in managing the interface of the service encounter across the four tourism related cultures (culture of sending region, culture of host region, tourism and leisure cultures, organisation culture of tourism enterprises); Know-how concerning proper choice and implementation of

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market entry strategies in foreign markets (franchising versus management contracts, joint ventures, or greenfield investments, etc.); and Know-how concerning regionally/ culturally differentiated travel motivations and tourism behaviour of customers (Weiermair, 2000)

Different cultural backgrounds will have an impact on the levels of importance and satisfaction that tourists attach to various tourism services provided by hosts, and will also have an impact on the choice of destination (Resinger and Turner, 1998).

Cultural factors do influence behaviour intentions as hypothesized. Customers from cultures with lower individualism or higher uncertainty avoidance tend to have a higher intention to praise and to return if they receive positive service quality. However, they tend not to complain even if they receive poor service quality, which is true of both the Japanese and Asians in general. (Liu et al., 2007).

With the influence Japanese culture has on Japanese tourist behaviour, four main dimensions based on Hofstede's four national culture pillars were identified (see table 2.2). The contrast between the Japanese cultural pillars and the Western Cultural Pillars are as follows: the principle of hierarchy versus the equality principle; high risk avoidance vs low risk avoidance; collectivism vs individualism; and no verbal and indirect communication vs verbal and direct communication.

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Table 2.2: Hofstede’s four pillars of National Culture applied to Japanese Tourists

<p>Collectivism</p> <p>* Apologies to seniors of the group and gifts are given, politeness equals good manners, prevents conflicts or damage to reputation, preserves social harmony. Group activities such as group sightseeing, shopping, or dining, sharing a meal and travelling together (Resinger and Turner, 1998; Ahmed and Krohn, 1992).</p> <p>* Japanese were perceived to buy the most souvenirs (Pizam and Sussmann, 1995). The concept of “kinen”, collecting evidence of travel to prestigious tourist destinations (Ahmed and Krohn, 1992).</p> <p>* Focus on group cohesion and needs. Decisions are made by group consensus to avoid conflicts; group harmony is paramount. (Doi 1973; Shimaguchi 1978; Hofstede, 1980; Nakane 1973; Ziff-Levine,1990; Reisinger and Turner, 2002).</p>	<p>Hierarchy</p> <p>*Apologies to seniors of the group and gifts are given. Tourist’s social position and age (Resinger and Turner, 1998).</p> <p>*Hierarchical acknowledgment and power distance (Kluchhohn and Strodbeck , 1961; Isomura et. al., 1987; Samovar and Porter, 1988; Ahmed and Krohn, 1992; Matilla, 2000).</p>
<p>Risk Avoidance</p> <p>* Performance risk. Products and service could not fulfil the expectations, financial risk, the product will not be worth the money it cost, time risk (waste of time), tourism product will cause safety problems, poor product choice may result in embarrassment before others or a blow to the tourist's ego, psychosocial risk, cultural risk and shock (Resinger and Turner, 1998).</p> <p>* Personal experiences from family members, friends, and neighbours as the best source to reduce travelling risks (Resinger and Turner, 1998).</p>	<p>Non-Verbal Communication</p> <p>* Fulfilling social obligations, not revealing negative thoughts, avoiding negative answers and offence. Confidence is regarded with suspicion and even as rude behaviour. Punctuality means good manners, respect for others. Lack of prompt responses or punctuality means incompetence, unable to deliver quality. Japanese need to be occupied; in the event of delays, entertainment should be provided to reduce perceived waiting time (Resinger and Turner, 1998).</p> <p>* No verbal communication and silence mean strength (Condon, 1972; Hall, 1976; Ahmed and Krohn, 1992; Resinger and Turner, 1998).</p> <p>* Empathy, projecting the feelings of others and not expressing true personal feelings, including displeasure (Ahmed and Krohn, 1992). Concerns with aesthetics and details. Services marketed (Turcq e Usinier, 1985). Complaints to be shared when they return home (word of mouth). Expressing these feelings of displeasure are seen as somewhat negative and distrustful (Ahmed and Krohn, 1992; Reisinger and Waryszak, 1994).</p>

Source: Own Elaboration

According to this research information, it is possible to conclude that nationality matters and affects tourism behaviour.

2.3.2. Cross-cultural differences and tourist behaviour: Service Quality and Customer Satisfaction

As mentioned in Lu et al. (2015), numerous quantitative studies have shown that service quality is a predictor of customer satisfaction (Bitner et al., 1990; Cronin and Taylor, 1992; Gonzalez et al., 2007; Ramseook-Munhurrun and Naidoo, 2011; Sudin, 2011). Perceived service quality is part of a broader concept of customer satisfaction and behavioural intentions incorporating customer loyalty and WOM communication (Prasad, Wirtz, & Yu, 2014; Prentice cited in Berezina et al., 2016).

Hotel guests consider not only the economic value of staying in a particular hotel (price and quality) but also seek other values of a more affective nature, such as self-gratification, aesthetic pleasure, prestige, transaction, and hedonism. Customer satisfaction has a significant direct positive effect on customer loyalty (El-Adly, 2019). As cited in Crotts and Erdmann (2000, p.410), “the role of customer satisfaction in influencing repeat patronage and positive word of mouth is well-documented (Crotts, 1999; Augustyn and Ho, 1998; Kotler et al., 1998; Oppermann, 1998; Heskett et al., 1997)”.

The importance of Customer satisfaction to the hospitality sector is mainly based on the following aspects:

1) *physical attributes and commodities of the hotel room* (Berezina et al., 2016; Ekiz et al., 2012)

2) *performance of hotel employees* ((Berezina et al., 2016; Ekiz et al. (2012)). Hotels with a high focus on sustainable HR practices are likely to have more satisfied customers than hotels that have little focus on sustainable HR practices (Wikhman, 2019, Chand, 2010; Choi and Chu, 2000; Dhar, 2015; Tsaur and Lin, 2005; 2004), contented, well-trained employees are a competitive advantage (Ottenbacher, 2007).

3) *connection between service quality and customer satisfaction* (Berezina et al., 2016, Bharwani & Jauhari, 2013; Buttle, 1996; Crick & Spencer, 2011; Prentice, 2013; Torres & Kline, 2013; Yee, Yeung, & Cheng, 2010; Johnson et al., 2013) service quality is determined by customer perception of the level of service delivery (Zeithaml, Bitner, & Gremler, 2006). It is the degree of difference between the customers' expectations for service and their actual perceptions of performance (Parasuraman et al., 1985). Service quality, however, goes beyond

just efficiently satisfying needs. Technical service is moderately significant, and the importance of expressive service in memorable guest experiences is highlighted (Sipe and Testa, 2018). However, managers need to understand the importance not only of customer satisfaction but also need to take delight in directly driving customer loyalty. Managers need to understand customers' emotions (Kim et al., 2014).

2.3.3. Cross-cultural differences and Market Approach

The challenge is to incorporate the cultural behaviour of Japanese in marketing strategies (Reisinger and Turner, 1998). Characteristics of national cultures should be taken into consideration when planning the tourist offers and marketing (Ozdemir and Yolal, 2017). Understanding travellers' preferences and satisfaction is essential to better adapting the offer of products and services, as well as to developing different marketing strategies for each segment (Ahani et al., 2019; Mariani & Predvoditeleva, 2019; Xu, 2019; Xu et al. 2017; Zhou et al., 2014).

Differences in cultural values and rules of behaviour determine satisfaction, and the differences in perceptions of service determine interaction. Tourism marketers cannot rely on perceptions of service quality alone (anticipating and understanding needs, and being attentive), to generate Asian tourist satisfaction in inter- personal contact with western hosts. Ultimately, to ensure overall holiday satisfaction it is important for tourism marketers to use their knowledge of cultural differences in values and rules of behaviour to create service quality that satisfies perceptions. Marketers can best directly influence Asian tourist satisfaction through issues associated with cultural values (intellectualism, security, self-control) and rules of behaviour (proper terms of address, respect, and avoidance of public criticism) (Reisinger and Turner, 2008).

According to Reisinger and Turner (1998), three cultural dimensions have been identified as critical to the Japanese tourist market. These are: courtesy and responsiveness; competence; and interaction. The challenge for tourism marketers lies in understanding the cultural make-up of the Japanese market and developing culture-oriented marketing strategies.

It is also important to communicate through symbols, stories, images, and colours as, the American Hotels Chain Hilton did in 2014, creating a new website for their Japanese Income and Outcome tourists. The new website significantly improved usability and strengthened the connection with Japanese travellers, enriching their experience with the Hilton group. The

website has an intuitive, stunning, and visually rich design, featuring enticing full-screen images (Japan Today, 2014).

In the first exploratory interviews undertaken by the author, Nomura-san (Ex-Mazda Motor Europe Vice-President) shared the story of Cascais. Cascais, a coastal resort near Lisbon, is well known among the Japanese because the word Cascais is very similar to the last Samurai Family name KaishuSo, communication through these kinds of symbols and analogies are important to the Japanese. Mazda (the Japanese motor constructor) communicate the world best seller Miata (Mazda MX-5), through the analogy of men and machine working together as one. The so called “Jinba-Ittai”. Nature lessons, communication through colour and “fairy-tales” with a management objective are frequently used by Japanese Management. While on the one hand, the Japanese like long-term strategies, time to take decisions, and need group approval and harmony/consensus, on the other hand, they expect prompt and quick responses, a problem-solving attitude and punctuality. However, excessive confidence can be interpreted as a rude behaviour.

2.4. The most valuable hotel brand in the world (Hilton) and the most valuable Japanese company in the world (Toyota)

Hilton adopted its “customers really matter” strategy, which involves knowing their customers’ preferences in advance (Applegate et al., 2010; Liker and Meier, 2007, Huckestein and Duboff, 1999).

Today, Hilton is a leading global hospitality company, Hilton Worldwide is associated with the hospitality industry and has a presence in 118 countries with 5,405 franchised properties and 690 managed properties. Hilton is dedicated to fulfilling its mission to be the world’s most hospitable company by delivering exceptional experiences – at every hotel, to every guest, every time. The company's portfolio includes Hilton Hotels & Resorts, Waldorf Astoria Hotels & Resorts, Conrad Hotels & Resorts, Canopy by Hilton, Curio Collection by Hilton, DoubleTree by Hilton, Tapestry Collection by Hilton, Embassy Suites by Hilton, Hilton Garden Inn, Hampton by Hilton, Tru by Hilton, Homewood Suites by Hilton, Home2 Suites by Hilton and Hilton Grand Vacations. (Hilton Hotels Corporation website consulted in July 2019).

Hilton is the world’s most valuable hotel brand (Statista, 2020), as Figure 2.3.

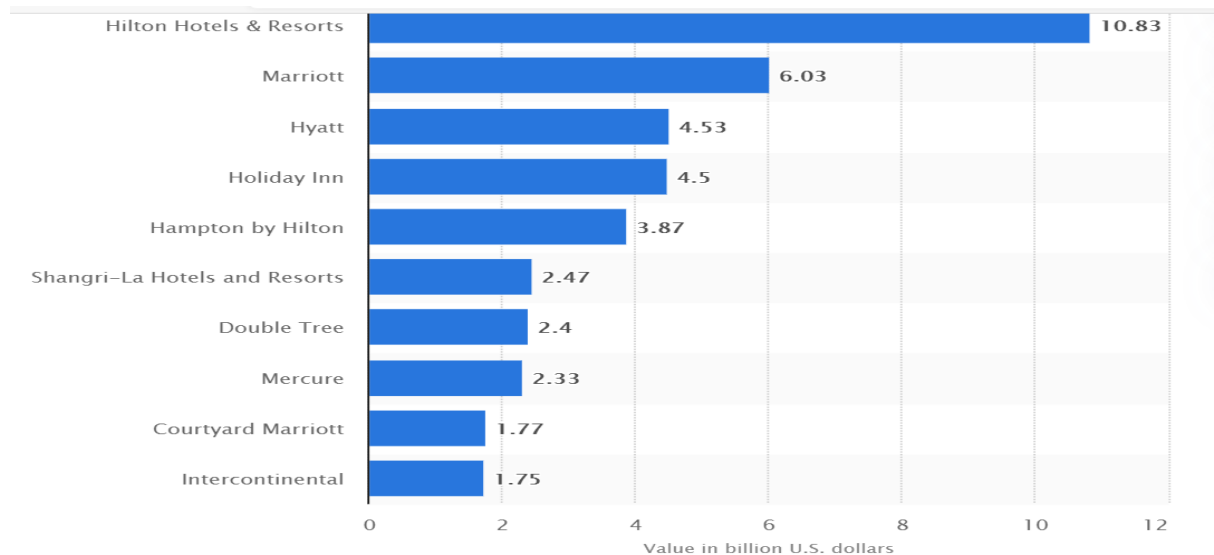


Figure 2.3: Leading hotel brands based on brand value worldwide in 2020

Source: Statista 2020¹

Similarities between Hilton and Toyota can easily be found:

- The role of the family throughout its history and long-term strategy (Applegate et al., 2008; Toyota Knowledge Centre, 2006).
- Dedicated to taking excellent care of their guests/customers through outstanding service-CRM: Customers Really Matter. Delivering on the Customers Really Matter promise. Knowing their customers' preferences in advance. (Applegate et al., 2008; Liker and Meier, 2007, Huckestein and Duboff, 1999).
- Communication through colour. For Hilton management, a green zone indicates that the company is meeting or exceeding its goals; a yellow zone indicates that results are slightly below the goal; and red means that performance is well below the goal (Huckestein and Duboff, 1999). Colour also plays a role at Toyota and is used in the same way as for the Hilton group; for example, to indicate how well sales teams are

¹ Hotel brand valuation methodology:

"In order to determine and compare the brand value of hotels, the Royalty Relief approach was used. It is a brand valuation method that includes various steps, such as calculating brand strength and estimating forecast revenues, and gives the company a better understanding of its position on the market" (Statista, 2020).

meeting their monthly goals, (the author has work experience in TTAF², TMC³ at 2009-2007). At Mazda, too, colours are used to classify the financial performance of their dealers. Green indicates dealers in sound financial health with no incidence of payment problems, yellow shows there are some difficulties, and red signifies dealers with serious payment problems (from the author's work experience at MMP⁴ and MMC⁵, 1999-1995).

- the Balanced Scorecard is a strategic management tool (Kaplan, R. and Norton, D.,1992) used by Hilton and Toyota where four dimensions of a company are analysed: Market and Customer, Processes and Procedures, People and Innovation and Finance, together with the "Hoshin Karin" (Plan-Do-Check-Act), a four- step model for carrying out change. Plan: Recognize an opportunity and plan a change. Do: Test the change. Carry out a small-scale study. Check: Review the test, analyse the results, and identify what you've learned. Act: Take-action based on what you learned in the study step. If the change does not work, go through the cycle again with a different plan. If you are successful, incorporate what you learned from the test to effect wider changes. Use what you learned to plan new improvements, beginning the cycle again. These are used as strategic management tools in both companies. Aligning the vision and involving people in the objectives of the company: employees as a whole, suppliers and all stakeholders involved in the business (Pinto, 2009; Huckestein and Duboff, 1999; the author's work experience with Toyota, 2007). Also, performance evaluation that links strategy, achievement of objectives and incentives policies applied in an objective and measurable way to everyone in the company overall.

2.4.1. Balance Scorecard

By the 1980s, many executives were convinced that to manage efficiently, they would need to step away from traditional financial measures and replace them with operational measures. Robert Kaplan and David Norton proposed a model called the balanced scorecard to track both financial and operational metrics. "What you measure is what you get". Senior executives understand that their organization's measurement system strongly affects the behaviour of

² TTAF- Toyota Tsusho Africa

³ TMC - Toyota Motor Corporation

⁴ MMP – Mazda Motor Portugal

⁵ MMC – Mazda Motor Corporation

managers and employees. The balance scorecard is like the dials in an airplane cockpit: it gives managers complex information at a glance (Kaplan and Norton, 1992).

According to Kaplan and Norton (1992), the Balanced Scorecard puts strategy – not control – at the centre. Executives may introduce new strategies and initiatives, but they will fail if they continue to use the same short-term financial indicators. They should question whether the new initiatives are compatible with the old measures. Measuring the objectives, must be an integral part of the management process. The Balanced Scorecard proposed in 1992 by Kaplan and Norton provided executives with a comprehensive framework. Much more than a measurement exercise, the balanced scorecard is a management system that can motivate breakthrough improvements in critical areas such as product, process, customer, and market development (Kaplan, R. and Norton, D., 1992).

As explained in the section defining the Balanced Scorecard, there are - according to Levdokymov and Zavalii, (2020) - four different ways of seeing the BSC: 1) as a tool for strategy implementation; 2) as a tool for strategy management; 3) as a system for strategy management; and 4) as a strategic performance management system. The reason there are different approaches to defining the BSC is due to the fact that the theoretical basis of the approach is constantly developing and evolving in accordance with the needs of management and the general challenges of society.

In this study, following the original concept of Kaplan and Norton, the Balanced Scorecard places the hotel strategy focus mainly on its four pillars: Customer and Market, Processes and Procedures, People and Finance.

Both companies (Hilton and Toyota) use the Balanced Scorecard concepts to summarize and take strategic decisions as follows:

The goals of the Hilton group were to create value for customers via a consistent value proposition that made owners, shareholders and employees (known as “team members”) strategic partners in the communities where each hotel is located. To achieve this, the company relies on the maxim that what gets measure and managed, gets delivered - which led to the company using the Balanced Scorecard (Huckestein and Duboff, 1999).

This is similar to what Toyota Management does internationally in their companies. As mentioned in Huckestein and Duboff (1999), the Hilton group has a business-planning process linked to a business strategy and a “fix it now” philosophy, like Toyota’s “Jidoka”, whereby the process is halted to fix a problem as soon as it is detected. In the same way that the Hilton

group includes an outside point of view; Toyota involves external parties, such as suppliers, in their production system. And, just as the Hilton group uses a continuous improvement process, so too, is continuous improvement one of the Toyota Way pillars. Both Hilton and Toyota use the Plan-Do-Check-Act, Hilton for consistency in business culture and Toyota for the Toyota Way all around the world.

Hilton Tokyo uses the Balanced Scorecard as its management system on a commercial level. The Balanced Scorecard is used by Hotel Hilton as a way to describe strategy, align metrics, and generally formalize its objectives (Johansson and Larsson, 2015).

In both companies (Toyota and Hilton), the four BSC perspectives mentioned in Levdokymov and Zavalii, (2020), are easily recognized. Both companies use the BSC as a strategy and strategy implementation tool and have in place strategic management and performance management systems. The BSC is used at Toyota and Hilton to implement their strategy, to measure “smart objectives” (objectives that are specific, measurable, attainable, realistic and time bound), and evaluate management performance. The four BSC perspectives (Customer, Processes and Procedures Standards and Physical Environment (Tangible factors), People Development and Human Interaction and Finance) will be further discussed as follows:

2.4.1.1. Customer Perspective

To achieve excellent service and customer satisfaction, it is crucial for the Hilton group to know their customers’ preferences in advance. (Applegate et al., 2008; Huckestein and Duboff, 1999).

Hilton achieved Brand Differentiation through Customer Relationship Management (CRM), as, indeed, did Toyota with its “the customer comes first” philosophy as the cornerstone of Toyota as a company. Customer first is law in Toyota and this command began with Sakichi Toyoda: “*Customer First*: More than a statement—it becomes the ‘first commandment’ for the Company, its products, and its people.” Sakichi Toyoda.

The Hilton group’s focus on customer experience became a passion to provide their guests with the best service by knowing who their customers are and how they would like to be treated. The Hilton group’s ethos ensures that customers not only get their preferences but that their expectations are exceeded. The company wants to know about their guests’ experience so they can improve and serve them better in the future (Hilton Hotels Corporation website consulted in July 2019; referred in Applegate et al., 2008).

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This Customer Relationship Management (CRM) approach of Hilton and Toyota transformed traditional marketing. Whereas the traditional marketing approach was a transaction, with a short-term focus, one transaction, broadcast approach, and one-way, one-time communication, the CRM approach is lifetime customer focused with multiple transactions, a sniper approach, two-way, continuous dialogue, and a segment of one (Piccoli et al., 2003).

In the long-term approach, the focus is on retaining customers for life; on getting to know customers to understand how they like to be treated. In order that they will stay a lifetime, it is first essential to understand their culture and their way of being and living, all of which is key to their behaviour as tourists. Hospitality managers need to understand customers' emotions (Kim et al., 2011).

Lu and Zhu (2019) conducted a study on the Difficulties and Countermeasures of the Hilton Hotel Group's Cross-Cultural Management in China. Their conclusions, although not directly related to Japan, are nevertheless informative: cultural differences lead to cultural conflicts and increase management costs. Customers, owing to their cultural differences, require different types and forms of services. Communication difficulties, even in English since we cannot assume that the Chinese will clearly understand everything said in English. With in-house training results not being good, in order to ensure the scale of training and technology release, the Group has set up a professional hotel management training school. It also cooperates with many colleges and universities to jointly improve the calibre of management and service level of hotel staff by combining theory with practice. The lack of unified corporate values and comprehensive management talent, need to be addressed, and a corporate employee culture needs to be strengthened.

Adopting a long-term strategy, the Hilton group solved the cross-culture issues by creating a policy of better understanding and win-win situations focused on cross-cultural training, improving the art and skills of cross-cultural communication, strengthening management skills in cross-cultural conflicts, paying attention to cross-cultural incentives, and choosing good expatriate managers.

Depending on a country's stage of development the travel priorities are different. For less-developed nations (which includes Portugal) the priorities are (from 1-the most important to 3-the least important): 1-service 2- food 3-location, and for more-developed nations (which

includes Japan): 1-location 2- service 3-food. Cleanliness is the most important for all (Magnini et al., 2011).

Complaints about Hospitality fall mainly under the following categories: “rooms”, “arrogant and/or clueless staff” and “failure to respond” (Ekiz et al., 2012).

Similar issues have been pointed out in earlier studies - from Reisinger and Turner (1999) on Japanese Tourists visiting Australia, to the study conducted in 2019 by Lu and Zhu concerning the difficulties the Hilton group had in dealing with Chinese tourists. From these studies, it is clear that to avoid complaints about service staff and problems with communication, better cross-culture understanding of Japanese and Chinese tourists is needed. Additionally, one of the main pillars of both Toyota and Hilton Management, namely *respect for others* is also evident and its importance with regard to pleasing Japanese customers is highlighted by Reisinger and Turner (1999) with comments such as: punctuality is a sign of good manners and respect, as well as a measure of professionalism and performance. Unpunctuality and the lack of a prompt response is interpreted as incompetence and inability to deliver quality. Waiting times must be reduced and should delays occur, they must be apologised for. The Japanese need to be occupied, if delays cannot be avoided, it is important that there is some sort of entertainment, or compensatory gift given to demonstrate respect for social position and age. This is a must.

Marketers of the luxury lodging industry must consider improving not only service quality and customer satisfaction but also perceived customer value in their offer. Ignoring customer value may cause lowered customer satisfaction and reduced repeat business (Oh, 1999). National culture is a measurable construct, and as it conditions how individuals interact with others, it should be taken into consideration when attempting to better understand consumers' needs and expectations (Crotts and Erdmann, 2000). The know-how concerning the regionally/culturally differentiated travel motivations and tourism behaviour of customers is crucial to understanding tourists' perceptions about satisfaction with service quality (Weiermair, 2000). As the tourism industry becomes more culturally diverse, future tourism and hospitality managers need to be equipped with a thorough understanding of the different cultural backgrounds of their customers (Reisinger and Turner, 2002).

2.4.1.2. Processes, Procedures and Physical Environment (Tangible factors)

The Japanese prefer a more personalized and proactive attitude from service providers to service based solely on efficiency and standardization (Dace, 1995; Fields, 2000; Lee and Zhou, 2003).

Within processes and procedures, and in relation to physical aspects, it is consistent with previous studies (e.g., Bitner, 1992; Schmitt, 1999; Zemke & Pullman, 2008) that environmental conditions (multisensory); space and functions; and signs, symbols, and artefacts are important aspects of a luxury hotel's physical environment. They are important to Toyota and Mazda Management, too (Wall et al., 2011, Toyota, 2007, Mazda, 2005). Customers complained frequently about the beds, reception services, and room size and decor (Li et al., 2014). Customer dissatisfaction frequently concerned tangible factors of their hotel stay, such as the furnishings and price (Berezina et al., 2016). Most Japanese could not endure more than a few days without having Japanese food (Kazuo, 1996)

Since it is evident that cultural differences determine customers' expectations of service and its required standard, tourism marketers and service providers should respond to the culturally accepted standards of the markets they serve (Resinger and Turner, 1998). This philosophy is implemented at Hilton and at Toyota as multinational companies.

To better meet the needs of their global customers, some hospitality firms already tailor their service offer and approach to communication to suit their customers' cultural background. For example, Hilton Hotels and Resorts launched their "Huan Ying" program (which means welcome in Mandarin) in 2011. Chinese customers can complete their check-in using their native language and enjoy room amenities and breakfast items commonly found at home. (Wang et al., 2015). There was also their approach to the Japanese market, using colours and pictures to create a unique and tailor-made website in Japanese. In 2014, Hilton Worldwide launched a new website for Japanese travellers. Timothy Soper, vice president, operations for Japan, Korea and Micronesia, Hilton Worldwide, said, "Japan remains equally important globally to Hilton Worldwide for both inbound and outbound markets, and we are committed to having the best possible services available to support our Japanese guests. The new website significantly improves usability, strengthens our connection with Japanese travellers and enriches their experience with us." The site has an intuitive and stunning, visually rich design, featuring enticing full screen images. (www.japantoday.com, consulted in July 2019), simplifying the processes for ease of understanding.

2.4.1.3. People Development and Human Interaction

The Japanese see education as a preparation for life.

Toyota takes “people development” seriously and demonstrates this in its pillars of Toyota Way: People Development and Continuous Improvement implemented all around the world. With the same aim in mind as Toyota, to have – customers for life – the Hilton group created a dedicated Hilton university (Conrad) for people development.

Compared, for example, with American and Taiwanese customers, Japanese customers (tourists) have the highest expectations of hotel employees and are very difficult to satisfy. National culture plays a significant role in shaping customer expectations of service performance. Hospitality managers devise effective differentiation strategies that will best suit their customers’ preferences and interests, and thus increase customer satisfaction and intention to return (Zhang et al., 2015).

A study of Japanese tourists in Australia (Reisinger and Waryszak, 1994), revealed that although Japanese tourists perceived local providers positively on arrival in Australia, their perceptions of Australian providers were significantly less favourable on departure. Hotel and food establishment employees and shop assistants were perceived as significantly less concerned about tourist needs, less helpful and less informative; Australian tour guides were perceived as less knowledgeable of Australian history and culture; and all the Australian providers were perceived as significantly less able to speak the Japanese language than tourists had expected, prior to their arrival in Australia. The problems encountered with service generated quite a high level of dissatisfaction among Japanese tourists as the service they received did not match their expectations. The extremely high expectations of service of the Japanese might also be one of the reasons for the declining number of Japanese tourists visiting Australia.

The Japanese mainly complained about: the lack of professional service in restaurants; poor organisation of tours; lack of good manners by service staff and slow service (Reisinger and Turner, 1998,1997).

Personal characteristics need to be considered when staging experiences for potential guests. Additionally, frontline employees should be trained and guided on how personal characteristics influence guests’ expectations and behaviour in the consumer experience process. Human interactions are a crucial part of their luxury hotel experiences. Four themes emerged as important factors affecting their hotel stay experience when human interactions

with employees are considered: attitude, professional behaviour, proactive service, and appearance (Wall et al., 2011).

Cultural differences also show up in human relationships: individualism vs. collectivism, and power distance. Compared with the Taiwanese and Americans, and entirely owing to cultural differences, the Japanese have the most rigid requirements for service attitude.

Given the evidence that different elements of employee service attitude significantly affect the customer satisfaction of each nationality represented, hotel managers need to adjust marketing planning and personnel training accordingly. Japanese tourists emphasise the importance of employees solving problems quickly and efficiently, and of employees keeping alert to all possible incidents and accidents. (Kuo, 2007). Managers need to understand which categories of products and services provide affective or cognitive experiences capable of driving more customers to delight in upscale hotels. They should value delight more in upscale hotels that demand more of delight-oriented experiences and strategies (Lee and Park, 2019)

As previously evidenced, the need to provide cultural training for the tourism and hospitality industry employees is imperative. International tourists with different cultural backgrounds have different perceptions of the relational quality provided by guest contact employees; these differences should be used in the design of cross-cultural training programs to minimize and avoid dissatisfaction arising among tourists (Tsang and Ap., 2007).

As the tourism industry becomes more culturally diverse, future tourism and hospitality managers should understand their customers from different cultural backgrounds. Cultural awareness, better communication, and interpersonal skills will be necessary to avoid and/or reduce tensions and develop understanding between international tourists and hosts with different cultural values. Cross-cultural awareness studies should be incorporated into tourism and hospitality programs offered at tertiary institutions (Reisinger and Turner, 2002).

Staff service quality is one of the most influential factors in determining the overall satisfaction levels among both Asian and Western travellers (Choi and Chu, 2000). Hospitality firms might benefit from providing cultural training for their customer-contact employees (Matilla, 2000).

Reisinger and Turner (1999), in their paper concerning inbound Japanese tourism to Australia, explained the declining numbers of Japanese visitors to Australia as being a result of dissatisfaction with services, which tended to be abrupt and impolite. Training courses in communication style and understanding the meanings of Japanese words and expressions should be organised. Such training would show how to differentiate between what is said and

what is actually meant, and how to understand the real intentions of the Japanese. While expectations of service differ from culture to culture, the overall evaluation of service quality is more a function of service performance (Armstrong et al., 1997).

Hospitality requires a thorough understanding of what will please the guest. For that, service organizations are empowering frontline employees to handle service problems themselves. However, the entire organization must be structured to provide the support these employees need in order to deliver the desired level of service. It must provide training in social as well as job skills and foster a culture that emphasizes the importance of respect for people (King, 1995), which is the main pillar of Toyota philosophy.

2.4.1.4.Finance

Finance is one of the basic pillars for sustainability and long-term strategy. Toyota and Hilton are the most valuable companies in their sectors of activity. They have long-term vision, and they are very profitable. They adapt their company policies and behaviours to the needs of the market and customer and that, it seems, is the secret to being a respectable, trustworthy, reliable and *customer for life* company. In 2021, Lexus (Luxury Cars Segment of Toyota Group), Mazda and Toyota are the companies making the most reliable new cars (Consumer Reports, 2021). Hilton, as a brand, is the first choice of guests, team members, and owners.

The profit-service chain depends on delivery systems, employee satisfaction and retention and, of course, guest satisfaction and retention. The Japanese inbound travel market has great potential (Lee and Zhao, 2003), in the case study related to USA market, which is a great incentive for U.S. hotels to customize products and service offerings and maximize their return on investment.

When choosing a destination, price is more important for the Chinese than for the Japanese (Assiouras et al., 2015). Japanese tourists were not perceived to bargain and mostly paid the asking price (Pizam and Sussmann, 1995). Japanese tourists were the biggest spenders in Spain in 2019 (Turespana-Fijas ejecutivas by market, 2019), with the added value that the Japanese are known to be very respectful of people and things in general, treating them with care and respect. This is essential to avoid unnecessary costs for maintenance or replacement, which can be very high in the hospitality industry. The operating efficiency and profitability efficiency of hotels are highly correlated (Xu,2017).

2.5. Outbound Japanese Tourists

Travel Preferences and Motivations

In 2019, the top destinations in Europe for Japanese tourists were: Germany, Spain, France, Italy and Hungary (Turismo de Portugal, BI, 2019).

The Japanese state office use the Japanese company named “JTB Tourism Research and Consulting Co” to supply all the statistics concerning Japanese tourism, which is why this company was chosen as the secondary data source preference for this study. Concerning their research for 2016, the Outbound Japanese Tourists top 3 travel preferences were: see and experience nature and scenery, visit historic sites and architecture; and sample local cuisine and favourite food. The Japanese travel mainly to experience the unknown and extraordinary world.

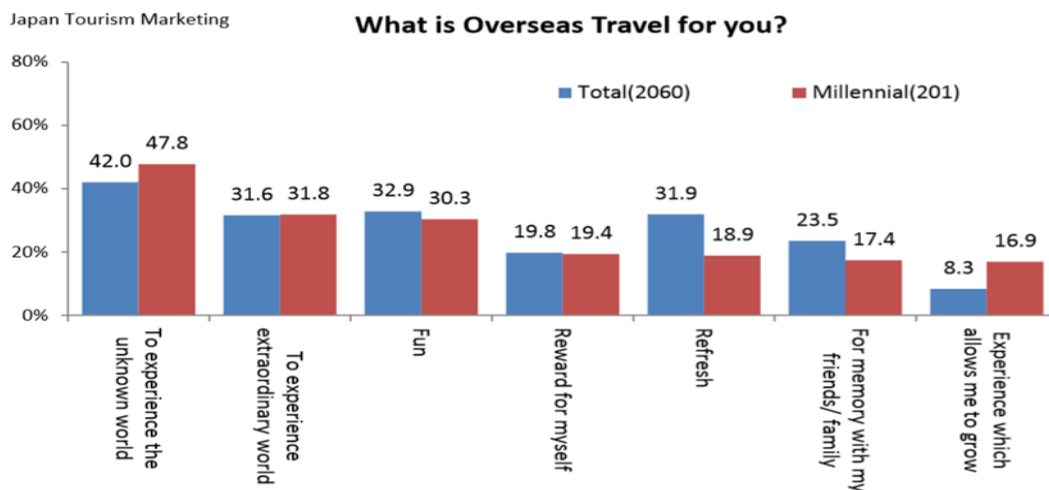


Figure 2.4: Japanese Tourists - Travel Motivations

*Source: JTJ Tourism Research & Consulting Co / www.tourism.jp.
 Japanese international travelers: trends and shopping behavior (2015)*

Figure 2.4. compares the travel motivation of the sample, a total of 2060 Japanese tourists travelling abroad (blue colour), and the Millennial travel motivations (201 Japanese tourists – red colour).

The tendency is similar in almost all categories apart from “experience which allows me to grow” where the Millennials’ response is double, and “Refresh” where the total response is much higher than only the Millennials. This is obviously understandable as older people seek refreshment and younger people are still in the process of growing. For both groups analysed, more than 40% travel overseas “to experience the unknown world” and more than 30% “to experience the extraordinary world”.

To cite from Assiouras et al. (2015, p. 1391): “According to Dann’s pioneering work (1977), the push factors for a vacation are socio-psychological motives explaining the desire for travel, while the pull factors are motives emerging from the destination, thus explaining the destination choice. Following this line of reasoning, people travel because they are pushed into making this decision by internal forces and pulled by external forces of the destination attributes (Uysal & Jurowski, 1993).” Taking into consideration the push and pull concepts, Assiouras et al. (2015) conclude that the Push Motivations of Japanese Tourists (visiting Greece) were: 1) Novelty, 2) Knowledge 3) Escape and Relaxation 4) Ego-enhancement, and the Pull Motivations of the Japanese were: 1) Natural scenery and landscapes 2) Culture and Heritage 3) Leisure and shopping 4) Variety and cost.

In comparison, the Push Motivations of Chinese tourists were: 1) Knowledge 2) Novelty 3) Escape and Relaxation 4) Ego-enhancement, and their Pull Motivations were: 1) Natural scenery and landscapes 2) Culture and Heritage 3) Variety and cost 4) Leisure and shopping. These preferences are confirmed by the outcome of the exploratory interviews, where the pull factors of a country were natural scenery and historical and cultural heritage.

While Japanese tourists attached more importance to emotional and novelty values, western tourists attached relatively more importance to the utilitarian aspects of value for money (Williams et al., 2017).

These statistics and the conclusions of the studies cited are in line with Watkins and Gnoth (2011), who found that nature is, in fact, a very important Pull factor connected with the Japanese Culture, where Personal Values, Long-term philosophy and sustainability are present in and influence consumer behaviour. A preference for luxury is confirmed by the Japanese tourists’ choice of 4 stars and 5 stars hotels. Adventure tourism is related more to novelty than to risky activities, since the Japanese prefer to avoid risks. Given this propensity to avoid risk and uncertain situations, security is very important to them, so a number one concern is how safe a particular destination is. In this study’s exploratory interviews with the Japanese, security concerns were also pointed out as a disincentive to travel abroad to a specific country (pull factor). Physical risk, health risk, and psychological risk perceived by Japanese tourists negatively affect their image of a destination; destination image improves destination satisfaction; destination has a moderating effect on the relationship between two risks (physical and health) and destination image (Sohn, 2016). Covid-19 issues aside, Portugal has the perfect conditions to attract Japanese tourists as it can offer products aligned with Japanese preferences. In 2020, it was considered the third safest country in the world (Iceland and New Zealand took the first two positions), and the fourth safest in 2021 (Denmark took third place) according to

the Global Peace Index 2021. This is in line with the priorities in figure 2.4, where concern about security is highlighted as a reason not to travel to a country.

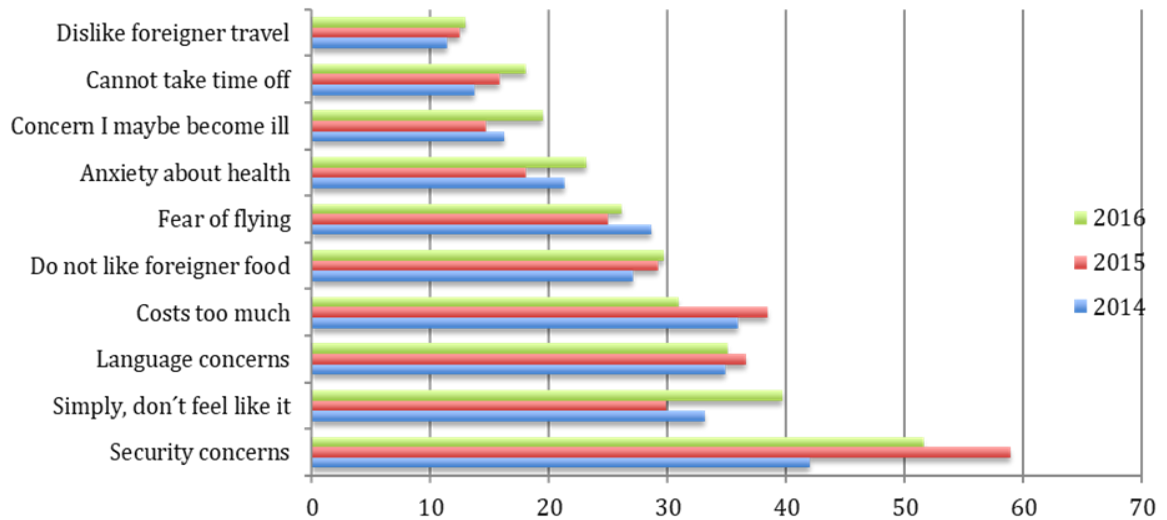


Figure 2.5: Japanese Tourists – Reasons for not travel

*Source: JTB Tourism Research & Consulting Co –
 "Opinion Survey of Overseas Travel Preferences, 2016"*

2.6 Research Model (Country of Reference: Portugal)

A review of the Literature contributed to our understanding of the unique Japanese culture, Japanese tourist behaviour, and the differences between Japanese and western tourists' hotel preferences. The Balanced scorecard dimensions are used by the most valuable companies in the world (Japanese: Toyota and Hospitality: Hilton) as a strategic tool. Two main dimensions could be identified: Market/Customer Dimension and Portuguese Hospitality Dimension. A comparison of both revealed the Gap between them. An improved plan can be proposed to contribute towards developing a strategy for Luxury Hotels to meet Japanese customers' expectations. The Conceptual Model is shown in Figure 2.6. below:

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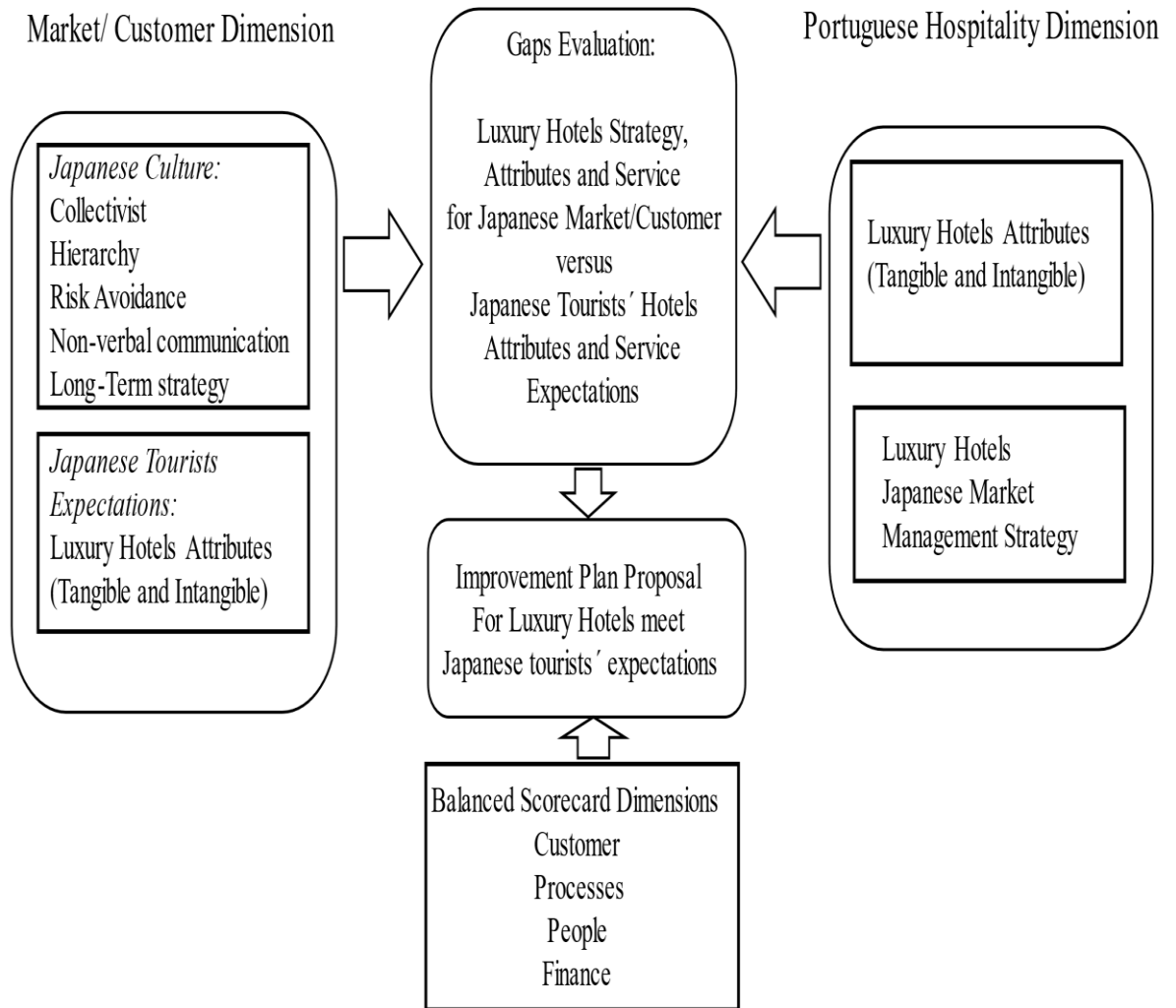


Figure 2.6: Research Model

Source: Own Elaboration

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Chapter 3. Methodology

3.1. Objectives and Research Questions

The main purpose of the study is to offer advice for improvement and suggest future strategies to help the hospitality sector achieve sustainable growth concerning income Japanese tourism in Portugal.

To achieve this main objective, the study was divided into sub-objectives as follows:

- 1) To understand Japanese Culture and Management.
- 2) To understand the Japanese Tourist.
- 3) To understand the Most Valuable Hospitality Company in the world (Hilton) and the Most Valuable Japanese Company in the world (Toyota).
- 4) To understand which hotel attributes are positive and which are negative hotel (tangible and intangible) for Japanese and Chinese tourists. Finding similarities and differences.
- 5) To understand Portuguese hospitality strategy for the Asian Market in general, and Japanese and Chinese specifically (before and after covid). To understand the strategy of management in the hospitality sector management, as well as the strategy of managers experienced in dealing or working with Japanese but operating in other sectors of activities (thinking outside the box).
- 6) To reach conclusions about the fit or mismatch between Japanese customers' expectations of hospitality, and Portuguese hotel strategy for the Japanese market/customer.
- 7) To propose a strategic plan for improvement so that the attributes of Portuguese luxury hotels can meet the expectations of Japanese customers.

Sub-objectives 1), 2), 3) and 4) were achieved through Literature Review. Sub-objective 3) revealed a strategic management tool that Hilton and Toyota have in common, the Balanced Scorecard which led us to the Balanced Scorecard Dimensions (Customer/Market, Processes and Procedures, People Development, Finance), forming the basis of Interviews Guidelines and Questionnaires structure. Objective 4 was achieved through content analysis of booking.com reviews by Japanese and Chinese hotels customers. Subobjective 5 was achieved through interviews/questionnaires. Subjective 6 compared the outcomes of 1), 2), 3) 4) with 5). Sub-objective 7) was built based on the outcome of sub-objective 6).

3.2. Population and Sample

3.2.1. Tourists in Portugal – General Statistics

Over recent years, the Portuguese hospitality Market has changed in both quantity and quality, while in the past, the market was full of traditional and standard chain hotels, today these are mixed with standard chain hotels, boutique, and historical hotels where Portugal's proud footprint has been firmly stamped and is highly relevant. In addition, with the rise of tourism in recent years (apart from atypical year 2020, due to the covid-19 pandemic), greater and more opportunities opened up in the market for independent hotels chains and local accommodation (AL). The rich cultural heritage of Europe is an important pull factor for Asian visitors (Arlt, 2006; Bui and Trupp 2020).

In 2019, Portugal was host to a record 27 million tourists, 16 million of who were from foreign countries. Of these 16 million foreigners, 5,9 million visited Lisbon, making it, the most visited region in Portugal, as detailed in Table 3.1.

Table 3.1: *Number of tourists by inbound country and by Portuguese Region in 2019*

Country	North	Center	Lisbon	Alentejo	Algarve	Azores	Madeira	Total
Germany	224 599	88 310	442 257	52 394	358 495	72 893	281 952	1 520 900
Belgium	59 366	26 726	114 822	14 875	67 665	14 663	25 229	323 346
Brazil	310 883	198 635	604 097	57 556	82 012	5 658	11 380	1 270 221
Canada	73 401	35 363	156 963	18 884	67 458	19 196	7 296	378 561
China	60 763	20 754	250 567	31 785	16 215	1 344	1 539	382 967
Dinamark	21 692	7 456	40 595	3 528	23 247	8 997	38 395	143 910
Spain	670 724	389 533	636 798	103 529	406 736	34 028	36 681	2 278 029
USA	229 663	96 869	621 549	54 561	105 973	66 926	14 663	1 190 204
France	347 037	168 085	575 532	46 502	291 791	33 227	147 999	1 610 173
Netherlands	85 790	40 826	170 164	23 809	201 393	19 643	53 034	594 659
Ireland	30 352	12 108	93 723	4 209	266 298	1 726	4 795	413 211
Italy	148 122	102 135	322 235	24 924	87 771	15 081	12 797	713 065
Poland	38 111	39 806	70 768	4 345	72 855	4 018	47 088	276 991
UK	184 745	50 747	389 561	30 348	1 191 254	21 046	279 623	2 147 324
Sweden	16 539	9 087	72 505	4 227	42 645	3 572	34 024	182 599
Switzerland	63 507	23 329	108 953	13 264	52 882	12 887	27 050	301 872
Japan	34 206	16 031	85 032	1 662	4 504	536	2 037	144 008
Other Foreigner	481 315	314 187	1 143 237	51 251	255 494	47 782	136 514	2 429 780
Total Foreigner	3 080 815	1 639 987	5 899 358	541 653	3 594 688	383 223	1 162 096	16 301 820
Portugal	2 745 717	2 481 424	2 209 526	1 044 493	1 479 079	391 211	320 547	10 671 997
Total	5 826 532	4 121 411	8 108 884	1 586 146	5 073 767	774 434	1 482 643	26 973 817

Source: Turismo de Portugal, Travel BI (2019)

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In 2019, comparing Portugal with Spain, the income per tourist is higher in Portugal but, there is a huge difference by nationality. The Japanese are the number one, concerning income per tourist in Spain, followed by the Chinese. In Portugal, the income per Japanese or Chinese tourist is the lowest comparing with other nationalities, as detailed in Table 3.2. Trying to understand this huge difference between Portugal and Spain, it was found out through an interview to a hospitality expert, that Spain made a huge marketing campaign to attract the Asian customers through the slogan “Madrid la mejor tienda del mundo”, “Madrid Destino 7 Estrellas, la Mejor Tienda del Mundo”, “Barcelona la major tienda del mundo” attracting the tourists to the country and increasing the tourism of shopping. This can be a very interesting subject for a study itself, suggested in the future research proposals at chapter 5.

Table 3.2: *Income number and Income per tourist: Portugal versus Spain in 2019*

Country	PORTUGAL				SPAIN			
	Income Millions of Eur	Number Tourists 000's Eur	Income per tourist Eur	Nº Nights per tourist	Income Millions of Eur	Number Tourists 000's Eur	Income per tourist Eur	Nº Nights per tourist
UK	3 286	2 147	1 530	4,4	17 985	18 078	995	3,1
France	2 600	1 610	1 614	2,8	7 597	11 157	681	1,6
Germany	1 983	1 521	1 304	3,9	11 722	11 177	1 049	3,8
Spain/PT	1 949	2 278	856	2,3	959	2 440	393	1,8
USA	1 293	1 190	1 086	2,3	5 809	3 333	1 743	2,4
Brazil	735	1 270	579	2,3				
Nether-lands	708	595	1 190	4,0	4 157	3 702	1 123	2,4
Ireland	703	413	1 701	4,3	2 385	2 177	1 096	2,3
Italy	472	713	662	2,4	3 566	4 542	785	2,2
Belgium	378	323	1 170	3,2	2 696	2 539	1 062	2,5
China	225	383	588	1,6	1 323	699	1 893	3,2
Japan	53	144	371	1,9	1 481	686	2 159	1,9
Others	4 045	3 714	1 089	2,8	24 021	31 748	757	2,2
Total	18 431	16 302	1 131	3,0	83 701	92 278	907	2,5

Source: Turismo de Portugal, Travel BI (2019) & Turespaña (2019)

Hotels in Portugal and particularly those located in the Algarve are worried whether there will be tourists from the UK. However, although UK tourists account for a huge proportion of

Portugal's income tourists, they are not the biggest spenders on average. The biggest spending tourists are those coming from Ireland and France.

3.2.2. Tourists in Portugal – Accommodation Type Preferences

70% of tourists in Portugal showed a preference for hotel as accommodation type as Figure 3.1.

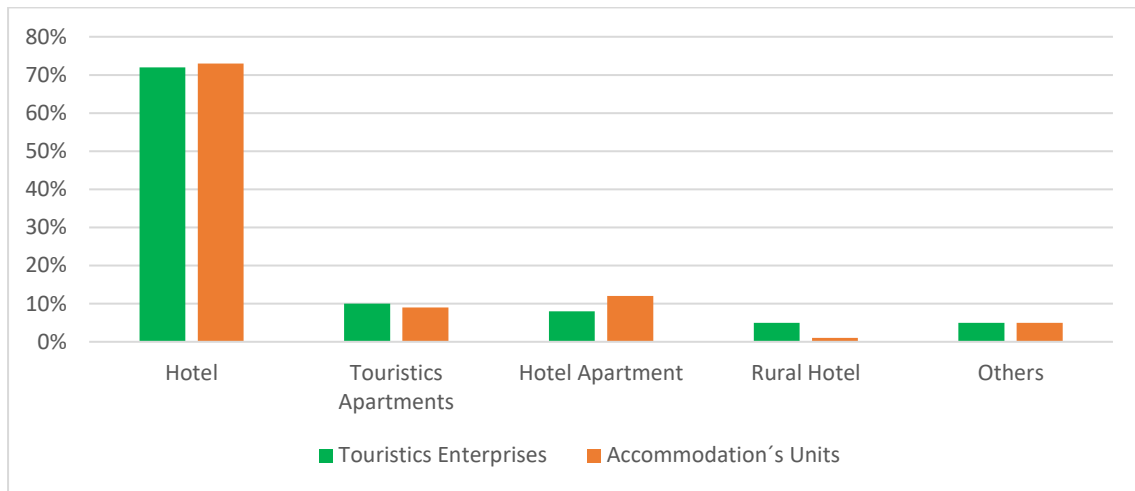


Figure 3.1: 2019 Accommodation type

Source: Atlas de Hotelaria, Deloitte (2019)

The main hotel chains operating in Portugal are: Pestana, Vila Galé, Accor Hotels, Minor Hotels, Hoti Hotéis/ Meliá Hotels & Resorts, Marriott Hotels & Resorts, Sana Hotels, Vip Hotels, InterContinental Hotels Group – IHG, DHM - Discovery Hotel Management, Dom Pedro Hotels, NAU Hotels & Resorts, HF Hotéis Fénix, Porto Bay Hotels & Resorts, Hotusa Hotels, Hotéis Real, Turim Hotels, MGM Muthu Hotels, Luna Hotels and Resorts and Continental Hotels. Together they account for 31% of the total accommodation units with other groups accounting for 34% and independents for 35% (Deloitte, 2019).

3.3. Population and Sample

3.3.1. Japanese and Chinese Tourists

3.3.1.1. Hotel Type Preferences

In 2019, 144.007 Japanese visited Portugal, 59% (85.032) of whom visited Lisbon. In the same year, 378.561 Chinese visited Portugal, with 66% (250.567) visiting Lisbon (Travel BI, 2019).

The preferred accommodation of the Japanese and Chinese in Portugal is in line with the tendency of global inbound tourist, which is to stay overnight in hotel type accommodation, as Figure 3.2.

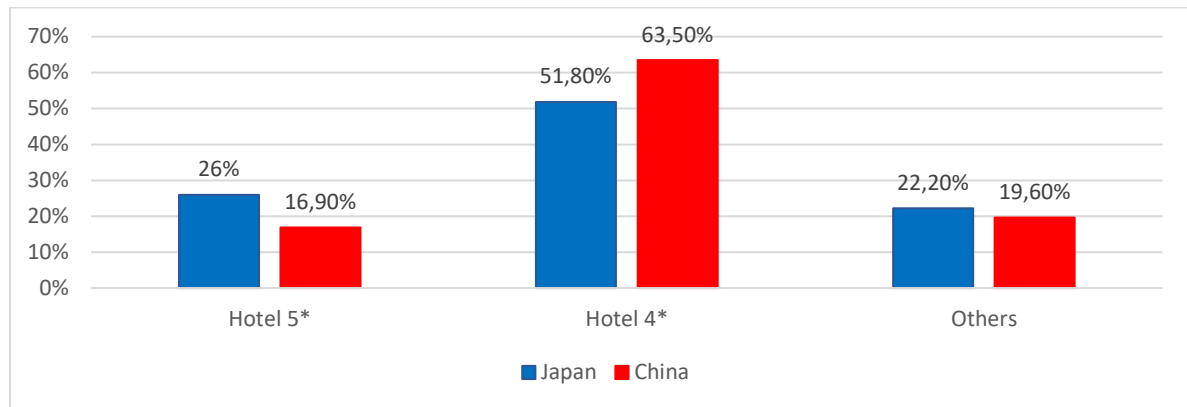


Figure 3.2 *Accommodation's type preferences of Japanese and Chinese Tourists*

Source: Turismo de Portugal, Travel BI (2019)

In 2019, the type of accommodation that 78% of all Japanese tourists and 81% of all Chinese tourists preferred was 5 stars and 4 stars. Data for that year show there are 674 luxury hotels (5 and 4 stars) distributed by region as follows: North: 149 hotels, Centre: 95 hotels, Lisbon Metropolitan Area: 166 hotels, Alentejo: 37 hotels, Algarve: 134 hotels, Azores: 34 hotels and Madeira: 59 hotels.

This research focused on 5 stars and 4 stars hotels (designated luxury hotels) operating in the Lisbon area. In these upscale hotels, in contrast to economy hotels, guests are more likely to expect above the basic services (Lee and Park, 2019). According to the statistics of Turismo de Portugal, of the 166 hotels operating in Lisbon metropolitan area in 2019, 47 were 5 starts hotels and 119 hotels were 4 starts hotels.

Lisbon Metropolitan Area is divided in 18 areas: 1) Mafra, 2) Sintra, 3) Cascais, 4) Loures, 5) Odivelas, 6) Amadora, 7) Oeiras, 8) Vila Franca de Xira, 9) Lisboa, 10) Alcântara, 11) Montijo, 12) Moita, 13) Barreiro, 14) Seixal, 15) Almada, 16) Palmela, 17) Setúbal and 18) Sesimbra.

3.3.1.2. Sample Analysis

This study used the online hotel reservations channel, booking.com, to source customer reviews of the luxury hotel chains operating in Lisbon Metropolitan Area. Analysis of online reviews has become an indispensable marketing tool for managers because their content provides key information to help them allocate resources more appropriately to enhance service and thus increase profits. Customer generated media can be used in several different ways, to suit whatever purpose hoteliers and scholars might have (Oliveira et al., 2020). While positive reviews

have been shown to improve hotel revenue (Phillips et al., 2017), negative reviews can lead to a reduction in hotel bookings (Tsao et al., 2015). On social media, Trip Advisor reflects the real differences of opinion of visitors of different origins. There are significant regional differences among Europeans and Japanese tourists routinely express less satisfaction with their visit. (Wang and Kirilenko, 2021).

Several studies have already been based on text analysis of on-line reviews: (Litvin et al., 2008; Magnini et al., 2011; Ekiz et al., 2012; Zhou et al., 2014; Berezina et al., 2015; Zhang et al., 2015; Liu et al., 2017a; Xu, 2018; Gunasekar and Sudhakar, 2019; Hu et al., 2019; Li et al., 2020; Wang and Kirilenko, 2021). These studies covered satisfaction with hotel products and services and their overall impact on customer satisfaction overall. Guests of luxury hotels rate the hotels significantly higher than guests rate midrange and budget hotels (Gunasekar and Sudhakar, 2019). However, in contrast to the guests of economy hotels, guests of upscale hotels generally expect more than the basic services (Lee and Park, 2019).

Of the 166 hotels located in the Lisbon Metropolitan Area (Turismo de Portugal, 2019), 152 were listed at booking.com (47 - 5-star hotels and 105 – 4-star hotels) between May 1st and June 30th, 2020. Hotels over 10 km from Lisbon city centre registered few or zero Japanese comments and for that reason were excluded from the sample for analysis. Analysis of hotels in the Lisbon Metropolitan Region focused on region n° 9 – Lisbon, covering a total of 123 hotels announced on booking.com

The Top 10 hotels were selected in accordance with 2019 Deloitte study, Atlas da Hotelaria, These hotels account 71% of Portugal's main hotel chain accommodation units (31.659 units out of 44.492). Added to these were hotels that had more than 20 reviews from Japanese tourists, and the boutique hotel, Britania (part of Heritage Chain) which has 17 Japanese reviews and zero Chinese reviews.

Ratings on Booking.com are presented on a scale from 1 to 10: 1 is bad and 10 wonderful, below 6 is no satisfactory, 6+ = pleasant, 7+ = good, 8+ = very good, 9+= wonderful. The comments are separated into positive and negative, and an overall rating is shown. The reviews are automatically updated by booking.com systems and those over 24 months old are deleted.

Summary of Lisbon hotels sample and sample analysis in Appendix D. Sample analysis detailed as Table 3.3.

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Table 3.3: Lisbon Luxury Hotels Sample Analysis

#	Hotel Name	Starts	Location	General Aver. Score	Analysis			
					Review Number Japanese	Aver. Score	Review Number Chinese	Aver. Score
	Top 20 Hotel Chain- Atlas da Hotelaria (Deloitte, 2019)							
	1-Pestana							
1	Pestana Palace	5	Lisbon	9.0	1	9.0	0	
2	CR7	4	Lisbon	8.9	1	10.0	7	9.1
	2-Vila Galé							
3	Vila Galé Opera	4	Lisbon	7.9	3	9.2	7	8.0
	3-Accor							
4	Sofitel Lisbon Liberdade	5	Lisbon	8.8	10	8.2	11	8.1
5	Mercure Lisboa	4	Lisbon	8.0	3	8.8	9	8.3
	4-Minor							
6	Tivoli Av. Liberdade	5	Lisbon	9.1	7	8.6	14	8.6
7	Tivoli Oriente	4	Lisbon	8.7	8	8.2	38	8.9
8	Novotel Lisboa	4	Lisbon	8.0	4	6.5	11	8.4
9	NH Campo Grande	4	Lisbon	8.3	3	8.6	8	8.7
10	Avani Av. Liberdade	4	Lisbon	8.6	2	8.1	2	7.1
11	NH Liberdade	4	Lisbon	8.9	1	8.3	3	7.5
	5-Hoti-Hoteis							
12	Tryp Aeroporto	4	Lisbon	8.7	50	8.1	42	8.5
13	Melia Oriente	4	Lisbon	8.4	15	8.2	17	8.1

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#	Hotel Name	Starts	Location	General Aver. Score	Analysis			
					Review Number Japanese	Aver. Score	Review Number Chinese	Aver. Score
	6-Marriott							
14	Sheraton Lisboa	5	Lisbon	8.6	5	7.5	6	5.9
15	Memmo Principe Real	5	Lisbon	9.2	1	10.0	3	9.6
16	Lisboa Marriott	4	Lisbon	8.2	3	7.8	8	6.8
	7-Sana							
17	Epic Sana Lisboa	5	Lisbon	9.2	11	9.1	26	9.0
18	Myriad	5	Lisbon	9.3	8	9.1	51	9.0
19	Sana Evolution	4	Lisbon	8.9	5	8.5	17	8.7
20	Sana Malhoa	4	Lisbon	8.6	4	9.2	19	8.5
21	Sana Metropolitan	4	Lisbon	8.3	1	7.1	14	8.7
	8-VIP							
22	VIP Grand Lisboa	5	Lisbon	7.9	1	7.1	12	7.9
23	VIP Executive Arts	4	Lisbon	8.1	5	7.2	24	8.2
24	VIP Executive Picoas	4	Lisbon	8.8	5	8.9	5	8.8
25	VIP Saldanha	4	Lisbon	7.5	1	6.0	0	
26	VIP Entrecampos	4	Lisbon	7.6	3	7.4	10	8.1
	9-Intercontinental							
27	Intercontinental Lisboa	5	Lisbon	8.8	5	7.5	3	9.7
28	Holiday Inn Continental	4	Lisbon	8.2	10	8.4	13	8.1
29	Holiday Inn Lisboa	4	Lisbon	7.9	3	7.2	17	7.9
	10-DHM							
30	Ramada Lisboa	4	Lisbon	8.4	12	8.0	69	8.6
	Sub-total Top 1 to 10			8.5	191	8.2	466	8.3

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#	Hotel Name	Starts	Location	General Aver. Score	Analysis			
					Review Number Japanese	Aver. Score	Review Number Chinese	Aver. Score
31	16-Real Hotel Real Palácio	5	Lisbon	8.3	22	7.4	8	8.8
32	17-Turim Turim Terreiro Paço	4	Lisbon	8.1	28	8.4	34	8.2
33	Turim Av. Liberdade	4	Lisbon	8.1	23	8.2	46	8.1
34	20-Continental Radisson Blu	4	Lisbon	8.3	22	8.6	36	8.5
	Sub-total Top 11 to 20			8.2	95	8.1	124	8.4
	Other Hotels Groups							
	PHC							
35	Hotel Mundial	4	Lisbon	8.4	50	8.3	82	8.1
36	Portugal Boutique	4	Lisbon	9.4	13	9.3	48	9.5
	Beautique							
37	Figueira Beautique	4	Lisbon	8.9	43	8.4	23	9.0
	Heritage							
38	Britania Boutique		Lisbon	9.5	17	9.3	0	
39	Lisboa Plaza	4	Lisbon	9.1	13	9.3	2	7.3
40	Heritage Av. Liberdade	5	Lisbon	9.2	6	8.6	1	9.6
41	As Janelas Verdes	4	Lisbon	9.2	3	9.7	1	10.0
42	Solar do Castelo	4	Lisbon	9.2	1	9.2	0	

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#	Hotel Name	Starts	Location	General Aver. Score	Analysis			
					Review Number Japanese	Aver. Score	Review Number Chinese	Aver. Score
	Sub-total Other Groups			9.1	146	9.0	157	8.9
	Independents							
43	Avenida Palace	5	Lisbon	9.2	41	8.8	8	8.7
44	Lisboa Carmo	4	Lisbon	9.2	25	8.6	17	9.0
45	Corpo Santo Lisbon	5	Lisbon	9.5	20	9.0	27	9.5
46	Hotel Santa Justa	4	Lisbon	9.3	20	8.4	17	9.2
	Sub-total Independents			9.3	106	8.7	69	9.1
	Total Sample Analysis			8.8	538	8.5	816	8.7
	Lisbon Metropolitan Area - Sample				1 068	8.6	1 919	8.6
	Sample Analysis				50.4%		42.5%	

*Source: www.booking.com, consulted from May 1st to June 30th, 2020
and updated from December 1st, 2020 and January 16th, 2021.*

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At the time of our analysis, the 152 luxury hotels operating in the Lisbon Metropolitan Area had 1.068 Japanese reviews and 1.919 Chinese reviews on Booking.com. Of these were selected 538 Japanese and 816 Chinese reviews in accordance with the following parameters: Hotels named among the top 10 hotels chains operating in Portugal (Deloitte, 2019), hotels with over 20 Japanese reviews in the Lisbon Metropolitan Area, and finally, to evaluate what could be attracting for the Japanese and not the Chinese, Luxury Hotels and Heritage Hotel Chain, include Britania boutique Hotel that had Japanese reviews and no Chinese reviews.

With regard to the Top 10 hospitality chains operating in Portugal (Deloitte, 2019), number one is Pestana Group, Pestana is a Portuguese Chain founded in Madeira, is represented by “Pousadas de Portugal”, Pestana Hotels and Resorts and Pestana CR7 (lifestyle hotels) and has an international presence (Brazil, UK, Mozambique and USA). The Vila Galé chain is second and has presence in Brazil as well as in Portugal. The French owned chain Accor is third and represented by Sofitel and Mercure Chain Hotels. At number 4 is the Minor Hotel Chain (Thai) and represented by Tivoli, NH and Avani Hotels, Hoti Hotels is fifth place, is a Portuguese group, operating only in Portugal and represented by Tryp and Melia international hotel chains. The Marriott (USA) at number 6, is represented by Sheraton and Marriott. Sana Hotels, at number 7 is part of the Azinor group which also has an international presence in Luanda (Angola) and Berlin (Germany). At number 8 a Portuguese Group, Vip Hotels. This group founded in Lisbon, launched its first hotel in Saldanha and has an international presence in Mozambique. The British Chain, InterContinental is number 9 and at number 10 DHM Discovery Management represented in Lisbon only by Ramada Hotel. In Portugal, there are three Hotels managed by Hilton: two in the Algarve (Hilton Vila Moura - Cascatas, and Conrad Algarve - Quinta do Lago), and the Double Tree by Hilton in Lisbon. The best classification of those three on booking.com (consulted on July 11th, 2020) was for the 5star hotel Conrad, which had 9.3 out of 10. The other two were rated below 9.0. The two hotels in the Algarve have no customer comments from the Japanese or Chinese. The one located in Lisbon - Double Tree by Hilton - has only two positive comments from Japanese clients and this concern the hotel design and polite employees, giving an average of 8.5. There are four comments from Chinese clients, giving an average of 6.5 with positive comments for location and breakfast and negative comments for soundproofing and cleanliness. Hilton is not in the top 10 in Portugal. Considering the sample of 46 hotels, they were analysed in accordance with the following Methodology, as Table 3.4.

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Table 3.4: Methodology approach summary (booking.com reviews)

Methodology type	Qualitative
Aim	To collect the positive and negative comments from Japanese and Chinese reviews on booking.com.
Approach	Grounded Theory and to complete and confirm the literature review outcome.
Sample Analysis	<p>Analysis of 46-, 5- and 4-stars hotels located in Lisbon Metropolitan Area (hotels over 10 km from Lisbon city centre registered few or zero Japanese hotels reviews, for this reason, they were excluded from the sample analysis), announced at booking.com: 152 out of a total of 166 located in the Lisbon Metropolitan area.</p> <p>30 hotels from the top 10 hotel chains in Atlas da Hotelaria (2019), representing more than 50% of total Lisbon's total Hotel's accommodation. Plus 7 other group/management hotels and 4 independent hotels with more than 20 Japanese reviews, and from Heritage Chain with more Japanese comments than Chinese comments.</p>
Data Collection	<p>NVivo and Manual. Every single review was content analysed and counted for all hotels considered in the hotel sample.</p> <p>The reviews were in Japanese and Chinese, automatic google translation to Portuguese on booking.com was used, and the content confirmed by translation into English, too. From a total of 1.354 reviews: 538 Japanese customers and 816 Chinese customers (reviews from 2018, January 1st to 2020, December 31st were analysed online from 2020, May 1st to June 30th. and up-dated from December, 1st, 2020 to January, 16th, 2021).</p>
Analysis	NVivo and Manual: Wording / Content analysis. Followed the open coding, axial coding and selecting coding steps.
Results	<p>We aimed to collect relevant information concerning hotel attributes (tangible and intangible) preferences of Japanese and Chinese hospitality customers, type of trip (business or leisure), travel type (couple, group, individual), average days stayed and room type preferences.</p> <p>Also, to get relevant information to make the questionnaire, interview guidelines and confirm literature outcome. Positive and negative key words were grouped into relevant hotel's attributes and classified according to the four dimensions of Balanced Scorecard strategy.</p>
Investigator Role	External and neutral analysis. No influence at all.

Source: Adapted from Daymon e Holloway (2002)

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Grounded theory is used because even if existing theory, it is potentially incomplete as the data used to derive that theory wasn't collected from the group of participants considered in this research.

The key words from both positive and negative reviews were collected manually and every comment was read. Also, an automatic text mining software was used (NVivo) and showed the positive and negative key words in a cloud. The reason for tackling this huge task manually was to get a "feel" for the full context around the negative and positive wording. Although it was very time consuming and tiring, with the additional risk of possible human error, what could be extracted in this way was deemed much more relevant. To analyse the information obtained, it was used the SPSS26.

Concerning to booking.com analysis and interviews to the hospitality management and experts it was used the following qualitative research steps (Open Coding, Axial Coding and Select Coding). Open Coding refers to the initial and line-by-line conceptualisation of data collected. Its purpose is to identify a problem and propose a possible solution by way of coding all the written data. This would often lead to many fragmented concepts and incidents, which need to be coded, compared, merged, modified, and re-named. Data are then turned into small, discrete components, with key words selected from the booking.com reviews. Each discrete piece of data is then coded with a descriptive label. Each word related to the same subject was labelled with the same code. Axial coding is used to find connections and relationships between codes, to thus establish a set of codes and identify connections between them. Causal conditions are sought, as well as the context behind observations, and the consequences of phenomena. Codes are aggregated and condensed into broader categories. The broader categories that make connections between codes are then determined. Selective coding is used to bring everything together in one overarching, core category that captures the essence of the research being selected and makes the connections between this overarching category and the rest of codes and data being identified. Booking.com Sample Reviews Analysis Workflow summarized at Figure 3.3.

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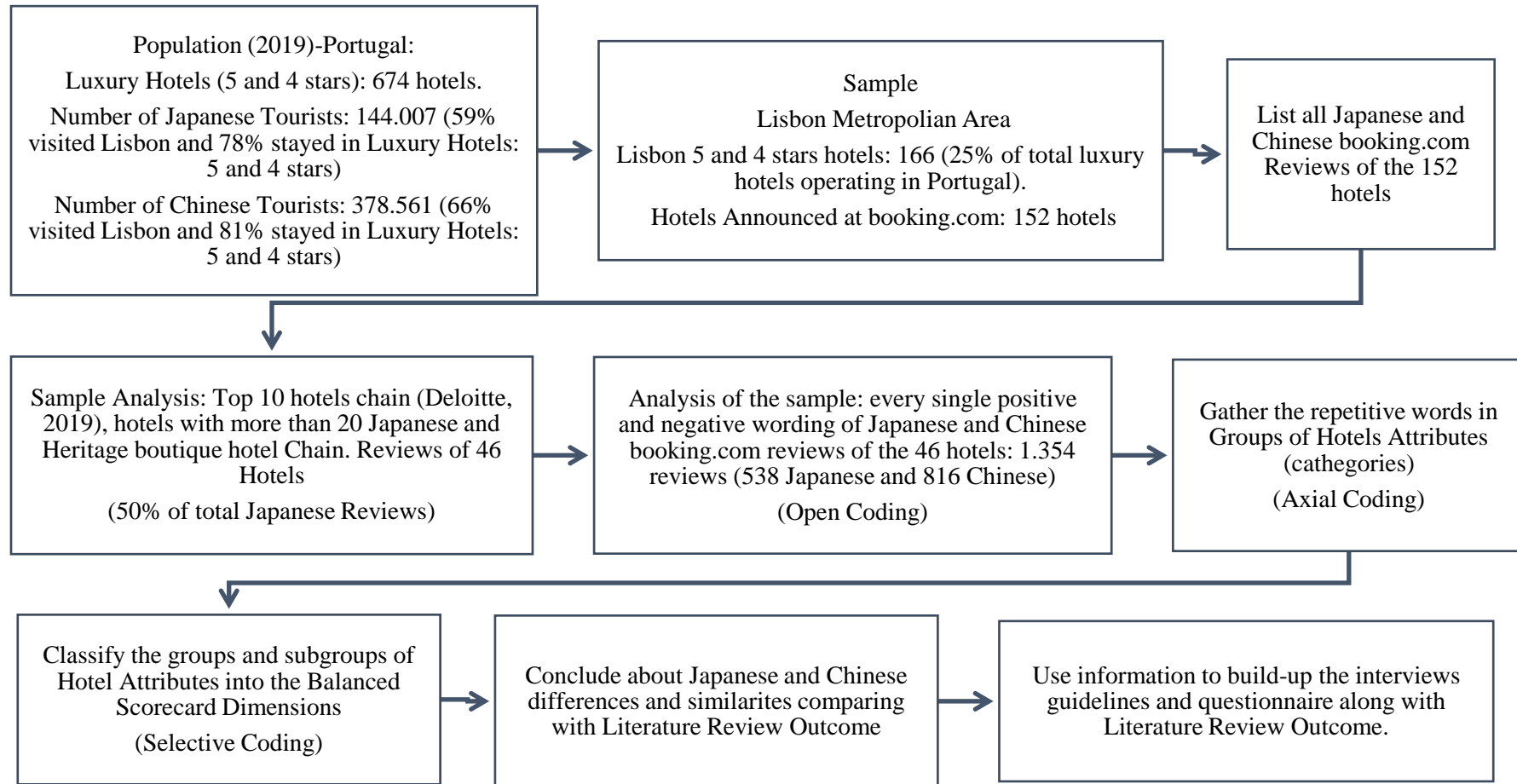


Figure 3.3: *Booking.com Sample Reviews Analysis Workflow*

3.4. Top Managers and Experts Interviews – Qualitative Research

In-depth Interviews

The qualitative research method is an especially effective and more flexible means of obtaining culturally specific information about the values, opinions, behaviours, and social contexts of specific populations. The aim was to collect evidence on and to understand what strategies luxury hotels have adopted to win over and retain Japanese tourists in Portugal. It was also to produce findings that were not determined in advance and that are applicable beyond the immediate boundaries of the study. A qualitative research method was applied, with Top Hotel Management and Hospitality Experts being interviewed.

Sample

The sample size used in qualitative research methods is often smaller than that used in quantitative research methods. This is because qualitative research methods are often concerned with garnering an in-depth understanding of a phenomenon or are focused on meaning (and heterogeneities in meaning)—which are often centred on the how and why of a particular issue, process, situation, subculture, scene or set of social interactions. As such, the aim of grounded theory and in-depth interviews is to create categories from the data and then to analyse relationships between categories, while attending to how the lived experience of research participants can be understood. (Charmaz and Belgrave, 1990; Charmaz, 2006, Dworkin, 2012).

With regard to how many interviews should be enough, an extremely large number of articles, chapters, and books give guidance and suggest that anywhere between 5 and 50 participants is adequate. (Dworkin, 2012). Numerous factors are said to be important, including the quality of data, the scope of the study, the nature of the topic, the amount of useful information obtained from each participant, the use of shadowed data, and the qualitative method and study designed used (Morse, 2000).

A questionnaire was used as an interview guide and responses given on a Likert 1 to 5 Scale (Likert, 1932) because that is easier for the responders to answer, and for the researchers to analyse their degree of agreement, gather the information, and compare it. Following guidelines determined by Mack et al. (2005), the participants were told: the purpose of the research; what is expected of a research participant, time likely to be required for participation; expected risks and benefits; the fact that participation is voluntary and that they can withdraw at any time with no negative repercussions; how confidentiality will be assured; and the name and contact

information of the local lead investigator who can be contacted to answer questions or deal with problems related to the research. At Table 3.5 the summary of interviews research method.

Table 3.5: Interviews Research summary

<p>Exploratory Few studies exist in Portugal concerning Japanese Market/Tourists Hospitality Management.</p>
<p>Analytical Literature reviews and analysis of booking.com reviews formed the basis of the interview’s guidelines. To determine the Portuguese luxury hospitality management strategy, concerning Japanese inbound tourism. Used the qualitative research analysis steps: Open Coding, Axel Coding and Selective Coding.</p>
<p>Problem Solving Conclude and advise about strategy improvement to achieve better management results concerning Japanese Inbound Tourism.</p>
<p>Qualitative, Intense, Inductive and Phenomenological In-depth interviews of hospitality managers and experts to collect opinions, perceptions, and expectations.</p>

3.5. Construction of the Questions

The question guidelines for the interviews and questionnaires were built on two main pillars:

- 1) Literature Review (reported in Chapter II).
- 2) Text analysis of booking.com reviews: Japanese and Chinese.

A summary of the steps followed is represented in Figure 3.4., below:

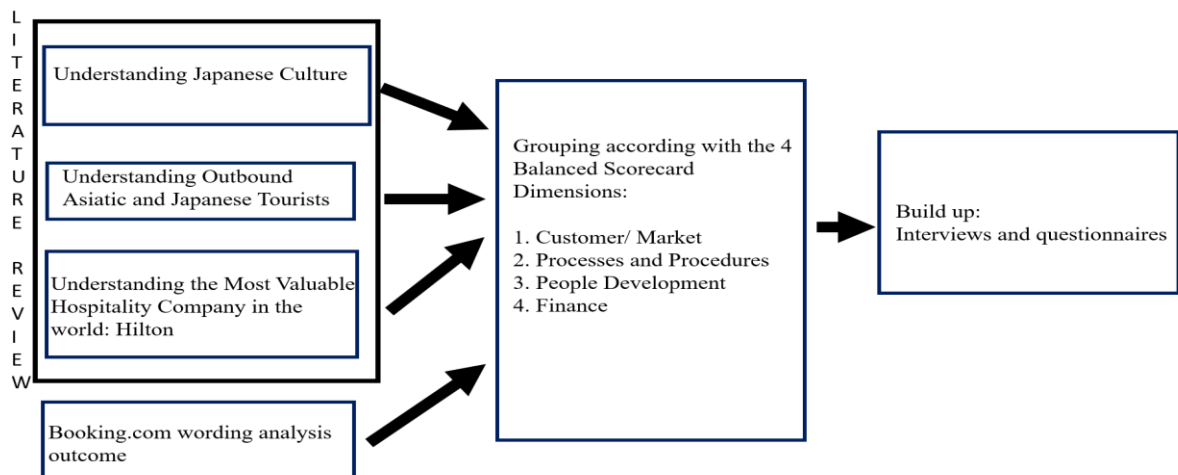


Figure 3.4: Process to construct interviews guidelines and questionnaire based in literature review outcome and booking.com wording analysis reviews.

Source: Own Elaboration

The Literature Review and content analysis of booking.com reviews formed the basis of interviews guidelines/questionnaire.

3.5.1. Sample Interviews (Hospitality Managers and Experts)

The Top Managers of hotels in the Top 10 Hotel Chains (Deloitte, 2019) and managers of Independent Hotels with relevant experience in the Hospitality sector (from the hotel sample in the analysis), as well as a Hospitality University Programs Coordinator were approached through LinkedIn. The purpose of the study was explained, and interview guidelines were sent. Those approached were then asked whether they could be available to join a phone conference, or a WhatsApp face to face meeting to discuss the matter in further detail. The most relevant top management of the Top 10 (Deloitte, 2019) were selected from the following hotels: One of the Lisbon hotels with the most Chinese reviews but no reviews by Japanese; One Lisbon 4-star hotel with the most Japanese reviews; one chain hotel which has a special program totally dedicated to the Asiatic market (Chinese), to understand why there is not a similar program dedicated to Japanese tourists; one of the biggest Portuguese chain hotel, this chain was chosen because its top manager has decades of experience in hospitality management and a Hospitality University Programs Coordinator.

Participants were assured there would be complete confidentiality, with no individual's name being shared, and that the full content of the interviews would not be transcribed since the subject was strategy. The interviewee profiles are presented in table 3.6.

Table 3.6: Interviewees' Profile

#	Hospitality Position	Gender	Chain	Interview Type	Years Hospitality Experience
1	Board of Administration	M	Top 10	Meeting	7+
2	Board of Administration	M	Top 10	Phone Conference	18+
3	CEO	M	Top 10	Phone Conference	31+
4	Director	F	Top 10	Phone Conference	23+
5	Hospitality Coordinator	F	University	What's app	2+

After that, the interview's wording content was coded (open coding), then the codes had been classified as categories (Axial Coding) and then classified according with the four

Balanced Scorecard dimensions: Customer and Market, Processes and Procedures, People Development and Finance (Selective Coding). Grounded Theory will be built.

3.5.2. Grounded Theory (GT)

Grounded Theory (GT) method is a widely used tool for qualitative research, aiming at constructing theories based on empirical data. As the researcher analyses data collected from various sources, elements (usually tagged with ‘codes’) are obtained. This procedure continues and those ‘codes’ are further processed into ‘concepts’ and ‘categories’, which eventually lead to construction of new theories. Unlike positivist analysis, GT begins with direct observation of original data and attempts to find concepts reflecting the truth behind observable phenomena. This method was devised by Barney Glaser and Anselm Strauss in 1965 (Glaser & Strauss, 1967). Charmaz (2014) argues that GT is especially suited for relatively new research areas, where generally agreed theories or definitions are still absent.

3.5.2.1. Questionnaire

The main objectives of the questionnaire are:

1) To test the respondents’ knowledge about Asian Market (Japanese and Chinese), evaluating the differences by sector (Automotive and Other Industries; Bank, Insurance and other Services; Education and Consultancy and Hospitality and Tourism), comparing with literature review and booking.com output: Questions n° 7, 8, 9.

2) To confirm interviews outputs relating to Portuguese Luxury Hotels Recruitment Policies and Portuguese Hospitality Schools: Questions n° 12.

3) To conclude about Strategy (before covid-19) concerning Asian markets (Japanese and Chinese) based in the four balanced scorecard dimensions (market, processes and procedures, people and finance), comparing if the thinking of hospitality strategy is the same for management with experience in hospitality or management with experience in other sector of activities: Questions n°6 (Market); n°10 (Processes and Procedures), n°11 and n° 13 (People) and n°14 (Finance).

4) To conclude about the Strategy (after covid-19), concerning market developments and balanced scorecard dimensions development priorities, comparing if the thinking of

hospitality strategy is the same for management with experience in hospitality or management with experience in other sector of activities. Questions n° 15,16,17 and 18.

The questionnaire (Appendix C) had been divided according with the four Balanced Scorecard Dimensions: Customer and Market; Processes and Procedures; People Development and Finance. The questions n° 1 to 5 are related to population sample characteristics: Sector of activity, Hotel Chain (if hospitality), Position, Sex and Age. From Part I to Part IV – Strategy before COVID-19 (questions n° 6 to 14), questions n° 6 to 9 (Part I) are related to Customer and Market (Asiatic Markets Approach, Japanese Tourist), the questions n° 7, 8 and 9 have only the purpose of understand how the cultural Japanese characteristics and differences related to Chinese are understood. Questions n° 10 (Part II) are related to Processes and Procedures. Questions n°11 to 13 (Part III) are related to people development (Front Office, Recruitment Policies, Training Policies). Questions n° 14 (Part IV) are related to Finance and Sustainability.

Question n° 15 to 18 (Part V) are related to strategy/expectations after COVID-19 (Q15-Profitability; Q16-Strategy priority; Q17-Improvement priority; Q18-Markets Development Priority).

The questionnaire was built taking in consideration the following outcomes: literature review, booking .com Japanese and Chinese reviews analysis and interviews.

A quantitative and deductive research approach was used and, as the subject is very specific, the respondents were selected according to the following criteria: those with experience in hospitality management or front office for the hospitality sector; and for other sectors, those with experience in management or professional experience working with Japanese and/or for Japanese companies. The questionnaires were sent out in Portuguese and used a Likert scale of 1 to 5 (1-Totally Disagree and 5-Totally Agree) ~ 6-Do not know 7-Do not want to answer ~were deliberately left out. “With a Five - point scale, it is quite simple for the interviewer to read out the complete list of scale descriptors (‘1 equals strongly disagree, two equals disagree ...’)”. Dawes, J. G. (2008). In total, 501 questionnaires were distributed. 141 questionnaires to hospitality managers and front-office staff, 51 to Japanese management in the Automotive and Other Industries, 45 to Hospitality Teachers involved in Education and Consultancy, and 264 questionnaires were sent to Top managers in other sectors of activity.

3.5.2.2. Pre-test and Optimisation of Item

To ensure validation, the questionnaire used during the interviews was previously tested and as a result of the feedback received, it was updated. The introduction was reduced (it had been too detailed, which made heavy going for the interviewers) to a brief explanation about the objective of the project and the terms of confidentiality, and to make it easier for participants, responses to some of the questions were changed from an evaluation on a scale of 1 to 5, to a simple: yes, no and do not know. However, given that the subject is not an easy or commonplace one, it was acknowledged that it would be difficult for respondents to generalise. The researchers also acknowledge that despite interviewees' experience welcoming Asian tourists or working with Japanese brands, it is nevertheless hard to understand Asian culture in general.

The questionnaires were analysed using IBM SPSS Statistics 26. Reliability (internal consistency) had been examined according to the Corrected ItemTotal Correlations (CITCs) of every item as well as Cronbach's alpha of every dimension and sub-dimension. The CITC reveals the item's internal consistency with other items, and Cronbach's alpha reflects the reliability of the scale. Items whose CITCs are below the 0.50 benchmark would be removed, and the recommended cut-off value for Cronbach's alpha is 0.70 (Hair, Black, Anderson & Tatham, 2006). However, although it is generally agreed upon that the Cronbach's alpha should exceed 0.70 (Nunnally, 1978; Turker, 2008; Smith, Karwan & Markland, 2009), Cortina (1993) argues that factors like number of items, number of dimensions, and average CITC should also be taken into account when determining the lower limit of Cronbach's alpha and suggests that values above 0.64 are all acceptable. Principal Component Analysis (PCA) had been used to extract principal components.

3.6. Statistical Methods

3.6.1. Descriptive Statistics and Hypothesis Tests

A descriptive statistical analysis was performed using IBM SPSS Statistics 26: measures of mean and standard deviation were calculated for each item. The mean and standard deviation scores of every item, every dimension, and every sub-dimension would then be calculated, compared, analysed, and discussed. One way ANOVA would be used to test the equality of population means for the four sectors of activity. Levene's test would be used to assess for homogeneity of population variances. When the null hypothesis of ANOVA is rejected, multiple comparison tests would be applied: Scheffé when population variances are equal and DunnettC test would be adopted in case of different population variances.

3.6.2. Exploratory Factor Analysis (EFA)

It was used the Principal Components Analysis (statistic instrument) to reduce the variables used by transforming a large set of variables into a smaller one that still contains most of the information in the large set.

To evaluate if the data is adequate for the application of principal components analysis, both the Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy and the Bartlett's test of sphericity (which tests the overall significance of all correlations in a matrix). The recommended cut-off for the KMO statistic is 0.70, (Cerny & Kaiser, 1977). The p-value of the Bartlett's test should be below 0.001 (Child, 1990).

3.6.3. Confirmatory Factor Analysis (CFA)

In multivariate statistics, the Confirmatory Factor Analysis (CFA) is employed to examine to what extent the measured variables correspond to the number of constructs assumed earlier by the researcher. In other words, it is used to confirm or reject the hypothesised measurement model (Tabachnick & Fidell, 2007). In order to verify the construct validity (including both convergent validity and discriminant validity) of the measurement instrument, CFA would be performed using IBM SPSS Amos 26.0. Convergent validity would be tested by examining the Standardised Factor Loading (SFL), Average Variance Extracted (AVE), and Composite Reliability (CR). If the results of the SFL and AVE were both greater than 0.70 and CR was above 0.60, then good convergent validity would be signified (Bagozzi & Yi, 1988; Fornell & Larcker, 1981).

Discriminant validity would be verified by comparing the square roots of the Average Variances Extracted (AVE) of every dimension with the absolute value of the corresponding correlation coefficients with other dimensions. Main diagonal of the correlation matrix should be higher than the absolute values of their correlation coefficients with other dimension, confirmed satisfactory discriminant validity.

3.6.4. Structural Equation Modelling (SEM)

SEM is a frequently used statistical tool to analyse the relationships between variables based on their covariance matrix, and it can determine whether a theoretical or conceptual model shows good fit. Compared to traditional methods of statistics, SEM can process not only the data measured but also the relationships between variables. Both the measurement indices and latent variables can be analysed simultaneously, and even the deviations of the variables can be measured. Moreover, SEM also reflects the application of the covariance matrix and the overall fitting degree of models (Raykov, 1997). For SEM, IBM SPSS Amos 26.0 was adopted. As multiple alternative models representing the CSR practices could be proposed, SEM was to be adopted to test and compare their overall fit with the purpose of determining the most appropriate model. The software program of IBM SPSS Amos 26.0 was to be utilised for this goal. Indices e.g. Chi-square, df, Chi-square / df, RMR, GFI, AGFI, TLI, CFI, and RMSEA are generally considered to be reflective of the model's goodness of fit and are widely in use (Raykov & Marcoulides, 2006). Popular criteria are listed in Table 3.7. If the proposed theoretical model showed satisfactory results for most of them, the model could be deemed to have good fit.

Table 3.7: Overall Fit of Proposed Model

Statistics	Fit Indices
χ^2 / gl	<p>>5 – Bad Adjustment</p> <p>]2;5] – Acceptable Adjustment</p> <p>]1;2] – Good Adjustment</p> <p>~ 1 – Very Good Adjustment</p>
CFI	<p>< 0,8 – Bad Adjustment</p> <p>[0,8;0,9[– Tolerable Adjustment</p> <p>[0,9;0,95[– Good Adjustment</p> <p>>=0,95 – Very Good Adjustment</p>
PCFI	<p>< 0,6 – Bad Adjustment</p> <p>[0,6;0,8[– Good Adjustment</p> <p>>=0,8 – Very Good Adjustment</p>
RMSEA	<p>>0,8-0,10 – Bad Adjustment</p> <p>]0,05;0,08]–Acceptable Adjustment</p> <p><= 0,05 – Very Good Adjustment</p>

Note: gl=degrees of freedom

Source : Adapted from Marôco (2021) pag.55

3.6.5. Crossover Study

In order to determine whether there were any statistically significant differences between groups Variables (Sector, Age and Sex), a one-way analysis of variance (ANOVA) would be performed using IBM SPSS Statistics 26.0. The one-way ANOVA is a tool to establish whether statistically significant differences exist between the means of three or more independent population groups. If the p-value associated to the test value is greater than 0.05, it indicates the hypothesis of no statistically significant differences between population groups means should not be rejected. However, if the p-value is less or equal to 0.05, then it should be concluded that at least two population means are different. One way ANOVA assumes that the samples are drawn from normal distributed populations with equal variances. Levene's test would be used to assess for homogeneity of population variances and when sample size of any group is not above 30, a Shapiro-Wilk Test of Normality would also be carried out. This type of test is more appropriate for relatively small sample sizes compared to the Kolmogorov Smirnov Test. When

the null hypothesis of ANOVA is rejected, multiple comparison tests would be applied: Scheffé when population variances are equal and DunnettC test would be adopted in case of different population variances.

3.7. Methodology Summary

The research begins with six exploratory interviews to one member of direction of Portuguese Tourism Office, one board of administration of a Portuguese hotel chain and four Japanese to evaluate the relevance of the research concerning Portuguese inbound Japanese tourists. From this first beginning it was understood that Asian are seen mainly as Chinese, for that reason Chinese tourists had been introduced in the analysis to compare with Japanese. From an extensive literature review to explore the hospitality attributes and strategy concerning Asian Markets, it was found out the importance of Balanced Scorecard in the strategy of the most valuable hospitality company in the world (Hilton) and the most valuable Japanese company in the world (Toyota) and the hotels attributes most appreciated by these tourists (Japanese and Chinese).

Analysis of Reviews at booking.com helped to understand the hotels attributes most appreciated by Japanese and Chinese staying in luxury hotels in Portugal. Literature reviews and booking.com reviews analysis were the basis of interviews to Hospitality Managers and Experts and all of them the basis of questionnaire to hospitality managers (including front-office) and other managers in other sectors of activity (thinking out of the box). Booking.com and interviews outcome had been analysed using the open, axial and select coding and for the questionnaires a principal component analysis at SPSS and AMOS to evaluate the model fit had been used. Figure 3.5. illustrates the research path summary and it is located in the end of this Chapter.

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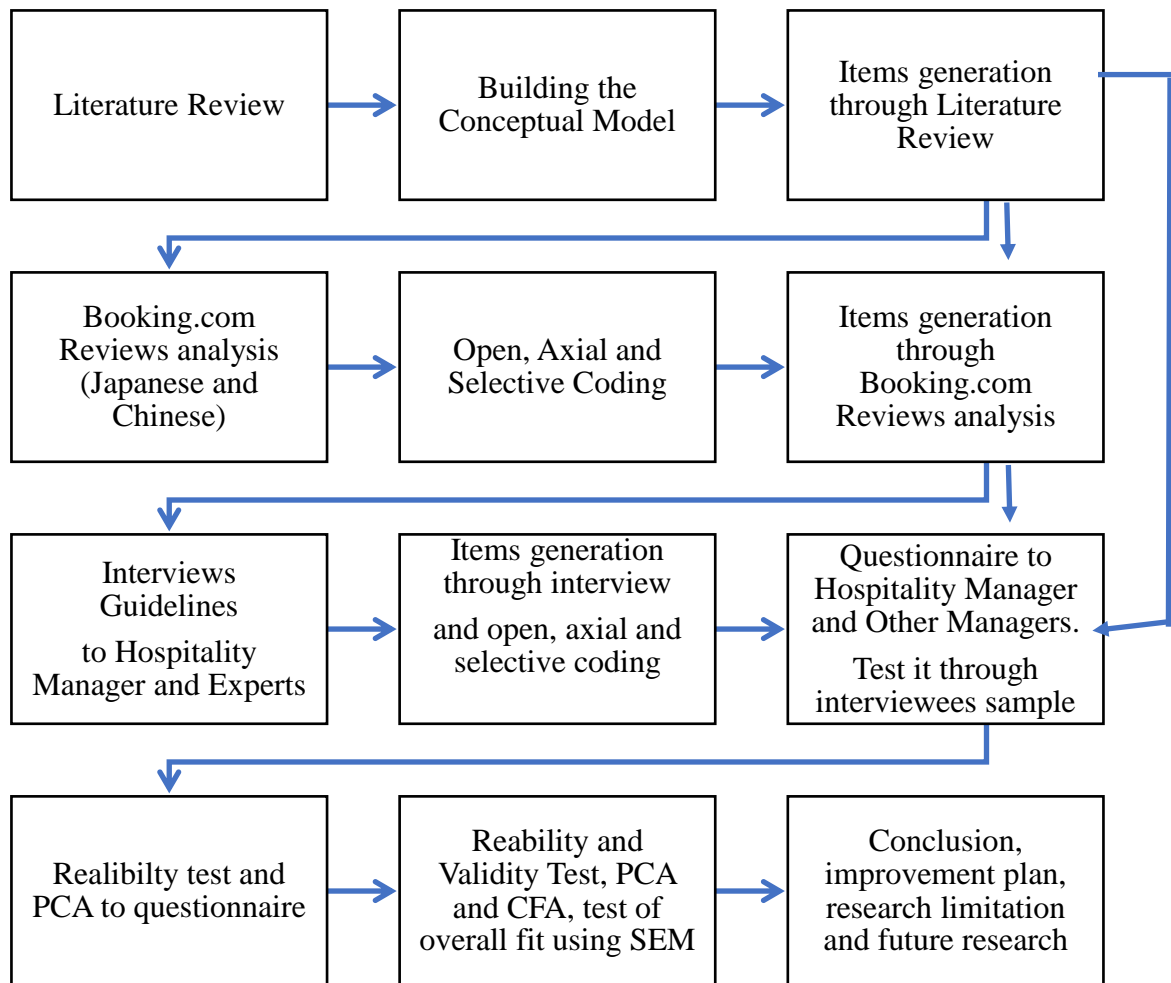


Figure 3.5: Methodology Summary

Source: Own Elaboration

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Chapter 4. Results and Analysis

This Chapter provides the basis for the study’s conclusions and the connection between the analysis of the hotel sample and the (Japanese and Chinese) tourists’ profile and preferred hotel attributes.

The hotels in the sample, totalling 46 hotels, were analysed using three data sources:

- 1) Japanese and Chinese customer reviews and profiles on Booking.com. Looking at both Positive and Negative comments to understand what these customers consider the most important luxury hotel attributes (detailed in 4.1.)
- 2) Interviews of Luxury Hotel Top Hospitality Managers and Experts to understand their pre and post Covid-19 strategy concerning Asian markets in general, and the Japanese compared specifically to the Chinese (detailed in 4.2.)
- 3) A Survey (by questionnaire) of Hospitality Managers (including Front-Office positions) and Managers of other sectors of activity with the aim of gathering an outside the box perspective about luxury hotels’ pre and post Covid-19 strategy for the Asian markets in general, and the Japanese compared specifically to the Chinese (detailed in 4.3.)

4.1. Booking.com: Japanese and Chinese Reviews

4.1.1. Descriptive

The characteristics of the Asian travellers (538 Japanese and 816 Chinese) staying at 46 Hotels, are as follows:

Table 4.1: *Trip Type*

	Frequency Japanese	Percent Japanese	Frequency Chinese	Percent Chinese
Business	82	15.2	132	1.2
Leisure	414	77.0	635	77.8
No info	42	7.8	49	6.0
Total	538	100.0	816	100.0

In the case of Japanese and Chinese customers, 78% and 77% were travelling for leisure, with only 15% and 16% of trips related to business. The percentage of Chinese travelling for business is marginally higher than for the Japanese.

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Both, the Japanese and Chinese prefer to travel with others, either in a Couple, as a Family or in a Group, representing 74% and 87% of the total respectively. Somewhat surprisingly, the percentage of Japanese travelling alone is higher than for the Chinese, representing 26% of total. The Chinese in the sample prefer to travel as a group much more than the Japanese do. As shown in table 4.2, at almost 60%, travelling as a family (or in a couple) is the first preference among the Japanese. Almost 50% of both the Japanese and Chinese chose the Double/Twin room type:

Table 4.2: Travel Type

	Frequency Japanese	Percent Japanese	Frequency Chinese	Percent Chinese
Couple	169	31.4	223	27.3
Family	152	28.3	257	31.5
Group	79	14.7	227	27.8
Individual	138	25.6	109	13.4
Total	538	100.0	816	100.0

More than 90% of Japanese and Chinese stayed 4 nights or fewer. More than 30% stayed only one night in one of Lisbon’s Luxury Hotels in the sample (46 hotels). However, on average, the Japanese stayed 2.55 nights and the Chinese stayed 2.37 nights in one of Lisbon’s Luxury Hotels, as shown in Table 4.3.

Table 4.3: Number of Overnight Stays

Customer	Mean	Standard Deviation
Japanese	2.55	1.526
Chinese	2.37	1.479

Booking.com presents the customer reviews with a rating from 1 to 10: 1 is bad and 10 wonderful, below 6 is not satisfactory, 6 to 6.9 = pleasant, 7 to 7.9 = good, 8 to 8.9 = very good, 9 to 10 = wonderful.

On average, the Japanese scored the luxury hotels lower than the Chinese did, with 5-star hotels being rated higher than 4-star hotels, by both Japanese and Chinese customers. For both,

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however, reviews for 4-star hotels represent over 70% of the 46 hotels in the sample, as shown in table 4.4.

Table 4.4: *Number and Score of Japanese and Chinese reviews per hotel star rating*

	Hotel Stars	Valid				
		N	Percent	Mean	Maximum	Minimum
Japanese	4	400	74.0%	8.3	10.0	3.0
	5	138	26.0%	8.5	10.0	3.0
Total		538	100.0%			
Chinese	4	646	79.0%	8.4	10.0	1.0
	5	170	21.0%	8.7	10.0	3.3
Total		816	100.0%			

4.1.2. Wording Collection and Grouping by Hotel Attributes

For the word content analysis of the booking.com reviews, the following were used: Open Coding, Axial Coding and Selective Coding. These are all used in the grounded theory method to analyse qualitative data.

1.354 comments made in online reviews on booking.com were analysed: 538 from Japanese hotel customers and 816 from Chinese hotel customers who stayed in one of the 46 hotels in the sample (4- and 5-star hotels operating in Lisbon). Of the 46 hotels in the sample, 34 are chain hotels (30 hotels in Top 10 of Deloitte study in 2019), and 12 are boutique hotels operated by small hotel chains or independents.

Each Japanese and Chinese booking.com review was fully content analysed. First, words repeated in the Japanese and Chinese comments on booking.com were collected and classified in the Open Coding Dimensions as shown in Table 4.5. Second, the Open Coding dimensions with similar characteristics were gathered in six groups (Axial Coding): 1. Location, 2. Facilities, 3. Room (Bedroom, Bathroom and Room), 4. Breakfast, 5. Staff/Service, 6. Price, as shown in Figure 4.1. Third, some connections between these categories that capture the sense of the study were found (Select Coding) grouped in the balanced scorecard dimensions: Features, Processes and Procedures, People and Finance as demonstrated in Figure 4.2.

The Flow Chart of Open Coding, axial coding and Select Coding analyses are as summarised in Figure 4.3.

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Table 4.5: Open Coding and Axial Coding

Select booking.com Reviews Wording					
Japanese		Chinese		Open Code Dimensions	Axial Code Dimensions
<i>Positive Words</i>	<i>Negative Words</i>	<i>Positive Words</i>	<i>Negative Words</i>		
Sea	Must climb	Environment	No supermarkets	General	Location
Tourist area/Attractions	Far from touristic points	Belém	Far from centre	Transport	
Transport (Station, Metro, Bus)	No restaurants	Transports (Station, Metro, Bus)	Far from restaurants	Shops, Restaurants, Supermarket	
Near Conference	No supermarkets	Station (even from Madrid)	Far from supermarkets	Tourist Attractions	
Restaurants		Near Convention		Conference	
Supermarkets		Shops (Av. Liberdade)		Quite	
Security/Safety		Convenient to drive in		Safe	
Convenient		Main walking street			
Shopping		Quiet environment			
Transport to airport		River View			
Walking distance		Healthy conditions			
		Convenient			
		Safe			
		Good for business			

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Select booking.com Reviews Wording					
Japanese		Chinese		Open Code Dimensions	Axial Code Dimensions
<i>Positive Words</i>	<i>Negative Words</i>	<i>Positive Words</i>	<i>Negative Words</i>		
Luxury	Bad Elevator	Ancient style preserved	Old Facilities	General View Elevator, Hardware, Software Design, Decoration, Building Cleaning Hotel Restaurant, bar, Lounge Lobby Free Drinks Swimming-pool Gym, Spa Parking	Facilities
Swimming-pool	Bad Hardware	Modern	Outdated		
Facilities	Bad Software/Wi-Fi	Impressive (Cristiano-CR7)	Few Cristiano Items		
View	No View	Equipment (Hardware)	Few elevators		
Spacious Hotel Restaurant	Noisy Restaurant	Internet (Software)	Small swimming pool		
Comfortable Hotel	Old Facilities	Easy to park	Little entertainment		
Restaurant		Spacious Hotel Restaurant	Old equipment		
Sky bar		Environment Hotel	Parking hard to manage		
Sauna free of charge		Restaurant	Parking inconvenient		
Gym		Lunch good and healthy	Hygiene (cockroach).		
Spa		Chocolate	Wi-Fi		
Light meals in lounge		New	Noisy Bar		
“Peace of mind”		DJ	No Gym		
Renovated		Clean Interior	Small elevator		
		Free Postcards			

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Select booking.com Reviews Wording					
Japanese		Chinese		Open Code Dimensions	Axial Code Dimensions
<i>Positive Words</i>	<i>Negative Words</i>	<i>Positive Words</i>	<i>Negative Words</i>		
Window Large Clean Comfortable Fridge Relax Calm Kettle Mini bar free drinks Bright	Dirty Dusty No big windows Air conditioning broken No mineral water No “Nespresso” machine Not enough plug sockets No amenities Room phone not connected Low temperature bath water TV control not working well No Kettle No soundproofing No fridge	Phones Available Nice Comfortable Large/Spacious Ventilated Good temperature Clean View Beautiful Kettle Modern lighting Mini bar free drinks	Small Lights Old windows (cannot open) Switch was not working well No soundproofing A/C cannot be switch off No additional blanket Smell Noisy Noisy A/C Outdated No coffee and tea No slippers No tooth brush No tissue No Kettle No removable hangers Plastic mouth wash cup	Cleaning Comfort Size Relax, Calm, quite Kettle, Fridge Design, Bright Free drinks, food Amenities Soundproofing Equipment working Equipment use	Bedroom
Comfortable	No Comfort Bad clothes	Comfortable Mattress (soft, comfortable) Comfortable clothes	Average Uncomfortable Pillows	Comfort Mattress Clothes	Bed

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Select booking.com Reviews Wording					
Japanese		Chinese		Open Code Dimensions	Axial Code Dimensions
<i>Positive Words</i>	<i>Negative Words</i>	<i>Positive Words</i>	<i>Negative Words</i>		
Hot water	No bathtub No hot water No privacy (glass) Door with gap Shower not working properly Towel quality Difficult to use Bath tap Water leakage Bathtub location (middle room) Bathroom design Difficult to open Bathroom door Low temperature bath water Didn't know how to use	Bathtub Electric curtains	Narrow bath door Weak shower water Toilet overflow Bathtub water No toothpaste, brush Drainage Bath Drainage Sink Water	Design Size Cleaning Bathtub Hot Water Water Flow Towels Equipment working Equipment use	Bathroom
Delicious Diverse Substantial Good but lack of vegetables In the room Fast no waiting Available from 4 a.m. Few people – relaxing	Lack of vegetables Lack of staff serving Lack of variety Cleaning Crowded	Acceptable Delicious Diverse Chinese food Rich Available from 4 a.m.	Bugs on fruit plate Repetitive Not good	General, Tasty Diverse Vegetables Availability Cleaning Calm	Breakfast

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Select booking.com Reviews Wording					
Japanese		Chinese		Open Code Dimensions	Axial Code Dimensions
<i>Positive Words</i>	<i>Negative Words</i>	<i>Positive Words</i>	<i>Negative Words</i>		
Quick response	Lack of respect (Knock at 10 a.m.- clean)	Helpful (keep items)	Unkind	Nice, Kind, Friendly	Staff/Service
Kind	Could n´t find good restaurants	Nice	Check-in delay	Helpful, Pro-Active	
Satisfied	No staff to fix shower problem	Patient	No ability to do things	Enthusiastic, Smiling	
Helpful	Rude at Breakfast	Active	Slow front office	Attitude	
Keep baggage free of charge	Fixed timetable (Transport to airport)	Enthusiastic	Bad Service	Front-office	
Call taxi – check-out	Few employees (check- in)	Excuse check-in delay (cup on bar)	No help with baggage	General	
Good Front-office	Difficulty to find room number	Recovered forgotten camera	Not 4 star standard		
Friendly	No planning in advance	Arrogant	Not 5 star standard		
Educated	Slow response	Excellent Front Office	Not professional		
Humble		Kind (help baggage)	Not Patient		
Nice		Good Attitude	Bad Attitude		
Information (walk to interesting places)		Fulfil customer´s needs	Slow check-in / check- out		
Simple		Attitude	No smiling faces		
Rational		Front office	City not advanced		
Supportive		Chocolate	Lack of communication		
Welcome drink		Attentive			
Up-grade					
Communication among the staff					
Staff Recommendation					

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Select booking.com Reviews Wording					
Japanese		Chinese		Open Code Dimensions	Axial Code Dimensions
<i>Positive Words</i>	<i>Negative Words</i>	<i>Positive Words</i>	<i>Negative Words</i>		
Value for money Price	Paid additional fee Price	Price Value for money Discounts	Not 4 star standard High Double Payment Payment/Invoicing doubts Wrong invoicing	Price Value for Money Additional payment Payment/invoicing	Price

Source: Booking.com reviews – word frequency analysis from www.booking.com between May 1st and June 30th, 2020, and updated from December 1st, 2020 and January 16th, 2021 summary self-made by the author.

The repeated words were collected and classified as a code (open coding), these codes were then classified in categories (axial code) as six main Hotel Attributes (Tangible and Intangible) : 1. Location; 2. Facilities; 3. Room (Bedroom, Bed and Bathroom); 4. Breakfast; 5. Staff / Service; 6. Price, as Figure 4.1., in line with similar attributes used in other studies of online review analysis such as that of Liu et al. (2017), Berezina et al. (2015), Zhang et al. (2015) and Magnini (2011).

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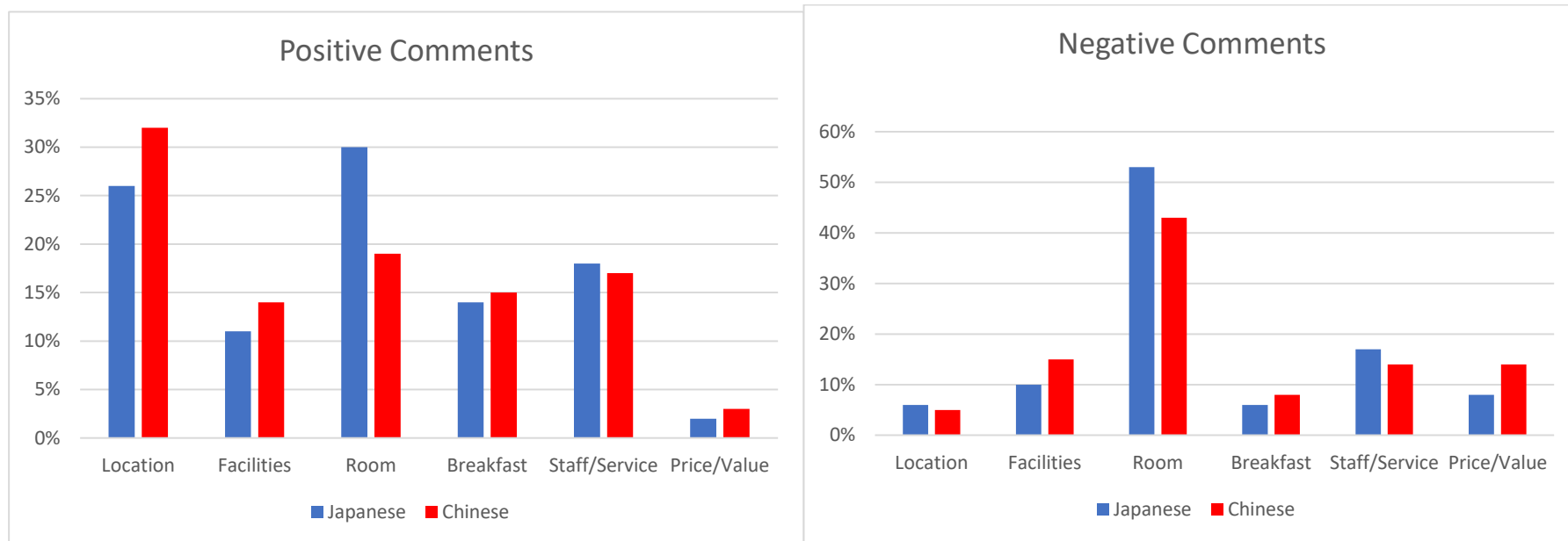


Figure 4.1: *Japanese and Chinese Hotel Comments Compared by Hotel Attribute*

*Source: Made by the author, based on booking.com
Reviews outcome analysis of 46 hotels (sample).*

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The categories above in Figure 4.1. were then grouped in the four balanced scorecard categories (selective coding): Market and Customer, People, Processes and Procedures and Finance, as follows in Figure 4.2.

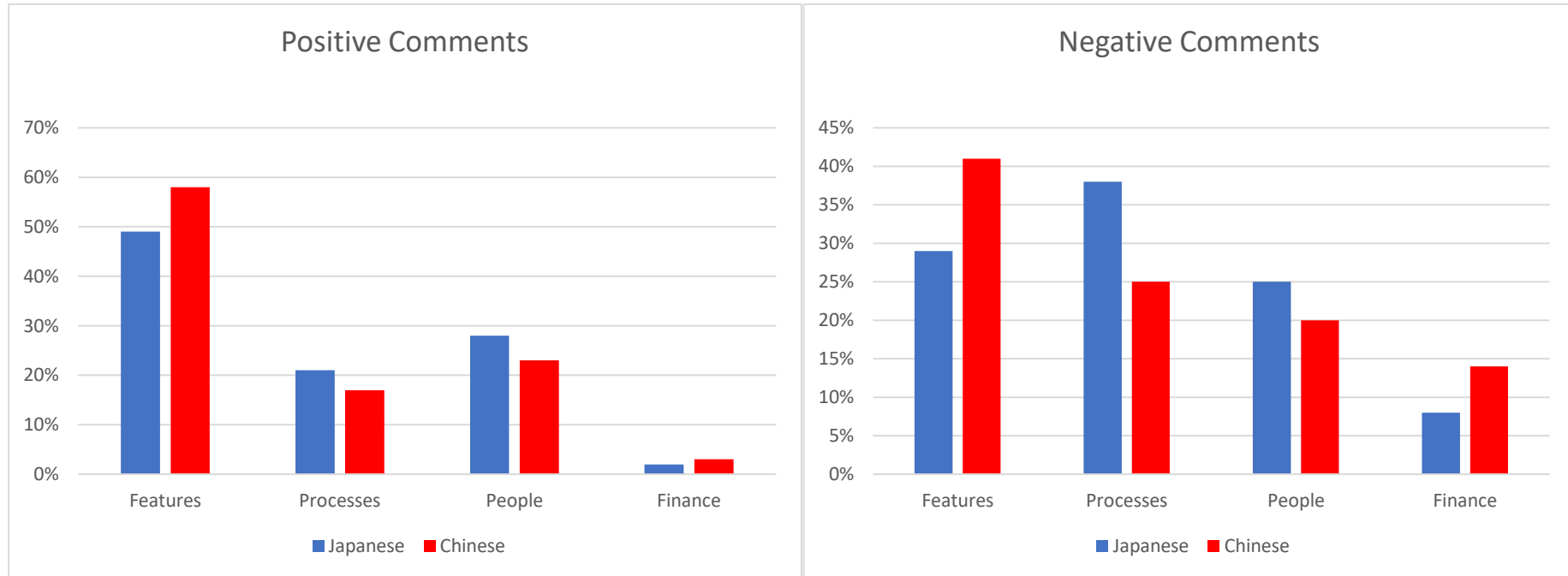


Figure 4.2: Japanese and Chinese Hotel Comments Compared by Balanced Scorecard Dimensions

Source: Made by the author, based on booking.com reviews outcome analysis of 46 hotels (sample).

A summary of the process analysis is presented in Figure 4.3, below.

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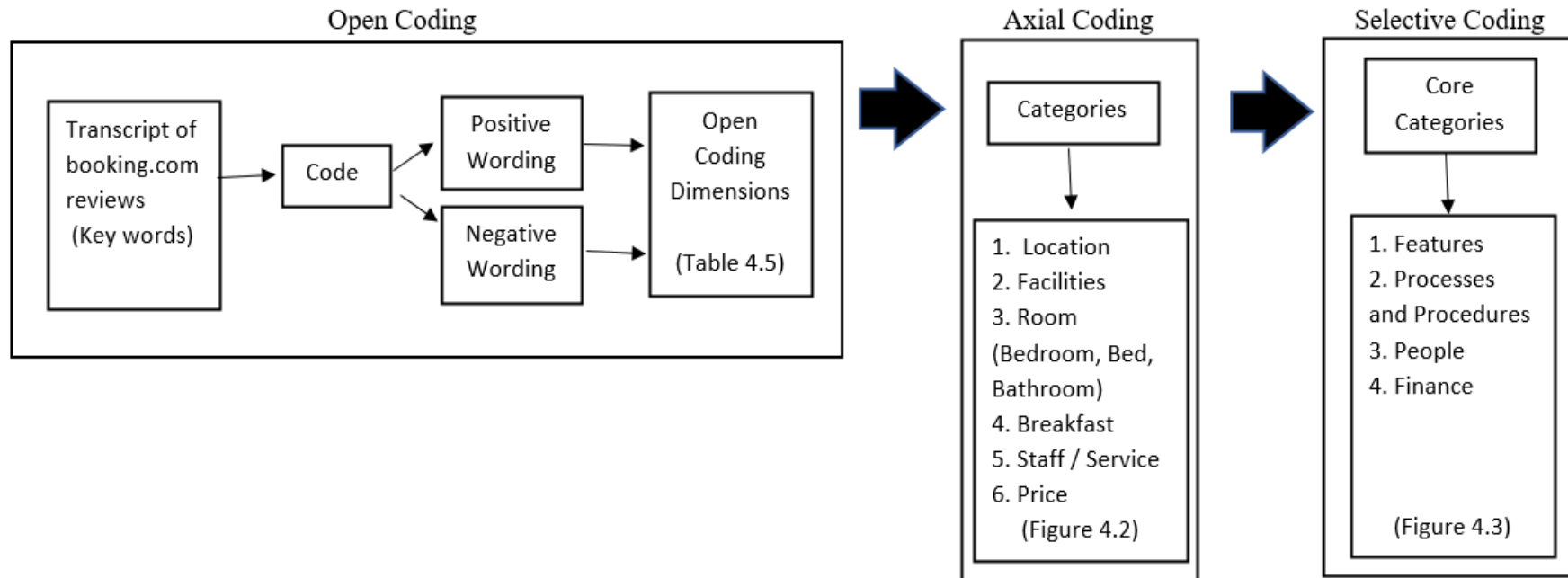


Figure 4.3: Flow Chart booking.com reviews content analysis

Source: Own Elaboration

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While the Chinese consider location, room features, facilities, price, or value for money more important than the Japanese do, the Japanese are more concerned about service items, clear processes, the efficiency of room equipment and its ease of use, whether there is a bathtub, hot water, and bathroom privacy. In short, the Japanese focus more on service than the Chinese do and, in line with what Liu et al. (2017) found, the Chinese focus is on room and facility features. In research conducted by Magnini et al. (2011), eleven determinants of customer delight were reported: Customer service, Cleanliness, Location of the hotel, Value, Facilities (other than in the hotel room itself), Size and Décor of the hotel room, Renovation/Newness, Food, Amenities and Quietness of the hotel. With Peace-of-mind having been shown to strongly influence customer satisfaction and to significantly impact loyalty and word-of-mouth recommendation, providing hotel customers a pleasurable experience would appear to be of paramount importance for the organization (Ko,2020). Hotel guests' comments on sleep quality did not differ between business and leisure travellers, and was inversely associated with "uncomfortable bed linen," "uncomfortable pillows," and "sound from the air conditioning unit or heater." Sleep satisfaction was a strong predictor of overall hotel satisfaction (Robbins et al., 2021). Comments on booking.com about "rude staff behaviour" and the importance of taking the needs of older people into consideration such as, provision of a kettle to boil water in the hotel room are in line with Asian culture and the core virtue of Confucianism - filial piety - which leads to respect for the elderly. Young people in Asia are raised to respect the elderly. Scholars stress politeness as a critical dimension when Westerner's deal with the Japanese (Reisinger & Turner, 1999; Ziff-Levine,1990), and have pointed out two major Japanese cultural attributes: one is a behavioural characteristic referred to as "polite inexplicitness," and the other is trust. To promise a service and not fulfil this promise is a big trust issue for the Japanese.

In comparison with the Chinese, the Japanese give more importance to a helpful employee attitude (apology for lacks or failure), cleanliness, the existence of bathtub, clear instructions on how to work equipment in the room.

The Chinese are more concerned with decor (they like modernity, with dated decor being considered negative and, in some cases, even if in historic areas and renovated). The following comments are an example of the previous differences.

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A Japanese tourist's comment about Hotel Avenida Palace:

“It is a hotel that makes you want to come again. A wonderful hotel with a historical feel. The equipment is old, but well maintained and I could use it. The interior is beautiful, and La Belle Epoch style salon on the first floor where you ate afternoon tea is attractive. The breakfast restaurant is also beautiful. The staff were very friendly, and I was able to stay comfortably in general” (Review rating 9.2, made in March 2019).

A Chinese tourist's comment about the same hotel, Hotel Avenida Palace:

“Old setting needs refurbishment and remodelling of room features” (Review rating of 5.4, made in May 2019).

The Chinese also like smiling and enthusiastic employees (as this means, they are doing their job with happiness and joy) and give more importance to price/value for money. This is in line with the findings of Mohsin and Lockyer (2010), where the most important hotel attributes are the first contact with the hotel staff (front-office), helpful, friendly staff, room furnishings and value for money. Hospitality complaints mainly appear in the following categories: “rooms”, “arrogant and/or clueless staff” and “failure to respond” (Ekiz et al., 2012). Room (such as room size), cleanliness, location (such as close to attractions and accessibility to public transport) and value (such as room price) are reasons for customer dissatisfaction with luxury 4- and 5-star hotels (Zhou et al., 2014, Li et al., 2020). Hotel frontline employees play a key role in customer satisfaction and prompt customers to write positive online reviews. With regard to the two major categories of consumer complaints: room improvement and hotel staff attitudes, (Berezina, 2015), the Japanese focus more on service and the Chinese focus more on room features (Liu et al., 2017).

4.1.3. Chain Hotels Versus Boutique and Independent Hotels

In our study, the Japanese and Chinese rated Boutique, and independent hotels higher than “traditional” chain hotels and used more words in their comments on booking.com. For this reason, it is important to understand the differences between a “traditional” chain hotel and a boutique/independent hotel.

A chain hotel is a hotel that is part of a group of hotels under the brand of a hotel group—an administration company that manages several hotels in different locations but using the same name or brand. The definition of “chain-affiliated” hotels includes both wholly owned subsidiaries and franchises. The opposite of the chain hotels are independent hotels, which operate independently (O’Neill & Carlbäck, 2011; Xu, 2018). In our sample, even though there

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are only 12 independent hotels out of 46, they represent 46% of the number of Japanese Reviews, confirming the research conducted by Xu (2018) and Botti et.al (2009) that found customers are motivated to describe the core attributes of products and services of independent/chain hotels in online textual reviews in more detail to help future customers make purchase decisions.

The hotel industry can be characterized by the dichotomy between chain and independent hotels. The main difference between chain and independent hotels is the organizational relationship of hotels; chain hotels are affiliated with other hotels under common ownership, whereas independent hotels have independent operations (Ottenbacher, 2007; Xu, 2018). The average score for the independent hotels is higher than for the chain hotels, and the Japanese customers' preference for Independent Hotels may be due to there being many more reviews giving greater detail for the Independent Hotels. This confirms the findings of Xu (2018), that customers are motivated to describe the core attributes of products and services of independent/chain hotels in online textual reviews in more detail to help future customers make purchase decisions. This, in turn, is confirmed in our study by the high number of positive and negative comments of Japanese customers for Independent Hotels compared to Chain Hotels. The review ratings are higher for independent and boutique hotels than for Chain Hotels, as detailed in Table 4.6.

Table 4.6: *Rating Difference between International Hotel Chains and Independent/Boutique Hotels*

Reviews and Score	Japanese		Chinese	
N° Reviews (Total)	538		816	
<i>Average Score (46 hotels)</i>	8.5		8.7	
N° Reviews (Top 10 chain-30 hotels)	191	36%	466	57%
<i>Average Score (Top 10 chain-30 hotels)</i>	8.2		8.3	
N° Reviews (Other chain-4-star hotels)	95	17%	124	15%
<i>Average Score (Other chain-4-star hotels)</i>	8.1		8.4	
N° Reviews (Independent&Boutique-12 hotels)	252	47%	226	28%
<i>Average Score (Independent&Boutique-12 hotels)</i>	8.9		9.0	

Source: Own Elaboration

Not only are there more reviews for Independent Hotels, but the average ratings awarded by both groups of travellers are higher than for Chain Hotels. For O'Neill & Carlback, 2011, chain and independent hotels have different operating efficiencies. Compared with independent hotels, chain hotels perform better with regard to certain attributes, such as employee training

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and technology application (Yeung & Law, 2004). The standard of products and services of independent hotels are more varied than those of chain hotels (Haktanir & Harris, 2005).

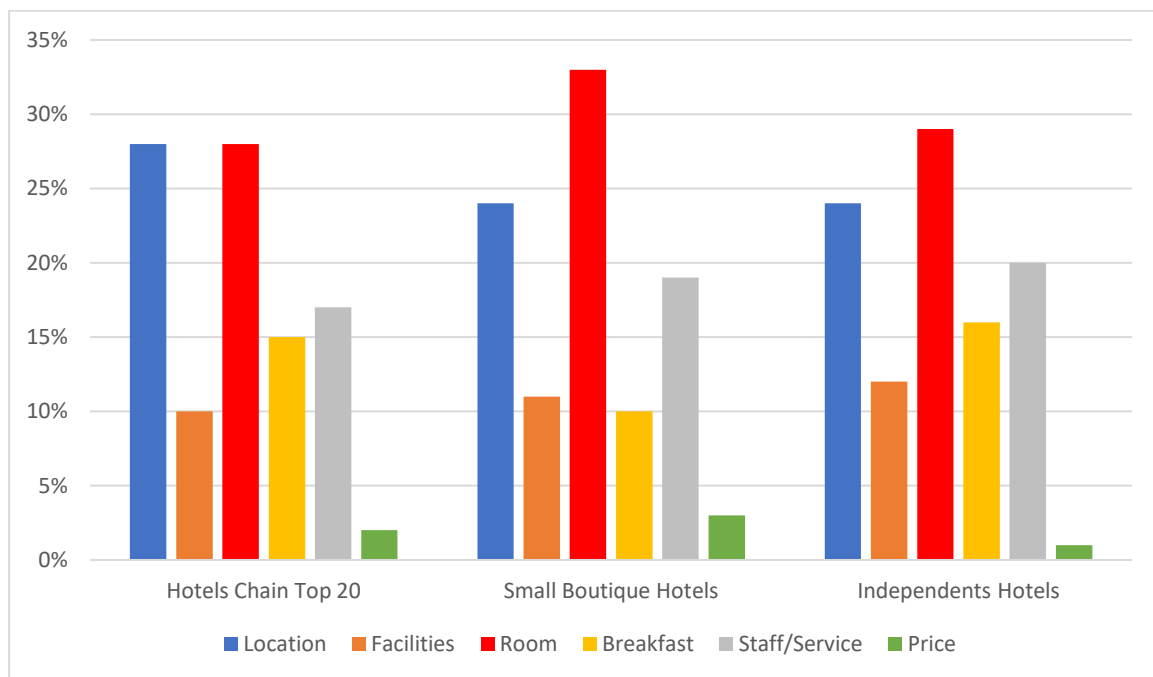


Figure 4.4. – *Positive Japanese Reviews by Hotels Type*

Source: Own Elaboration

Room and service are indicated as being better in the small boutique chain and independent hotels than in the traditional international hotel chains. Small boutique hotel chains also received positive comments on value for money, which could explain the higher rating they received from Japanese tourists. Boutique hotels are typically small hotels that offer high levels of service. Boutique hotels tend to be stylish, trendy, and “cool” and provide an intimate hotel experience. Boutique hotels often provide authentic cultural or historic experiences and interesting services to guests. Boutique hotels are unique. Lifestyle hotels tend to be small- to medium-sized hotels that provide innovative features and service, with a highly personalized service that distinguishes them from larger hotel brands (Jones et al., 2013). This is confirmed in our analysis by several Japanese comments about the style and historical facilities of boutique hotels, which contrastingly in some cases, the Chinese considered old or outdated. Specifically, the Britania Boutique Hotel (Heritage) with 17 comments from Japanese and none from Chinese recorded an average booking.com of 9.3 with positive comments as “Educated and Kind Staff”, “Room with Bathtub”, “Wine Service in the room”, “Security”, “Location”, “Room Temperature”, “Helpful Staff (recommended restaurant)”, “Relaxing and Diverse

Breakfast”, “Perfect Hotel”. Negative comments are mainly related to “Fridge and Hair Dryer not working well”.

As reported in Tsang and Ap (2007), Asians preferred the basic and practical aspects of the service, giving high ratings for variables such as, “staff understanding one’s problems and needs”, “dependable service” and responding effectively”. These conclusions are even more evident in the outcome of our content analysis of the Japanese reviews, which revealed they greatly appreciate fast problem solving and helpful staff.

The results of the study by Resinger and Turner (1999), confirming that respect for others in service relates to good manners, as do punctuality, giving feedback, quickly solving problems, reducing waiting times and compensating waiting time with a gift or entertainment, are also in line with the results of our study, even though the two studies were conducted over a decade apart,

Some outliers were detected in the analysis, as detailed in 4.1.4. These outliers mainly highlight negative comments made by both the Japanese and Chinese.

4.1.4. Analysis of the Outliers

Concerning the Japanese Rating Reviews, some outliers were found there are six customer reviews for 4-star hotels, and five for 5-star hotels, as shown in Figure 4.5 detailed in Table 4.7.

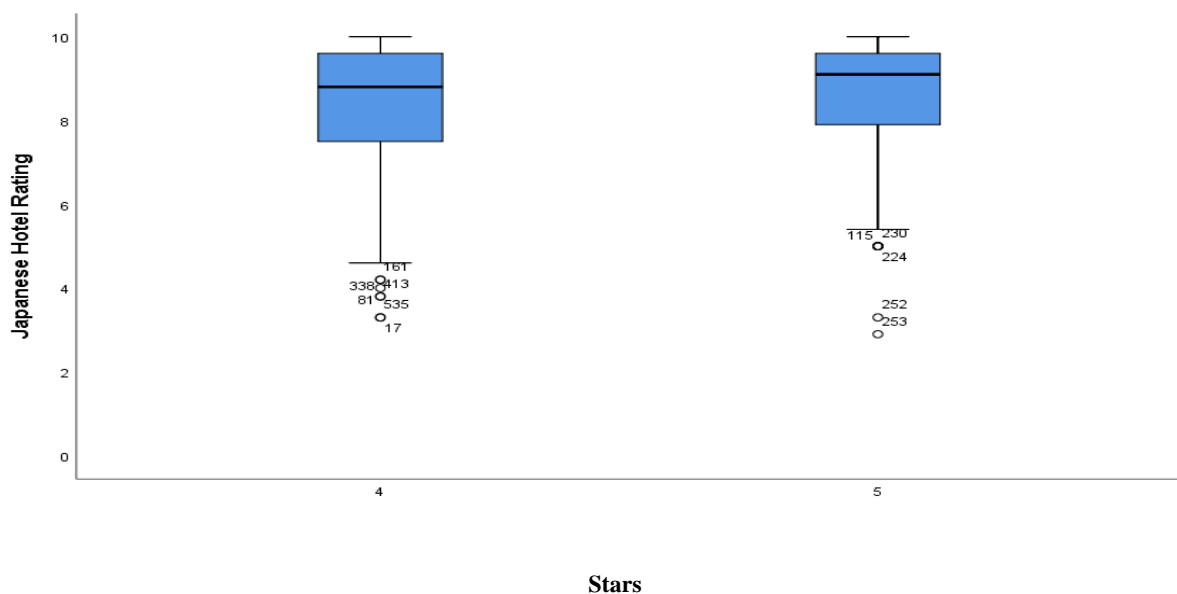


Figure 4.5: Japanese Reviews of 4 and 5-star Hotels - Outliers

Source: SPSS26 output

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Table 4.7: Japanese Outliers Rating and Summary of Comments

# Customer	Hotel Name	Star	Review Rating	Positive Comments	Negative Comments
17	Novotel Lisboa	4	3.3	No comments in writing	No comments in writing
81	Tryp Lisboa Aeroporto	4	4.0	<i>Location</i> (airport walking distance and bus). <i>Breakfast</i> (can be taken earlier)	<i>Attribution bedroom</i> (requested wedding bed, attributed twin bed). <i>Room Dusty, not well cleaned.</i>
161	VIP Executive Arts	4	4.2	No comments in writing	No comments in writing
338	Hotel Mundial	4	3.8	<i>Location.</i>	<i>Not a 4-star hotel. Not clean</i> (bathtub, slimy railing). <i>Sheets not changed. Few plugs. Value for money.</i>
413	Figueira Beautique	4	3.8	No comments in writing	Booking request to have 2 rooms next to each other not fulfilled. <i>Breakfast.</i>
535	Hotel Santa Justa	4	3.3	<i>Room size. Free Minibar. Welcome offers.</i>	<i>No lobby. Taxis cannot stop at entrance. View. Bathtub dirty</i> (did not use). <i>Safe hole.</i>
115	Sheraton Lisboa	5	5.0	No comments in writing	<i>Staff</i> (questions from staff colleagues at same time staff is talking with customer)
224	Avenida Palace	5	5.0	No comments in writing	<i>Soundproofing</i> (thin walls, could not sleep well).
230	Avenida Palace	5	5.0	No comments in writing	No comments in writing
252	Hotel Real Palácio	5	3.3	No comments in writing	No comments in writing
253	Hotel Real Palácio	5	2.9	No comments in writing	No comments in writing

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Some outliers were also identified in the Chinese Rating Reviews: twelve customer reviews of 4-star hotels, and five customer reviews of 5-star hotels. There was one severe outlier, as can be seen in Figure 4.6 and detailed in Table 4.8.

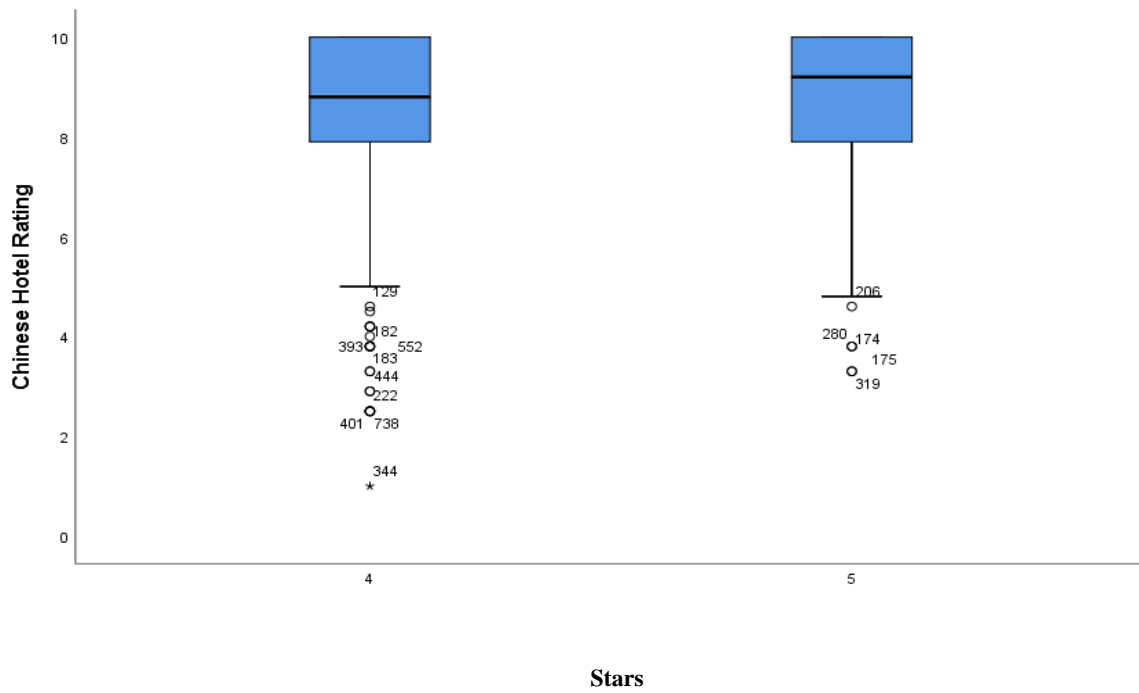


Figure 4.6: Chinese Reviews of 4 and 5- star Hotels - Outliers

Source: SPSS26 output

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Table 4.8: Chinese Outliers Rating and Summary of Comments

# Customer	Hotel Name	Review		Positive Comments	Negative Comments
		Stars	Rating		
129	Tryp Lisboa Oriente	4	4.6	No comments in writing	No comments in writing
182	Lisboa Marriott	4	3.8	No comments in writing	Unprofessional or impatient <i>staff</i> . <i>Poor Hygiene</i> (cockroaches).
222	Sana Evolution	4	2.5	No comments in writing	<i>Poor hotel, very poor cost performance.</i>
223	Sana Evolution	4	2.9	No comments in writing	<i>Value for money. Small room. Not 4-star standard.</i>
295	Sana Malhoa	4	2.5	No comments in writing	<i>Very bad service.</i>
393	Holiday Inn Lisbon	4	3.8	No comments in writing	<i>Bland Breakfast, it should be richer, more varied.</i>
401	Holiday Inn Lisbon	4	2.5	No comments in writing	No comments in writing
444	Ramada Lisboa	4	3.3	No comments in writing	<i>Not 4-star hotel. No slippers, toothbrush, toothpaste, tea bags. Uncomfortable blanket. Location</i> (far from old town). <i>Shampoo</i> (3 in 1). <i>Door</i> can't close (light). <i>Outdated Room. Bathroom</i> (too cramped). <i>Shower partition</i> (leaking).
552	Hotel Mundial	4	3.8	<i>Breakfast.</i>	
563	Hotel Mundial	4	4.5	No comments in writing	<i>Bad decor. Too noisy.</i>
591	Hotel Mundial	4	2.9	No comments in writing	No comments in writing
738	Turim Av. Liberdade	4	2.5	No comments in writing	<i>Elevator</i> hard to find. No helpful and no enthusiastic <i>staff</i> . <i>Small room, bathroom. Bad bed</i> (back pain). <i>Not 4 stars.</i>
344	VIP Executive Arts	4	1.0	No comments in writing	<i>Health.</i>
174	Sheraton Lisboa	5	3.3	No comments in writing	<i>Check-in</i> delay. <i>Staff</i> arrogant. <i>Noisy air conditioning</i> (cannot control it). <i>Old. No 5 stars</i> comparing with China.
175	Sheraton Lisboa	5	3.8	None	<i>Everything</i>
206	Epic Sana Lisboa	5	4.6	<i>Large Room.</i>	<i>Service</i> not adequate. <i>Park price. Check-in</i> (13h:30m)
280	Myriad	5	3.8	No comments in writing	No comments in writing
319	VIP Grand Lisboa	5	3.3	<i>Large corridor. Large room.</i>	<i>Hygiene. Soundproof.</i>

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The outliers are in the bottom range of classifications, with all of them having a negative rating equal to or below 5 points. One Chinese customer, comment number 344, gave a rating of 1 on a scale 1 to 10 (1 is bad and 10 is wonderful) making it the worst classification (isolated), and just one negative word “health”. While the majority of positive Japanese comments concern Location, Room Size, Free Minibar and Welcome Gifts, the negative Japanese comments are mostly to do with rude Staff, poor service regarding room attribution (receiving something different from what was requested), Cleanliness, Value for Money, Room Soundproofing and Room Safety. Positive Chinese comments focus on Large Hall or Room and Breakfast. Their negative wording is more detailed than Japanese, and focuses on Service, arrogant or unprofessional Staff, (check-in delay), Cleaning, Lack of Amenities, Room Soundproofing, Comfort, Decor (outdated or old facilities/room), Value for Money (not a 4- or 5-star hotel), which means that the hotel did not meet customer expectations. The Chinese also use more words to complain than the Japanese do. There was one Chinese comment about Hotel Mundial that was not accepted as it was deleted by booking.com for not complying with their code of ethics

The Chinese consider location, room features, and facilities more important than the Japanese, and the Japanese put more emphasis on service items, clear processes, and on getting exactly what was requested, since keeping a promise is very important in Japanese culture, with one’s word being as binding as a signed contract). In the case of outliers, cleaning and service are highlighted by both the Japanese and Chinese.

The differences and similarities of Hotel Attributes are summarised as follows: Differences between Japanese and Chinese Customers (Table 4.9.) and Similarities (Table 4.10.).

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Table 4.9: Hotel Attributes - Differences between Japanese and Chinese Customers

	Japanese	Chinese
Location	Hotel location far from shops, restaurants, and supermarkets. (Highest frequency of negative wording: 38%)	Hotel location far from tourist attractions. (Highest frequency of negative wording: 30%)
Facilities	Restaurant, Bar, Lobby (27% of positive wording)	Restaurant, Bar, Lobby (only 11% of positive wording)
	Historical design and furniture hotels appreciated.	Historical design and furniture hotels seen as old and outdated.
Room	Room features (Comfort, Size, Bed) less important to Japanese than Chinese (34% versus 59% of positive wording)	Room features (Comfort, Size, Bed) less important to Japanese than Chinese (34% versus 59% of positive wording)
	The room design for the Japanese appears as one of the most negative comments, mainly because of bathroom-room integration (lack of privacy), lack of natural light or view.	Room design as a negative general comment or mainly associated with words like old, outdated.
	Existence of bathtub is relevant for Japanese and mentioned as positive and negative (no bathtub)	Existence of bathtub of no relevance for Chinese.
	Hot Water more important for Japanese than Chinese in the negative and positive comments. Connected with bathtub (Japanese need hot water to have a relaxing bath).	Hot Water more important for Japanese than Chinese in the negative and positive comments.
	Room Equipment easy to use, important to Japanese.	Room Equipment easy to use, not relevant to Chinese.
Breakfast	Japanese need vegetables at breakfast.	Existence of vegetables at breakfast not relevant to Chinese. However, some Chinese food was mentioned as a plus.
Staff	Unhelpful or not pro-active staff and no clear procedures or bad information are the most negative comments. (No help or misinformation about what to do, existence of restaurants nearby, transports or breakfast timetable).	Enthusiastic , smiling Staff is important to Chinese (not smiling means that staff are not enjoying what they are doing). No relevance for Japanese. Front office is one of the main negative Chinese comments .
Price	Price and Value for money is less relevant for Japanese than Chinese.	Price and Value for money is less relevant for Japanese than Chinese. Chinese mentioned several times that “it is not a 4- or 5-star hotel.”

Source: Own Elaboration

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Table 4.10: *Hotel Attributes - Similarities between Japanese and Chinese Customers*

	Japanese and Chinese Similarities
Location	Importance of Hotel being near public transport (more than 38% of positive wording for both)
Facilities	Importance of new, renovated, modern facilities.
	Elevator, Hardware, Software outdated or not working well one of the most negative comments.
Room	Room equipment not working properly (24% and 21% of negative comments Japanese versus Chinese).
	Existence of Kettle . (Tea is very important for Asians, mainly for old people.)
	Appreciated Quiet and Soundproofed Room.
	Appreciated and expect Amenities in the room (such as, slippers, toothbrush, and toothpaste, ...)
	Appreciated Cleaning mentioned in positive, negative comments.
Breakfast	Need of diverse, rich breakfast, not bland (Japanese or Chinese dishes appreciated).
	Appreciate tasty and good breakfast (Portuguese egg pie mentioned several times)
	Appreciate early availability (early check-outs).
Staff	Appreciate nice, kind, friendly, helpful and pro-active Staff.
	Appreciate clear processes and information given by the staff , if not, it is seen as unprofessional attitude.
	For the Japanese a lack of apology and explanation is also seen as rude behaviour and a sign of unprofessional service.
Price	Not clear payment and invoice processes led to relevant negative comments from both.

Source: Own Elaboration

4.2. Managers and Experts Interviews

The interviews of hospitality managers and experts were carried out in Portuguese and were intended to help construct the theoretical model and design the questionnaire.

The interviews were conducted in a mixture of face-to-face meetings, on WhatsApp or by phone. The respondents asked for anonymity and while some interviews could be recorded, it was only possible to use those recordings to complete the handwritten notes. Notes were taken and the content analysed and grouped in accordance with the balanced scorecard dimensions (Market and Customer, Processes and Procedures, People and Finance) and oriented as strategy before and after covid-19. The interviewer played a neutral role. Interview details of each participant are set out in Appendix E. The summary of the outcome of the interviews followed the qualitative steps: similar words grouped with same code (open code), then groups of codes formed categories (axial coding) and then, finally, selective coding was done as detailed in Figure 4.7. The Interview Results are shown in Table 4.11

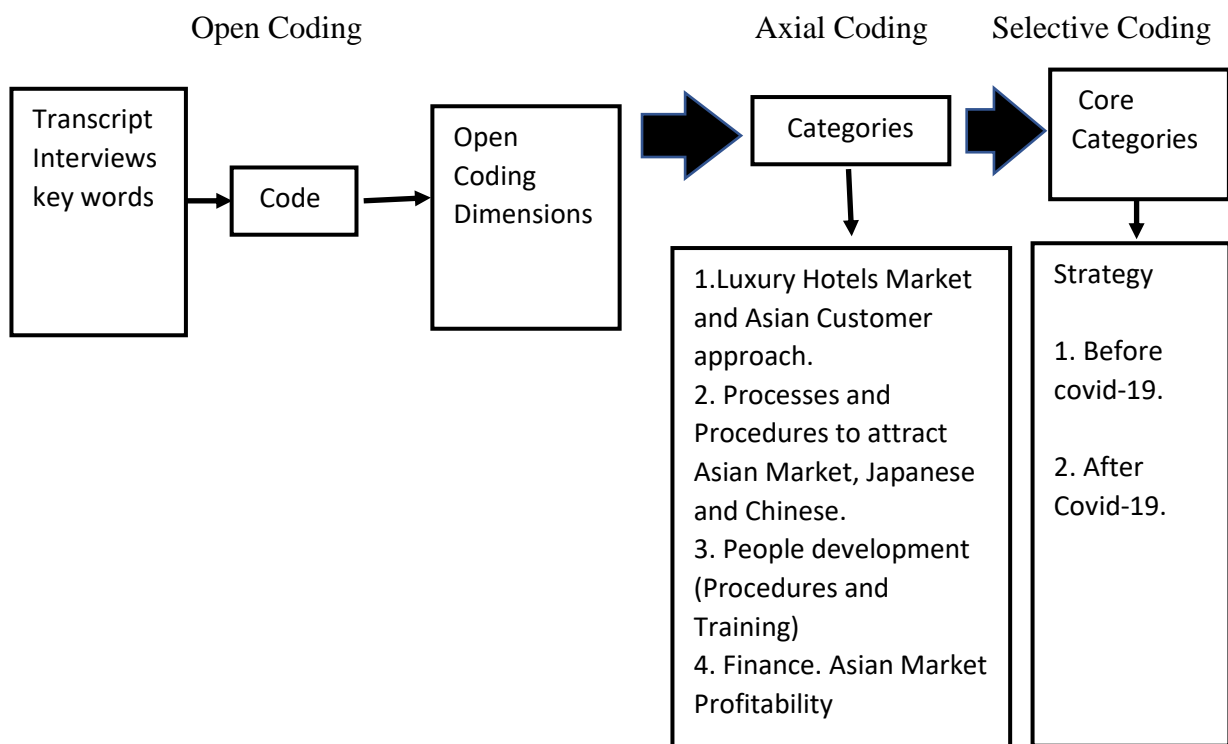


Figure 4.7: Flow Chart of Hospitality Managers and Experts Interview content data analysis

Source: Own Elaboration

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Table 4.11: Hospitality Managers and Experts Interview Results

Interviews wording	Balanced Scorecard Dimensions	Strategy
<ul style="list-style-type: none"> - Asian Market Important to Portugal - Asian Market Important to luxury hospitality with regard to the Asian Market, it is mainly concerned with the Chinese Market. - Chinese Market has more opportunities to grow, and to grow faster than the Japanese market. However, the Japanese market is an older market in Portugal. - The Japanese market works solely based on Tourism Portuguese Office initiatives, because of the investment amounts involved to attract Japanese market (trips, marketing, ...). This market was not a priority. Some initiatives were taken for the Chinese Market (some hotel chain representatives flew to China). Nothing was done concerning the Japanese market. - The Japanese and Chinese customers are seen as satisfied with Hospitality service. - Japanese tourists are seen as travelling in an older age group. These income tourists are the result of travel agency agreements, working series/groups mainly based in UK. 	<p>Market and Customer</p>	<p>Before Covid-19</p>
<ul style="list-style-type: none"> - Processes and procedures are standard independently of customer origin apart from breakfast being adapted when they have Asian customers (to include Asian food). - Attribution of room with bathtub, one hotel rebuilt two floors to include a bathtub in the rooms. In general, the room attribution does not take customer origin into consideration. - One hotel chain has a dedicated international program to attract Chinese Businesses men. 	<p>Processes and Procedures</p>	<p>Before Covid-19</p>

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Interviews wording	Balanced Scorecard Dimensions	Strategy
<p>-There is no policy in place dedicated to recruiting staff to deal with Asian Markets.</p> <p>-The Hotel Chains prefer to contract a native person with the same nationality as their prospective customers, such as: a Chinese, a German, ...</p> <p>-The hospitality and tourism schools are good hospitality staff sources.</p> <p>- For Hotel Director, there is a preference for people with hospitality experience. For other director positions or staff, people with experience in other sectors are welcome. The right attitude is a must, as other competencies are trainable.</p> <p>In general, there is no training in Asian culture, and service training is standard and, on the whole, aligned with European culture.</p> <p>-There is a continuous improvement policy, which all staff can contribute to, controlled by the quality or human resources department but this is almost wholly dedicated to cultures closer to European.</p>	People	Before Covid-19
<p>-Asian, Chinese and Japanese could be profitable markets but the effort required to attract them is too great. It is easier and less expensive to deal with countries closer, both culturally and geographically.</p> <p>-There was no long-term strategy in place, apart from the official Portuguese Tourism office strategy.</p>	Finance	Before Covid-19

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Interviews wording	Balanced Scorecard Dimensions	Strategy
<p>- A different strategy to attract the Asian Market should be implemented.</p> <p>-Marketing approach is not consensual. Too expensive to advertise in these markets.</p> <p>-Clear check-in information, more in-house dining, more flexibility to react in case of emergencies.</p> <p>-Strategy to attract the new traveller's millennial/generation Z in the Japanese and Chinese Markets.</p> <p>Long-haul flight connections are important to develop Asian markets. Attracting the Japanese market will be even more difficult in the near future.</p> <p>The strategy should be differentiated, the advantage of historical heritage should be capitalized.</p> <p>-Personal security and strategic service should be developed for the Japanese market segment. Asian market, Halal tourism and European East Markets should be developed.</p>	Market and Customer	After Covid-19
<p>-Different processes and procedures to attract Asian Markets should be implemented.</p> <p>-The first markets to recover will be the European ones and the "saudade/nostalgia" market, from countries where Portugal has emigrants. Only in 2022, will it be possible to attract the Asian and USA markets once again.</p> <p>-The priority will be to develop processes and procedures according to Covid- 19 necessities, develop people, market and finance as a result of the other three.</p>	Processes and Procedures	After Covid-19
<p>-There is little agreement on the approach to People training, some think it should be different, others do not have a formal opinion.</p>	People	After Covid-19
<p>-Asian, Chinese and Japanese markets will be profitable.</p> <p>-Nowadays, we are experiencing a problem of security and not price issues. Studies demonstrate there is no loss of acquisition power. Market pressure is leaning towards lowering prices, with demand decreasing because of security problems and not price.</p>	Finance	After Covid-19

4.3. Survey

The survey used a written questionnaire, conducted in Portuguese, and sent by mail and via LinkedIn connections. The following types of respondents had been previously selected: Experts and Managers (including front-office) in the hospitality sector and Managers in other sectors of activity, working in Japanese companies or with experience with Japanese customers.

The questionnaire has four main objectives:

1) To identify the managers (respondents) characteristics (Sector, Age and Sex): Questions n° 1 to 5.

2) To test the respondents' knowledge about the Asian Market (Japanese and Chinese), evaluating the differences by sector: 1) Automotive and Other Industries; 2) Bank, Insurance and other Services; 3) Education and Consultancy and 4) Hospitality and Tourism, to compare those findings with the literature review and booking.com analysis: Questions n° 7 to 9.

3) To confirm interview results pertaining to Portuguese Luxury Hotel Recruitment Policies and Portuguese Hospitality Schools: Questions n° 12.

4) To conclude about Strategy (before covid-19) concerning the approach to Asian markets (Japanese and Chinese) based on the four balanced scorecard dimensions (market, processes and procedures, people and finance), and to see how the hospitality strategy of managers and experts with experience in hospitality compares with that of managers with experience in other sectors of activity: Questions n°6 (Market); Questions n°10 (Processes and Procedures), Questions n°11 and n° 13 (People) and Questions n°14 (Finance).

5) To conclude about Strategy (after covid-19), concerning market developments and the balanced scorecard dimensions development priorities, to see whether managers and experts with experience in hospitality think about hospitality strategy in the same way as managers with experience in other sectors of activity: Questions n° 15 to 18.

The questionnaire was structured to take into consideration the following outcomes: literature review, analysis of Japanese and Chinese reviews on booking.com, and the interviews, as summarised in Table n° 4.12.

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Table 4.12: Composition of Questionnaire

Questions	Source
Strategy Before Covid-19	
Market	
Q.6 - Market	
Q6.1 Asian Market was important to Portugal.	Turismo de Portugal’s Director Exploratory Interview and Portuguese Tourism Strategy 2027
Q6.2 Asian Market was important to Luxury Hotels.	Grounded Theory – Interviews of hospitality top managers and experts.
Q6.3 Chinese Market was important to Luxury Hotels.	Grounded Theory– Interviews of hospitality top managers and experts.
Q6.4 Japanese Market was important to Luxury Hotels.	Grounded Theory– Interviews of hospitality top managers and experts.
Q6.5 Luxury Hotels have equal approach to Chinese and Japanese Market.	Grounded Theory– Interviews of hospitality top managers and experts. Appiah-Adu et al. (2000); Crotts and Erdmann (2000); Matilla (2000); Kuo (2007); Litvin et al. (2008), Reisinger & Turner (2008); Tao (2010); Assiouras et al. (2015); Zhang et al. (2015); Ozdemir and Yolal (2017)
Test the knowledge about Asian customer	
Q7. Customer Satisfaction-Japanese	
Q7.1 Chinese customers were delighted with Portuguese Luxury Hotel service quality.	Grounded – Interviews of hospitality top managers and experts and online analysis of booking.com reviews.
Q7.2 Japanese customers were delighted with Luxury Hotels ‘service quality.	Grounded– Interviews of hospitality top managers and experts and online analysis of booking.com reviews.
Q7.3 Portuguese Luxury Hotels offer standard service regardless of customers’ country of origin.	Grounded – Interviews of hospitality top managers and experts and online analysis of booking.com reviews.
Q8. The Japanese customer	
Q8.1 Mainly collectivist and not individualist.	Hofstede (1980); Ahmed and Krohn (1992); Pizam and Sussmann(1995); Fernandez et al. (1997); Resinger and Turner (1999); Piers et al. (2010).
Q8.2 Values security more highly than westerners do.	Hofstede (1980); Ahmed and Krohn (1992); Pizam and Sussmann(1995); Resinger and Turner (1999).
Q8.3 Like to travel alone.	Hemmington (2007).
Q8.4 Like to experience new world.	Hofstede (1980); Pizam and Sussmann (1995).
Q8.5 Collect photos and souvenirs.	Ryu et al. (2014); Assiouras et al. (2015); Williams et al. (2017; 2020)
Q8.6 Directly communicate their opinion about service.	Hofstede (1980); Pizam and Sussmann (1995); Bui and Trupp (2020).
Q8.7 Share their travel experience with family and friends.	Mooij and Hofstede (2011); Wan (2013).

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<p>Q8.8 Smiling face at front office is more important than ability to solve problem situations.</p> <p>Q9. More Important for Japanese than Chinese</p> <p>Q9.1 Hotel decoration.</p> <p>Q9.2 Hotel location.</p> <p>Q9.3 Smiling and enthusiastic employees.</p> <p>Q9.4 Proactive staff who can quickly solve problems.</p> <p>Q9.5 Room with bathtub.</p> <p>Q9.6 Clear procedures on how to work with room equipment (TV, A/C, ...).</p> <p>Q9.7 Price.</p>	<p>Liu et al. (2001); González ey al. (2007); Mooij and Hofstede (2011); Wan (2013)</p> <p>Booking.com reviews online analysis.</p> <p>Magnini et a. (2011), Liu et al. (2017); online analysis of Booking.com reviews.</p> <p>Magnini et a. (2011), Liu et al. (2017); online analysis of Booking.com reviews.</p> <p>online analysis of Booking.com reviews.</p> <p>Resinger and Turner (1999); online analysis of Booking.com reviews.</p> <p>online analysis of Booking.com reviews.</p> <p>Magnini et a. (2011), Liu et al. (2017); online analysis of Booking.com reviews.</p> <p>Pizam and Sussmann (1995); Oh (1999); Zhou et al. (2014); online analysis of Booking.com reviews.</p>
<p>II. Processes and Procedures</p> <p>Q10. Processes and Procedures - Portuguese Luxury Hotels should have (important to Asian customers)</p> <p>Q10.1 Standard procedures regardless of customer country of origin.</p> <p>Q10.2 Breakfast should include vegetables and Asian food.</p> <p>Q10.3 Room attribution standard regardless customer country of origin.</p> <p>Q10.4 All luxury hotels rooms should have a kettle.</p> <p>Q10.5 Courtesy gifts and amenities offers (water, slippers) are important to Chinese and Japanese customers.</p> <p>Q10.6 Verify before check-in whether room equipment is working well.</p> <p>Q10.7 Emergency Direct Line in the room.</p> <p>Q10.8 Clear instructions on how to work with room equipment at check-in.</p>	<p>King C. (1995); Armstrong et al. (1997); Crotts and Erdmann (2000); Mattila (2000); Reisinger and Turner (2008).</p> <p>Tsaur et al. (2008); Torres at al. (2014); Kasiri (2017); Liu et al. (2017).</p> <p>Lee and Zhao (2018).</p> <p>Online analysis of Booking.com reviews.</p> <p>King C. (1995); Armstrong et al. (1997), Crotts and Erdmann (2000).</p> <p>Online analysis of Booking.com reviews.</p> <p>Choi and Chu (2000), Zhou et al. (2014); Lee and Zhou (2018).</p> <p>Online analysis of Booking.com reviews.</p>
<p>III. People Development</p> <p>Q11. Front Office - Portuguese Luxury Hotels (in general)</p> <p>Q11.1 Attending to customers is the same for all customers.</p> <p>Q11.2 Room customer attribution is standard and random.</p> <p>Q11.3 In case of check-in delay, staff apologise and offer welcome drink or other compensation.</p> <p>Q11.4 Staff have information to advise customers concerning restaurants, shops and transport nearby.</p> <p>Q11.5 Staff have a proactive reaction to solving problematic situations.</p>	<p>King C. (1995); Armstrong et al. (1997); Crick and Spencer (2011); Berenzina (2015).</p> <p>King C. (1995); Armstrong et al. (1997).</p> <p>Resinger and Turner (1999); Briggs et al. (2007); Hemmington (2007); Tsang and Ap (2007).</p> <p>Ekiz et al. (2012).</p> <p>Briggs et al. (2007); Tsang and Ap (2007); Mohsin and Lockyer (2010); Ekiz et</p>

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Q11.6 Staff have a happy and sincere smile.	al. (2012). Online analysis of Booking.com reviews.
Q12. Recruitment Policies - Portuguese Luxury Hotels (in general)	
Q12.1 Have a specific staff recruitment policy to recruit staff to be dedicated to Asian markets.	Resinger and Turner (1999); Kuo (2007); Tsang and Ap (2007); Ekiz et al. (2012) Briggs et al. (2007); Tsang and Ap (2007); Mohsin and Lockyer (2010); Tsaur and Lin (2004).
Q12.2 Hospitality and Tourism schools are a good source of professionals for luxury hotels.	Grounded Theory– Interviews of hospitality top managers and experts.
Q12.3 Hospitality and Tourism prepare professionals to deal with Asian markets.	Grounded Theory– Interviews of hospitality top managers and experts.
Q12.4 For management positions, hotel chains prefer professionals with experience in hospitality.	Grounded Theory– Interviews of hospitality top managers and experts.
Q12.5 For management positions, professionals with experience in other sectors of activity, could be an added value for the hospitality sector.	Grounded Theory– Interviews of hospitality top managers and experts.
Q12.6 For under management positions, hotel chains prefer professionals with experience in hospitality.	Grounded Theory– Interviews of hospitality top managers and experts.
Q12.7 For under manager positions, professionals with experience in other sectors could be an added value for hospitality sector.	Grounded Theory– Interviews of hospitality top managers and experts.
Q13. Training and Continuous Improvement	
Q13. Training Policies - Portuguese Luxury Hotels (in general).	Matilla (2000); Weiermair (2000); Reisinger and Turner (2002); Tsaur and Lin (2004); Kuo (2007); Tsang and Ap (2007); Kim et al. (2014); Kim et al. (2015); Lee and Zhao (2018).
Q13.1 Staff should be trained in Asian Culture.	
Q13.2 Staff should be trained in Chinese Culture.	
Q13.3 Staff should be trained in Japanese Culture.	
Q13.4 Training standard in front-office attendance regardless customer country of origin.	Matilla (2000); Weiermair (2000); Reisinger and Turner (2002); Tsaur and Lin (2004); Kuo (2007); Tsang and Ap (2007); Kim et al. (2014); Kim et al. (2015); Lee and Zhao (2018); Wikhamn (2019).
Q13.5 Hotels should have a continuous improvement policy.	Mogi (2017), Toyota Way; booking.com reviews online analysis.
Q13.6 Staff should be able to propose improvements.	Toyota Way; – online analysis of Booking.com reviews.
Q13.7 Hotels should have a continuous improvement department.	Toyota Way; - online analysis of Booking.com reviews.

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<p>IV. Finance and Sustainability Q14. Finance and Long-Term Strategy Q14.1 Asian Market was profitable. Q14.2 Chinese Market was profitable. Q14.3 Japanese Market was profitable. Q14.4 Hotel chains had a long-term strategy to attract and retain Chinese tourists. Q14.5 Hotel chains had a long-term strategy to attract/retain Japanese tourists.</p>	<p>Grounded Theory– Interviews of hospitality top managers and experts. Grounded Theory– Interviews of hospitality top managers and experts. Grounded Theory– Interviews of hospitality top managers and experts. Pizam and Susmann (1995); Kim at al. (2011); Turespana-Fijas ejutivas by market (2017). Jonhson et al. (1995); Soares at al. (2007); Hofstede and Monkov (2010).</p>
<p>Strategy After Covid-19 Q15. Profitability Q15.1 Asiatic Market will be profitable. Q14.2 Chinese Market will be profitable. Q14.3 Japanese Market will be profitable.</p>	<p>Grounded Theory– Interviews of hospitality top managers and experts. Grounded Theory– Interviews of hospitality top managers and experts. Grounded Theory-Interviews of hospitality top managers and experts.</p>
<p>Q16. Strategy (changes after Covid-19) Q16.1 Strategy as a whole. Q16.2 Processes and Procedures. Q16.3 Marketing Actions. Q16.4 Training Actions.</p>	<p>Grounded Theory– Interviews of hospitality top managers and experts. Grounded Theory– Interviews of hospitality top managers and experts. Grounded Theory-Interviews of hospitality top managers and experts. Grounded Theory-Interviews of hospitality top managers and experts.</p>
<p>Q17. Priorities for improvement and development Q17.1 People Development and Training. Q17.2 Marketing and Attracting Customers. Q17.3 Profitability. Q17.4 Decor and Image. Q17.5 Processes and Procedures.</p>	<p>Grounded Theory– Interviews of hospitality top managers and experts. Grounded Theory– Interviews of hospitality top managers and experts. Grounded Theory-Interviews of hospitality top managers and experts. Grounded Theory-Interviews of hospitality top managers and experts. Grounded Theory-Interviews of hospitality top managers and experts.</p>
<p>Q18. Markets Priority for development and return EUA, Brazil, Japan, Australia, Canada, China, African Countries and European Countries.</p>	<p>Grounded Theory– Interviews of hospitality top managers and experts.</p>

4.3.1. Questionnaire Pre-test

The questionnaire was divided into several parts as follows:

- 1) Questions in 1 to 5 relate to respondent's characteristics: Sector, Hotel (if hospitality sector), Job Title, Gender and Age.
- 2) Questions in 7, 8 and 9, test what respondents know about the Japanese tourist (customer) and how they differ from the Chinese.
- 3) Questions in 12 are related to hotel recruitment policies and hospitality schools. These results will be compared with the interview results for confirmation.
- 4) Strategy before covid-19: Questions in 6 relate to the Market, Questions in 10 relate to Processes and Procedures, Questions in 11 and 13 relate to People (Front-office competences, Training and Continuous improvement policies) and Questions in 14 relate to Finance (Profitability).
- 5) Strategy After-Covid19: Questions in 15 (Profitability), Questions in 16 (Strategy changes), Questions in 17 (Balanced Scorecard Dimensions priorities for Improvement), Questions in 18 (priority markets).

After the questionnaire was tested by the five top management and hospitality experts' interviewees, several modifications were made in accordance with the feedback received. The introduction was reduced to a brief explanation about the project, its objectives, and the confidentiality of responses. The rating of response options for Questions (n°8 and n°9) about the differences between Japanese tourists (customers) and Chinese tourists was changed from a 1 to 5 Likert scale to a Yes, No and Don't Know answer.

To fulfil the objectives of the questionnaire, the questionnaire was analysed, as follows:

Concerning parts n°1), 2) and 3) above, descriptive statistics, means comparison, standard deviation and hypothesis testing to compare sectors groups were calculated in order to understand the differences between the different sectors of activity for each subject of the questionnaire and the don't know answers to evaluate to what extent the subject is either known or not known among the sectors.

Concerning part n°4 (strategy before covid-19), Principal Components Analysis (PCA), the CITC (corrected total item correlation) of every item and the Cronbach's alpha of every sub-dimension (0.5 for CITC and 0.7 for Cronbach's alpha) were applied. SEM was used to estimate an explanatory model for strategy before Covid.

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Concerning part nº5 – strategy after-covid, descriptive statistics, means comparison and standard deviation were run through SPSS26.

In total, 501 questionnaires were sent out and 267 were returned (53%). Of those, the questionnaires that had been completed 50%, or more, were considered valid, which gave a total of 187 questionnaires (100%: 159 responses; 75%: 11 responses; 70%: 1 response; 55%: 8 responses; 50%: 8 responses). In an attempt to find out why some gave up in the middle of completing the questionnaire, phone calls were made, and the feedback received was: “the subject is too unknown, hard to take a position or have an opinion on”. And, despite the fact that in some cases the respondents are or had been working in Japanese Companies or working in hospitality, there was a lack of knowledge about Asian Customers and differences between the Japanese and Chinese.

4.3.2. Respondents’ Characteristics

Of the 187 valid responses, 30 are from the Automotive and Other Industries sectors, 53 from Banking, Insurance and Other Services, 40 from Education and Consultancy and 64 from Hospitality and Tourism as detailed in Table 4.13.

Table 4.13: *Responses by Sector*

Sector	Frequency	Percent
Automotive and Other Industries	30	16.0
Banking, Insurance and Other Services	53	28.3
Education and Consultancy	40	21.4
Hospitality and Tourism	64	34.2
<i>Total</i>	<i>187</i>	<i>100.0</i>

The objective of the sample selection was to obtain feedback from people in management positions and entrepreneurs. Only 11% of the respondents have job positions below that of manager (excluding front-office and reservations) as detailed in Table 4.14.

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Table 4.14: Job Position

Job Position	Frequency	Percent
Administration or Director	46	24.6
Manager or Assistant Manager	48	25.7
Below Manager or Assistant Manager	21	11.2
Entrepreneur or independent worker	43	23.0
Front office or reservations	6	3.2
Other	23	12.3
<i>Total</i>	<i>187</i>	<i>100.0</i>

Below are the socio-demographic profiles of the sample by Sex (Table 4.15) and by Age (Table 4.16).

90% of the respondents are more than 30 years old, in line with the requirements for the sample selection, given that management positions need professional experience and that is only possible after a certain age. This confirmed that the descriptive statistics results are in line with the requirements for the sample selection.

Table 4.15: Distribution by Sex

Sex	Frequency	Percent
Male	86	46.0
Female	101	54.0
<i>Total</i>	<i>187</i>	<i>100.0</i>

Table 4.16: Distribution by Age

Age	Frequency	Percent
18-30	18	9.6
31-50	100	53.5
>50	69	36.9
<i>Total</i>	<i>187</i>	<i>100.0</i>

4.4. Crossover Studying Using the Variables Sex and Age versus different Sectors of Activity

Crosstabulations were calculated between variables sector and age group and sex.

Concerning the variable sex, a Post Hoc Test (Scheffe) was run. The results show that there are statistically significant differences between the Automotive and Other Industries and the other three sectors, two subsets should be made for alpha = 0.05. On average, there is a higher percentage of males in the Automotive sector and other industries than in the other three sectors.

With regard to the variable, age by sectors, a Post Hoc Test (Scheffe) was run. There are statistically significant differences between Hospitality and Tourism and other three sectors. Hospitality and Tourism respondents have a lower average age than the other three sectors, reflecting the inclusion of front-office management staff. The hotel frontline employees play a key role in customer satisfaction and prompt customers to write positive online reviews. Given that the two major categories in the consumer complaints were: both rooms and hotel staff attitude need improving (Berezina, 2015), the inclusion of front-office management in the study is important.

Table 4.17: Sectors Differences (Sex and Age)

Variable	Sectors Differences
Sex	<p style="text-align: center;"><i>Automotive has more males than the other sectors</i></p> <p>Automotive and Other Industries (77% of males) versus the three other group sectors (Hospitality and Tourism, Education and Consultancy and Bank, Insurance and Other Services with 39%, 43% and 40% of males correspondently).</p>
Age	<p style="text-align: center;"><i>The average age in Hospitality is lower than the average age in the other sectors.</i></p> <p>Hospitality and Tourism (78% with more than 30 years old) versus the three other group sectors (Automotive and Other Industries, Education and Consultancy and Bank, Insurance and Other Services with 97%, 100% and 94% with more than 30 years, correspondently)</p>

4.4.1 Japanese Cultural Knowledge Analysis

A descriptive statistical analysis was made considering the sample (valid and missing). It is important to separate the missing because that is related to the “Don’t Know Answers”, and to then evaluate the knowledge by sector and draw conclusions about differences or similarities.

Means were compared by sector and the standard deviation analysed. Questionnaire items Q7, Q8 and Q9 were only there to test respondents and experts’ knowledge about Japanese Culture and to compare that with the interviewees’ knowledge. As explained before, the respondents had been carefully chosen according to the following characteristics: hospitality or tourism experience (in hospitality or tourism sector or education), working in Japanese companies or experience dealing with Japanese or experts in Japanese culture. The results showed that there is room for improvement in Knowledge about Japanese culture.

Concerning customer satisfaction, the opinions (perceptions) are that the Chinese and Japanese were satisfied with the luxury hotel service, and that luxury hotel service standards do not take into account the customer’s country of origin, as detailed in Table 4.18.

Table 4.18: Respondents Opinion by Sector about Japanese Tourist Customer Satisfaction with 4- and 5-star hotels (luxury)

Questions	n	Mean	Std Deviation	Levene Test Sig	ANOVA Sig
Q7.1. Chinese customers were delighted with Portuguese Luxury Hotel service quality.	124	4.11	.703	.992	.505
Q7.2. Japanese customers delighted with Luxury Hotel service quality.	115	4.11	.744	.568	.245
Q7.3. Portuguese Luxury hotels offer standard services regardless of county of origin	142	4.14	1.009	.372	.039

Note: Total N = 187. Missing = Don’t Know and Do not want to answer. Mean, Std Deviation based on n answers within 1 to 5 Likert scale (1-totally disagree, 2-disagree, 3- not agree or disagree, agree and 5-totally agree) that means, n=Total N excluding missing.

According to the Levene test, there is equality of the four sectors’ variances (sig>.05). Q7.1 and Q7.2 have equal means by sector (sig>.05). As such, there is no need to analyse the results of the multiple comparison test. However, this is not the case for Q7.3. The Post Hoc Test (Scheffe) was run, and a significant difference was found between the automotive and other industries’ sector with the highest mean of 4.1 and the education and consultancy sector with the lowest mean of 3.3, as shown in figure 4.8.

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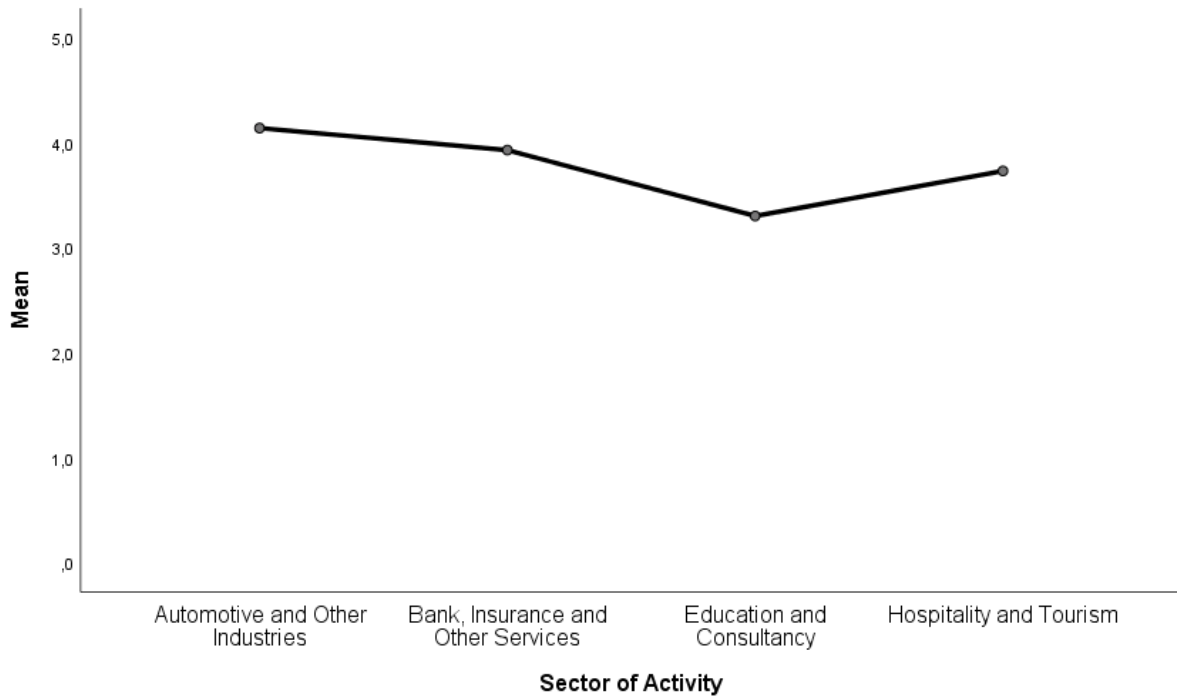
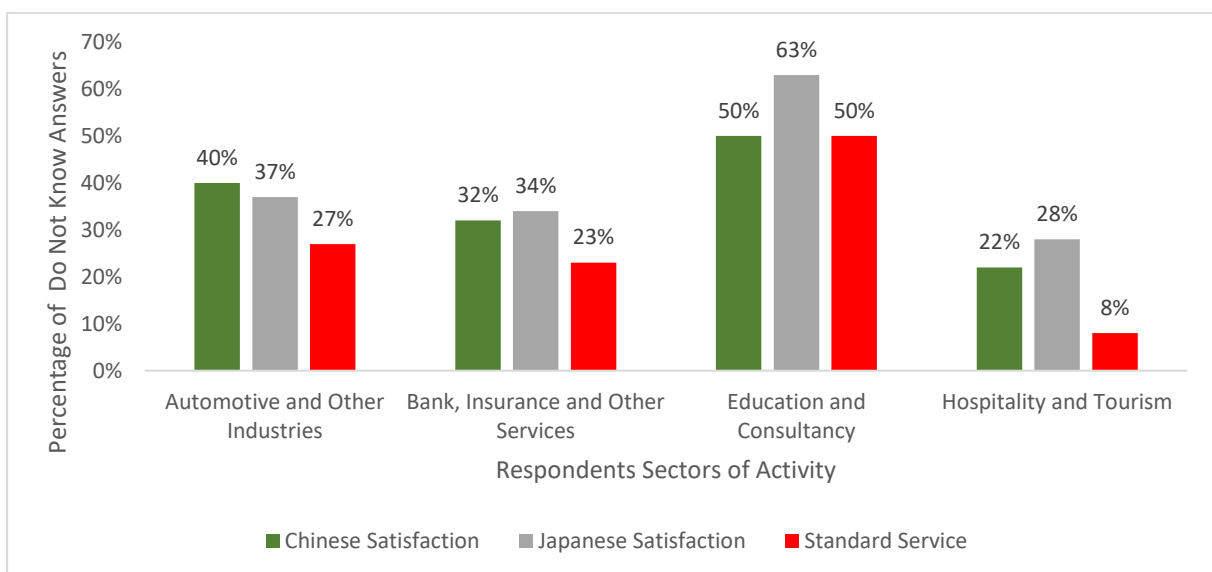


Figure 4.8: *Luxury hotels offer standard services regardless of county of origin*
Means by sector of activity

With regard to this subject, the Hospitality and Tourism sector is the sector with the lowest rate of don't know answers. However, the item related to Chinese satisfaction registered the highest lack of knowledge in three of the sectors (Banking, Insurance and Other Services, Education and Consultancy and Hospitality and Tourism). Education and Consultancy is the sector with the least knowledge in the subject, as shown in Figure 4.9.



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Figure 4.9: *Luxury Hotels Customer Service (Don't Know Answers)*

Questions number 8 and 9 test respondents' knowledge about cultural characteristics. The results showed that aspects such as the Japanese liking to feel safe (security), to travel in a group, wanting to experience new worlds, to collect evidence of travel (souvenirs) and gifts, and to share their travel experiences with friends and family were all recognized as being important by hospitality management and other sector managements in more than 50% of the responses received. Respondents deemed clear procedures, and staff reacting proactively to solving problems, to be of more importance to the Japanese than the Chinese, as these aspects received more than 50%. There was less clarity regarding other items, which were either unknown or mixed. For example, a "room with bathtub" being very important to Japanese received a don't know answer from 48% of people working in the hospitality and tourism sector, and 67% for people working in other sectors of activity. The distributions of answers (yes, no, not know) were compared between Hospitality and Tourism and all other sectors together. There is similar patterns of answers and differences are not evident as detailed in Table 4.19. and Table 4.20.

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Table 4.19: Respondents Opinion by Sector about Japanese Tourists Cultural Characteristics

Q.8. Japanese Tourists Cultural Characteristics	Yes	No	Not Know	Total	Yes	No	Not Know	According to the Literature Review
<i>Q8.1. Mainly Collectivist and not Individualist</i>								<i>Collectivist</i>
Hospitality and Tourism	28	21	15	64	44%	33%	23%	
Other Sectors	49	34	40	123	40%	28%	33%	
<i>Total</i>	<i>77</i>	<i>55</i>	<i>55</i>	<i>187</i>	<i>41%</i>	<i>29%</i>	<i>29%</i>	
<i>Q8.2. Security more important than for Western Tourists</i>								<i>Security: the most important to travel</i>
Hospitality and Tourism	34	15	15	64	53%	23%	23%	
Other Sectors	73	16	34	123	59%	13%	28%	
<i>Total</i>	<i>107</i>	<i>31</i>	<i>49</i>	<i>187</i>	<i>57%</i>	<i>17%</i>	<i>26%</i>	
<i>Q8.3. Like to travel alone</i>								<i>Group Travel</i>
Hospitality and Tourism	18	36	10	64	28%	56%	16%	
Other Sectors	27	60	36	123	22%	49%	29%	
<i>Total</i>	<i>45</i>	<i>96</i>	<i>46</i>	<i>187</i>	<i>24%</i>	<i>51%</i>	<i>25%</i>	
<i>Q8.4. Like to experience new world</i>								<i>Likes to experience new world</i>
Hospitality and Tourism	60	1	3	64	97%	2%	2%	
Other Sectors	96	2	25	123	78%	2%	20%	
<i>Total</i>	<i>156</i>	<i>3</i>	<i>26</i>	<i>187</i>	<i>84%</i>	<i>2%</i>	<i>14%</i>	
<i>Q8.5. Like to collect photos and souvenirs</i>								<i>Collect evidence of travel and gifts</i>
Hospitality and Tourism	54	4	6	64	84%	6%	9%	
Other Sectors	101	6	16	123	82%	5%	13%	
<i>Total</i>	<i>155</i>	<i>10</i>	<i>22</i>	<i>187</i>	<i>83%</i>	<i>5%</i>	<i>12%</i>	
<i>Q8.6. Directly communicate their opinion about service</i>								<i>No direct communication</i>
Hospitality and Tourism	23	23	18	64	36%	36%	28%	
Other Sectors	40	28	55	123	33%	23%	45%	
<i>Total</i>	<i>63</i>	<i>51</i>	<i>73</i>	<i>187</i>	<i>34%</i>	<i>27%</i>	<i>39%</i>	
<i>Q8.7. Share their travel experience with family and friends</i>								<i>Word-of- mouth</i>
Hospitality and Tourism	37	0	27	64	58%	0%	42%	
Other Sectors	67	4	52	123	54%	3%	42%	
<i>Total</i>	<i>104</i>	<i>4</i>	<i>79</i>	<i>187</i>	<i>56%</i>	<i>2%</i>	<i>42%</i>	
<i>Q8.8. Smiling face is more important than ability to solve problematic situations</i>								<i>Solve problems service importance</i>
Hospitality and Tourism	18	23	23	64	28%	36%	36%	
Other Sectors	28	53	42	123	23%	43%	34%	
<i>Total</i>	<i>46</i>	<i>76</i>	<i>65</i>	<i>187</i>	<i>25%</i>	<i>41%</i>	<i>35%</i>	


 Aligned with Literature review outcome in more than 50% of the answers.

Source: Own Elaboration

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Table 4.20: Respondents Opinion by Sector about Japanese Tourists versus Chinese Tourists preferences (Japanese customer values more than Chinese customer)

Q.9. Japanese Tourists versus Chinese Tourists	Yes	No	Not Know	Total	Yes	No	Not Know	According to the booking.com Reviews
<i>Q9.1. Hotel Decor</i>								<i>Less important for Japanese</i>
Hospitality and Tourism	24	7	33	64	38%	11%	52%	
Others	56	11	56	123	46%	9%	46%	
<i>Total</i>	<i>80</i>	<i>18</i>	<i>89</i>	<i>187</i>	<i>43%</i>	<i>10%</i>	<i>48%</i>	
<i>Q9.2. Hotel Location</i>								<i>Less important for Japanese</i>
Hospitality and Tourism	29	12	23	64	45%	19%	36%	
Others	65	10	48	123	53%	8%	39%	
<i>Total</i>	<i>94</i>	<i>22</i>	<i>71</i>	<i>187</i>	<i>50%</i>	<i>12%</i>	<i>38%</i>	
<i>Q9.3. Smiling and Enthusiastic Employees</i>								<i>Less important for Japanese</i>
Hospitality and Tourism	29	12	23	64	45%	19%	36%	
Others	51	13	59	123	41%	11%	48%	
<i>Total</i>	<i>80</i>	<i>25</i>	<i>82</i>	<i>187</i>	<i>43%</i>	<i>13%</i>	<i>44%</i>	
<i>Q9.4. Pro-active, Solving Problems Employees</i>								<i>More important for Japanese</i>
Hospitality and Tourism	45	3	16	64	70%	5%	25%	
Others	79	3	41	123	64%	2%	33%	
<i>Total</i>	<i>124</i>	<i>6</i>	<i>57</i>	<i>187</i>	<i>66%</i>	<i>3%</i>	<i>30%</i>	
<i>Q9.5. Room with Bathtub</i>								<i>More Important for Japanese</i>
Hospitality and Tourism	27	6	31	64	42%	9%	48%	
Others	34	6	83	123	28%	5%	67%	
<i>Total</i>	<i>61</i>	<i>12</i>	<i>114</i>	<i>187</i>	<i>33%</i>	<i>6%</i>	<i>61%</i>	
<i>Q9.6. Clear Procedures on how to work Room Equipment</i>								<i>More important for Japanese</i>
Hospitality and Tourism	43	4	17	64	67%	6%	27%	
Others	69	1	53	123	56%	1%	43%	
<i>Total</i>	<i>112</i>	<i>5</i>	<i>70</i>	<i>187</i>	<i>60%</i>	<i>3%</i>	<i>37%</i>	
<i>Q9.7. Price</i>				0				<i>Less important for Japanese</i>
Hospitality and Tourism	18	23	23	64	28%	36%	36%	
Others	26	34	63	123	21%	28%	51%	
<i>Total</i>	<i>44</i>	<i>57</i>	<i>86</i>	<i>187</i>	<i>24%</i>	<i>30%</i>	<i>46%</i>	

 Aligned with Literature review outcome in more than 50% of the answers

Source: Own Elaboration

4.4.2. Luxury Hotels Recruitment Policies and Hospitality Schools

The purpose of Question n° 12 in the questionnaire was to understand whether schools with hospitality programs are a good source of professionals for luxury hotels, whether they prepare the students to deal with Asian markets, and how hotels recruit according to hotel job descriptions. Comparing the results of the questionnaire with the interview results, we could confirm that there is the same tendency - Luxury Hotels do not have a specific recruitment policy to recruit staff to deal with Asian Market, and Hospitality schools do not specifically prepare professionals to deal with these markets. Hospitality schools, however, are considered good sources for recruiting professionals. According to the Hotel Top Managers interviewed, while it is essential that anyone taking on the position of Hotel Manager has hospitality experience, it is not a necessary condition for under management positions. This difference is not clear in the questionnaire, as summarised in Table 4.21. The percentage of “Don’t Know Answers” for the subject is the highest of all subjects in the questionnaire, as Figure 4.10.

Table 4.21: Responses on Recruitment Policies Hospitality and Tourism Schools in the questionnaire versus the responses of hospitality top management/experts during interviews

Questions	n	Questionnaire Mean	Std Deviation	Interview Answers
Q12.1. Luxury Hotels have a specific policy to recruit staff to be dedicated to Asian Markets	91	2.48	1.058	No
Q12.2. Hospitality and Tourism schools are a good source of professionals for luxury hotels	155	4.32	.632	Yes
Q12.3. Hospitality and Tourism schools prepare professionals to deal with Asian Markets	83	2.78	1.060	No
Q12.4. For management positions, hotel chains prefer professionals with experience in hospitality.	129	3.57	.896	Yes
Q12.5. For management positions, professionals with experience in other sectors of activity, could be an added value for the hospitality sector	152	3.86	.849	No for Hotel Manager. Yes for other positions.
Q12.6. For under management positions, hotels chains prefer professionals with experience in hospitality.	134	3.79	.814	No. Attitude is a must
Q12.7. For under management positions, professionals with experience in other sectors of activity, could be an added value for the hospitality sector	140	3.54	.970	Yes.

Note: Total N = 187. Missing = Don’t Know and Do not want to answer. Mean, Std Deviation, based on n answers within 1 to 5 Likert scale (1-totally disagree, 2-disagree, 3- not agree or disagree, agree and 5-totally agree) that means, n=Total N excluding missing.

 Alignment between questionnaire answers and interviews answers.

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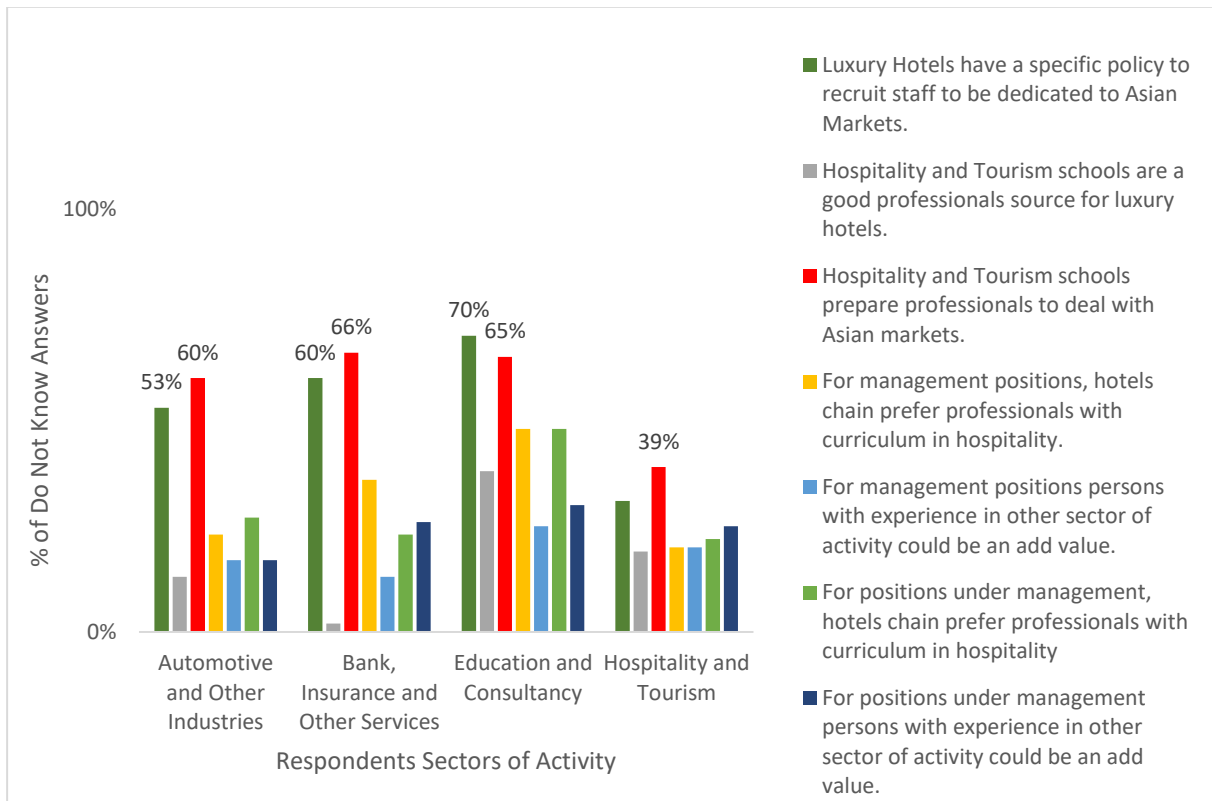


Figure n°4.10: *Luxury Hotels Recruitment Policies and Hospitality and Tourism Schools (Don't Know Answers)*

4.5. Strategy before Covid-19

The questionnaire to evaluate the strategy of Portuguese luxury hotels before covid-19 was divided into 4 parts: (I-Market (Q.6); II-Processes and Procedures (Q.10); III-People Development (Front Office (Q.11) and Training Policies (Q.13)); IV-Finance (Q.14). The descriptive analysis used the Mean and Standard Deviations. The responses to the questionnaire indicate that the Chinese and Japanese markets are important to Portugal and to Luxury Hotels. However, with regard to the Japanese and Chinese markets, the same approach (Q6.5) is taken with no differentiation being made to take into account the customer's country of origin. This question also received a significant number of "Don't Know" answers and a mean surrounding the 3.0 (2.83), a not agree or disagree answer, same for Q10.3 with room attribution. Questions related to service differentiation taking in consideration the customer country of origin are classified between 2.5 and 3.5 (marked in blue in Table 4.22), suggesting that there is no clear opinion about the importance of taking in consideration the country of origin of the customer. Analysis of the Literature Review shows this can be a problem because there is a diversity among the Asian customers that should most definitely be taken in consideration in the approach to market and customer.


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Complimentary gifts (Q10.5), an Emergency Direct Line (Q10.7) in the room and Asian Market Profitability (Q14.1, Q14.2, Q14.3) are some of the questions where the number of “Don’t Know” answers is also significantly high, as detailed in Table 4.22. Questions Q.13 concerning training in Asian, Japanese and Chinese culture is considered important but in fact, according with interviews outputs, the hotels are not doing it.

Table 4.22: Descriptive Statistics of Strategy Before Covid-19

Questions	n	Mean	Std Deviation
Q6.1. Asian Market was important to Portugal	170	4.22	.725
Q6.2. Asian Market was important to Luxury Hotels	167	4.20	.749
Q6.3. Chinese Market was important to Luxury Hotels	163	4.07	.852
Q6.4. Japanese Market was important to Luxury Hotels	157	3.97	.824
Q6.5. Luxury Hotels have equal approach to Chinese and Japanese Market	111	2.83	1.078
Q10.1. Standard procedures regardless of customer country of origin	171	3.08	1.411
Q10.2. Breakfast should include vegetables and Asian food	166	3.78	1.023
Q10.3. Room attribution standard regardless of customer country of origin	164	3.03	1.169
Q10.4. All luxury hotels rooms should have a kettle	166	4.10	.788
Q10.5. Courtesy gifts, (water, slippers) are important to Chinese and Japanese customers	125	4.14	.800
Q10.6. Verify before check-in whether room equipment is working well	173	4.65	.588
Q10.7. Emergency Direct Line in the room	103	4.11	.779
Q10.8. Clear instructions on how to work with room equipment at check-in	168	4.17	.797
Q11.1. Attending to customers is the same for all customers	161	3.39	1.195
Q11.2. Room customer attribution is standard and random	152	2.72	1.064
Q11.3. In case of check-in delays, staff apologise and offer welcome drink or other compensation	147	3.74	.951
Q11.4. Staff have information to advise customers concerning restaurants, shops, and transport nearby	163	4.08	.762
Q11.5. Staff have a proactive reaction to solving problematic situations	165	4.04	.764
Q11.6. Staff have a happy and sincere smile	163	3.99	.782
Q13.1. Staff should be trained in Asian Culture	158	3.82	.794
Q13.2. Staff should be trained in Chinese Culture	155	3.70	.862
Q13.3. Staff should be trained in Japanese Culture	158	3.70	.878
Q13.4. Training standard for front-office attendance regardless customer country of origin	164	2.97	1.169
Q13.5. Hotels should have a continuous improvement policy	167	4.56	.533
Q13.6. Staff should be able to propose improvements	168	4.54	.546
Q13.7. Hotels should have a continuous improvement department	166	4.47	.513
Q14.1. Asian Market was profitable	133	4.12	.652
Q14.2. Chinese Market was profitable	132	4.00	.699
Q14.3. Japanese Market was profitable	126	4.06	.719

Note: Total N = 187. Missing = Don’t Know and Do not want to answer. Mean, Std Deviation, based on n answers within 1 to 5 Likert scale (1-totally disagree, 2-disagree, 3- not agree or disagree, agree and 5-totally agree) that means, n=Total N excluding missing.

 Questions with answers with mean between 2.5 and 3.5 (surrounding the Not Agree or Disagree Answer).

4.5.1. The Dimensions of Strategy before Covid-19

The questionnaire to evaluate Portuguese luxury hotel strategy before covid-19 was divided into 4 parts: (I-Market (Q.6); II-Processes and Procedures (Q.10); III-People Development (Front Office (Q.11) and Training Policies (Q.13)); IV-Finance (Q.14). Questions Q10.1, Q10.3 and Q13.4 are transversal to the four parts and related to hotels' standard general processes regardless the customer country of origin. These four parts were used as strategy before covid-19 dimensions and calculate the CITC and Cronbach's Alpha as detailed in Table 4.23. Only variables with values of CITC higher than 0.5 were kept for further analysis. So, variables Q6.5, Q10.6, Q11.1, Q11.2 and Q11.3 were excluded.

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Table 4.23: Reliability Analysis of the Variables – Strategy before Covid-19

Item	Questions	CITCs	Alpha if Item Deleted	Cronbach Alpha
1	Q6.1	0.799	0.668	0.745
2	Q6.2	0.827	0.666	
3	Q6.3	0.792	0.670	
4	Q6.4	0.743	0.689	
5	Q6.5	0.260	0.803	
6	Q10.2	0.518	0.823	0.824
7	Q10.4	0.640	0.787	
8	Q10.5	0.656	0.784	
9	Q10.6	0.507	0.815	
10	Q10.7	0.655	0.783	
11	Q10.8	0.641	0.786	
12	Q11.1	0.383	0.598	0.640
13	Q11.2	0.091	0.708	
14	Q11.3	0.336	0.610	
15	Q11.4	0.540	0.578	
16	Q11.5	0.575	0.532	
17	Q11.6	0.551	0.538	
18	Q13.1	0.861	0.980	0.960
19	Q13.2	0.944	0.918	
20	Q13.3	0.945	0.918	
21	Q13.5	0.662	0.757	0.817
22	Q13.6	0.659	0.761	
23	Q13.7	0.690	0.730	
24	Q14.1	0.906	0.783	0.887
25	Q14.2	0.844	0.860	
26	Q14.3	0.860	0.877	
27	Q10.1	0.605	0.575	0.725
28	Q10.3	0.449	0.745	
29	Q13.4	0.619	0.553	

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The Principal Components Analysis (statistic instrument) was used to reduce the variables used by transforming a large set of variables into a smaller one that nevertheless contains most of the information in the large set and find out the underlying dimensions.

Using the Kaiser-Meyer-Olkin test for a total of 24 variables (KMO=0.756) from an initial total of 29 variables (5 were removed because of CITC below 0.5). With the significance level of the Bartlett test being 0.000, we can conclude that the correlation matrix is not an identity matrix. Cronbach's Alpha verifies the internal consistency of the components (George and Mallery, 2003). Using the Varimax method to rotate the principal components, allowed for an easier interpretation to analyse the principal components, and the most significant variable weight, can easily be seen, as in table 4.23. All variables have loadings above 0.5 except Q10.6 that has 0.469, in rounded figures 0.5 and for that reason it was decided to keep it in the model. Afterward with SEM, it had been confirmed the relevance of the variable for the model and the variable was kept.

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Table 4.24: Principal Components Analyses

	Loadings	% Variance Explained	Cronbach Alpha
Component 1- Asian Culture Training Q13.1. Staff should be trained in Asiatic Culture Q13.2 Staff should be trained in Chinese Culture Q13.3 Staff should be trained in Japanese Culture	0.885 0.935 0.941	11.5	0.960
Component 2: Asian Market Importance Q6.1. Asian Market was important to Portugal Q6.2. Asian Market was important to Luxury Hotels operating in Portugal Q6.3. Chinese Market was important to Luxury Hotels operating in Portugal Q6.4. Japanese Market was important to Luxury Hotels operating in Portugal	0.810 0.834 0.788 0.747	11.4	0.832
Component 3: Front-Office Competences Q11.4 Staff have information to advise customers concerning restaurants, shops, and transport nearby. Q11.5 Staff have a proactive reaction to solving problematic situations Q11.6 Staff have a happy and sincere smile	0.779 0.911 0.871	10.6	0.844
Component 4: Profitability Q14.1 Asian Market was profitable Q14.2 Chinese Market was profitable Q14.3 Japanese Market was profitable	0.906 0.854 0.859	10.4	0.887
Component 5: General Procedures Q10.2 Breakfast should include vegetables and Asian food Q10.4 All luxury hotels rooms should have a kettle Q10.5 Courtesy gifts (water, slippers) and amenities are important to Chinese and Japanese customers Q10.6 Verify before check-in whether room equipment is working well Q10.7 Emergency Direct Line Q10.8 Clear instructions on how to work with room equipment at check-in	0.531 0.633 0.590 0.469 0.756 0.678	10.1	0.824
Component 6: Continuous Improvement Q13.5 Hotels should have a continuous improvement policy Q13.6 Staff should be able to propose improvements Q13.7 Hotels should have a continuous improvement department	0.826 0.815 0.856	9.7	0.817
Component 7: Procedures / Customer Q10.1 Standard procedures regardless of customers' country of origin Q13.4 Training Standard in Front-Office Attendance regardless customer country of origin	0.857 0.852	7.1	0.745

4.5.2. Strategy dimensions according to sector of activity

Using the Levene test, the homogeneity of the variances within the components and for all sectors of activity are confirmed if $\text{sig} > .05$. The equality of sector means will be confirmed through ANOVA with a $\text{sig} > .05$. If the assumption of homogeneity of variances is confirmed but the equal means condition is not, a Scheffe post hoc test will be used to do a mean multiple comparison test. If the assumption of equal population variances is violated, the Dunnett's C post-hoc test will be used, as summarised in table 4.25.

Table 4.25: Sector Components Homogeneity of Variances and Equal Means

Components	N	Levene Test Statistic	Sig	ANOVA F	Sig	Post Hoc Test
Market-Asian Market Importance	187	.629	.597	.675	.569	
People 1-Asian Cultural Training	187	.912	.436	1.169	.323	
People 2 – Front Office Competences	187	.158	.924	1.624	.185	
People 3 – Continuous Improvement	187	.475	.700	5.522	.001	Scheffe
PP1-General Procedures	187	4.090	.008	.027	.994	
PP2-Procedures/Customer	187	.477	.699	2.688	.048	Scheffe
Finance-Profitability	187	1.266	.288	4.151	.007	Scheffe

The dimensions Market (Asian Market Importance), People 1 (Asian Cultural Training), People 2 (Front-Office Competences) confirmed the homogeneity of variances and equal means across the sectors of activity, so there are no significant differences between the means. For components People 3 (Continuous Improvement), PP2 (Procedures/Customer) and Finance (Profitability), the Scheffe multiple comparison test was used to identify the groups with different means.

After the Post Hoc Test, the following results were achieved, as shown in table 4.26.

Table 4.26: Post-Hoc Tests Results Summary

Components	Existence of significant mean differences
People3	Bank, Insurance and Other Services versus Education and Consultancy
PP2	Hospitality and Tourism versus Automotive and Other Industries
Finance	Hospitality and Tourism versus Automotive and Other Industries

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For component People3, Bank, Insurance and Other services and Education and Consultancy, significant differences were found, as shown in Figure 4.11.

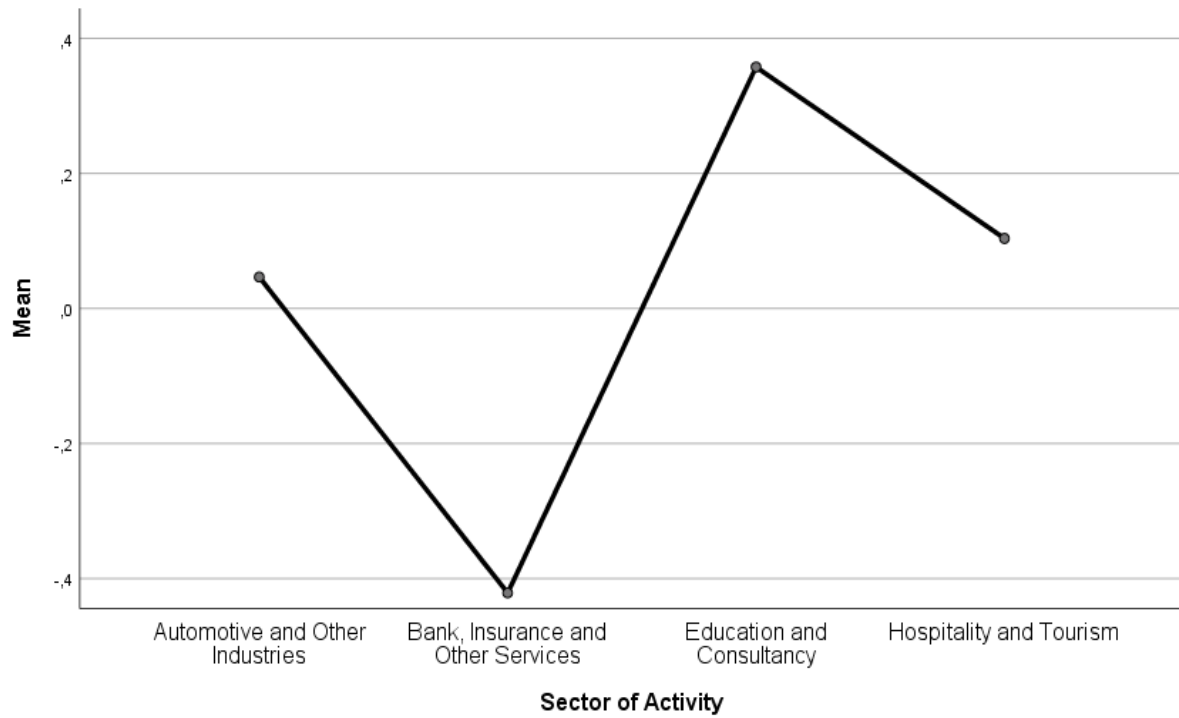


Figure 4.11: Comparison of Means by sectors of activity for Component People3 (Continuous Improvement)

Continuous improvement actions are seen to be much more important by the education and consultancy sectors than by the bank, insurance, and other services sectors.

For the components PP2 and Finance, there are significant differences between the Automotive and other industries and the Hospitality and Tourism sectors, as shown in Figure 4.12. (PP2) and Figure 4.13. (Finance).

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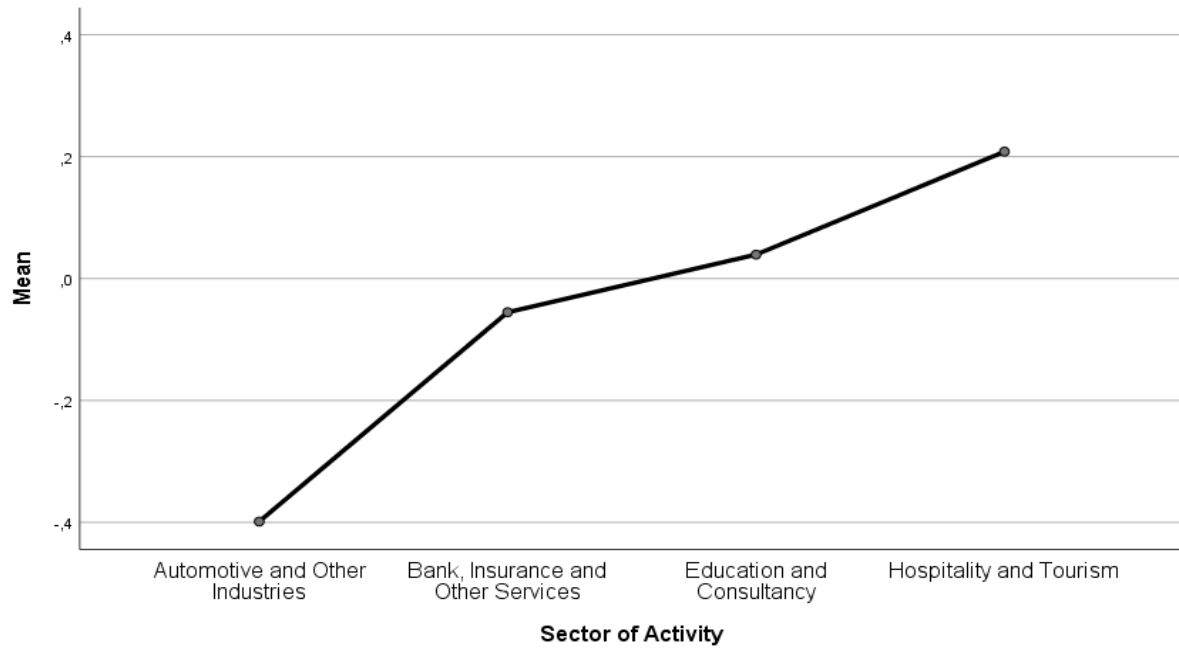


Figure 4.12: Comparison of Means by sectors of activity for Component PP2 (Procedures/Customer)

This component concerns the importance of procedures and processes taking into consideration the customers' country of origin to provide a service that is adequate to their culture and needs. The automotive sample includes professionals working in Japanese companies, who are better able to understand the unique Japanese culture. This may be one of the reasons for this difference. The Hospitality and tourism sector practises a standard service and applies processes and procedures regardless of customers' country of origin. The Automotive sector, represented by professionals working in Japanese companies, should have a greater understanding of these customers' cultural differences and, therefore, should be better able to understand their needs.

Finance is a component where the mean differences between the automotive and other industries sector and hospitality and tourism sector are significant, as represented in figure 4.13.

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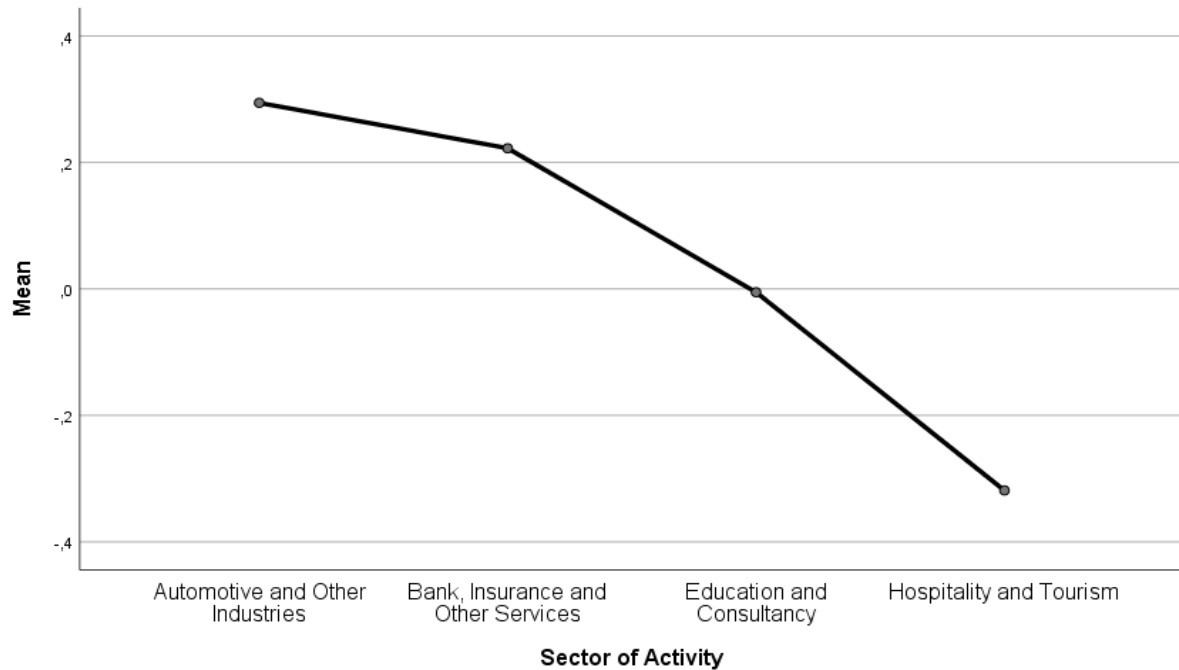


Figure 4.13: *Comparison of Means by sectors of activity for Component Finance-Profitability*

Japanese companies are known for being very profitable, and Japanese customers are renowned for having high acquisition power. According to the feedback collected from the hospitality top managers, Japanese customers are hard to understand and are a distance market difficult to attract, which is why they prefer to win markets closer to European markets in both culture and distance. Maybe for that reason, the perspective of these sectors has significant mean differences.

4.5.3. Theoretical Model and Hypotheses

A theoretical model can be proposed, using seven hypotheses based in the literature review, online booking.com reviews and interviews outcome, as summarized in Figure 4.14 as follows:

- H1: Strategy can be explained by the latent variable Market.
- H2: Strategy can be explained by the latent variable People1.
- H3: Strategy can be explained by the latent variable People2.
- H4: Strategy can be explained by the latent variable People3.
- H5: Strategy can be explained by the latent variable PP1.
- H6: Strategy can be explained by the latent variable PP2.
- H7: Strategy can be explained by the latent variable Finance.

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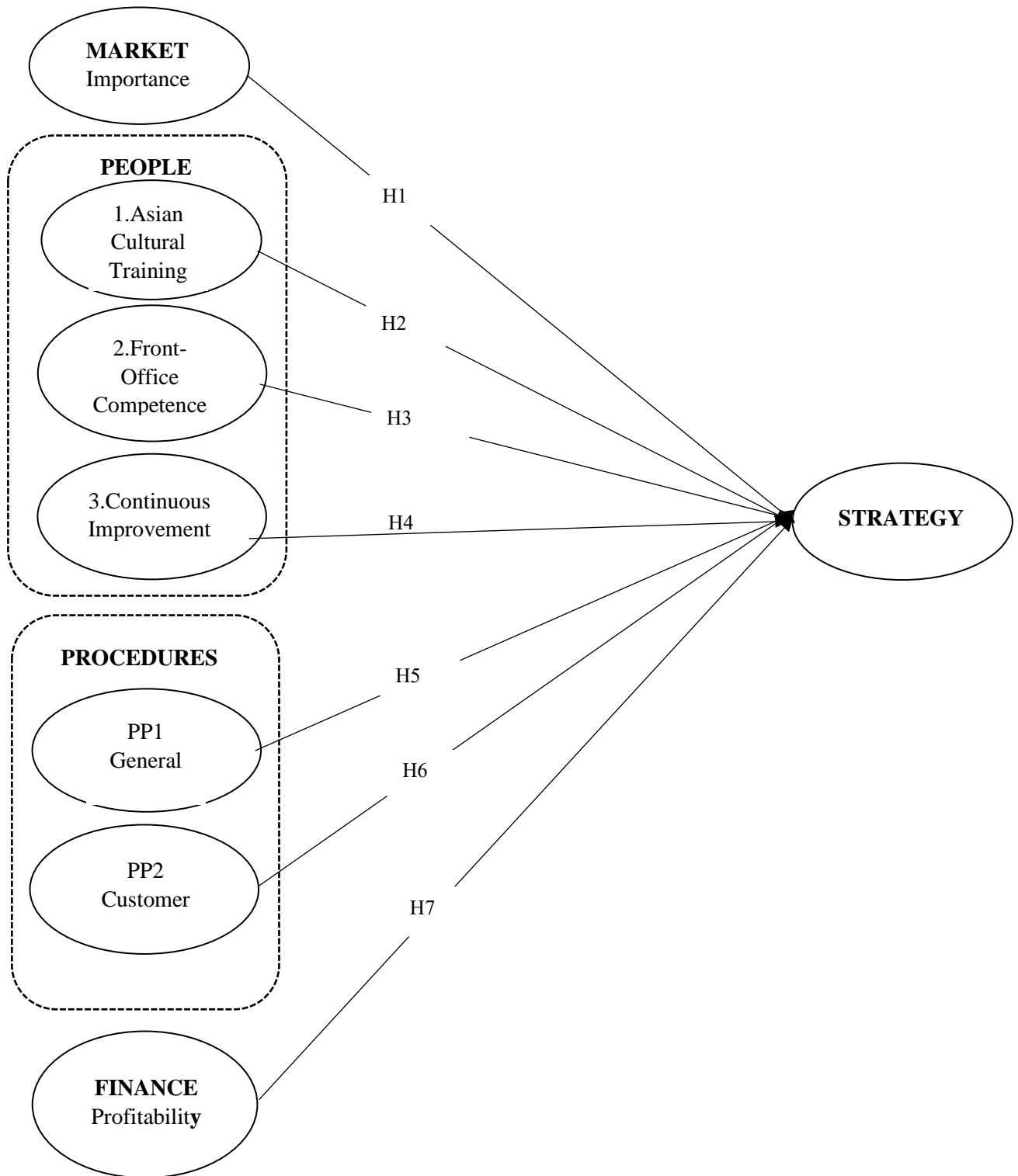


Figure 4.14: Theoretical Model and Hypotheses

Source: Own Elaboration

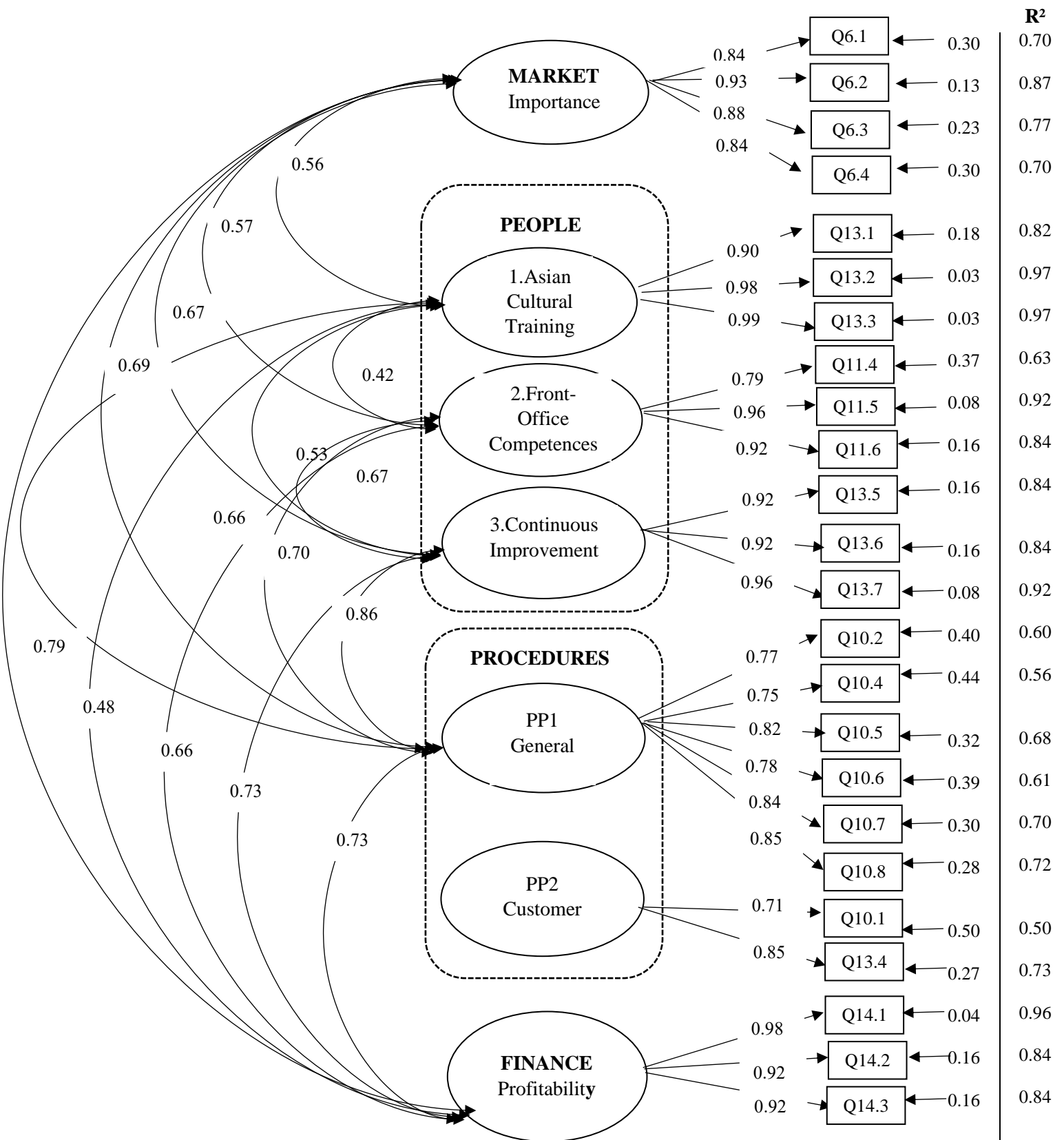
4.6. An Exploratory Model for Strategy before Covid-19 based on PCA results

4.6.1. The Measurement Model

In the main, the Amos26 (SPSS) output of Chi-Square, RMSEA, CFI, TLI and PCFI were used to evaluate the Model Fit for the seven dimensions: Market (Asian Market Importance), People1 (Asian Market Training); People2 (Front Office Competences); People3 (Continuous Improvement), PP1(General Procedures); PP2 (Procedures-Customer) and Finance (Profitability). An **RMSEA** (Root Mean Square Error of Approximation) below 0.08 shows a good fit (MacCallum et al, 1996), in our research it is 0.078. Other model evaluators such as, the **CFI** (Comparative Fix Index), **TLI** (Tucker-Lewis Index) and **PCFI** were used to evaluate the overall model fit. All these indicators can be sensitive to small samples (N) or models with few free degrees (Marôco, 2021). In the following pages, the Amos Output for each component is presented as well as a summary of the overall model fit.

The Squared multiple correlation (R^2) is called the coefficient of determination and is defined as the proportion of the total variation of each observed variables explained by the respective latent variable.

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$\chi^2 = 518.486$, $df = 244$, $p\text{-value} = 0.000$; $RMSEA = 0.078$; $CFI=0.853$; $TLI=0.820$; $PCFI= 0.694$.

$p < .001$ for all observed variables coefficients

All variables can be consulted at Table 4.27 below

Figure 4.15. Measurement Model

Table 4.27: Latent Dimensions and Observed Variables of the Measurement Model

Market Importance
 Q6.1. Asian Market was important to Portugal
 Q6.2. Asian Market was important to Luxury Hotels operating in Portugal
 Q6.3. Chinese Market was important to Luxury Hotels operating in Portugal
 Q6.4. Japanese Market was important to Luxury Hotels operating in Portugal

People1: Asian Cultural Training
 Q13.1. Staff should be trained in Asiatic Culture
 Q13.2 Staff should be trained in Chinese Culture
 Q13.3 Staff should be trained in Japanese Culture

People2: Front-Office Competences
 Q11.4 Staff have information to advise customers concerning restaurants, shops, and transport nearby
 Q11.5 Staff have proactive reaction to solve problematic situations
 Q11.6 Staff have a happy and sincere smile

People3: Continuous Improvement
 Q13.5 Should have a continuous improvement policy
 Q13.6 Staff should be able to propose improvements
 Q13.7 Should have a continuous improvement department

PP1: General Procedures
 Q10.2 Breakfast should include vegetables and Asian food
 Q10.4 All luxury hotels rooms should have a kettle in the room
 Q10.5 Courtesy gifts and amenities (water, slippers) are important to Chinese and Japanese customers
 Q10.6 Verify before check-in whether room equipment is working well
 Q10.7 Emergency Direct Line
 Q10.8 Clear instruction on how to work with room equipment at check-in

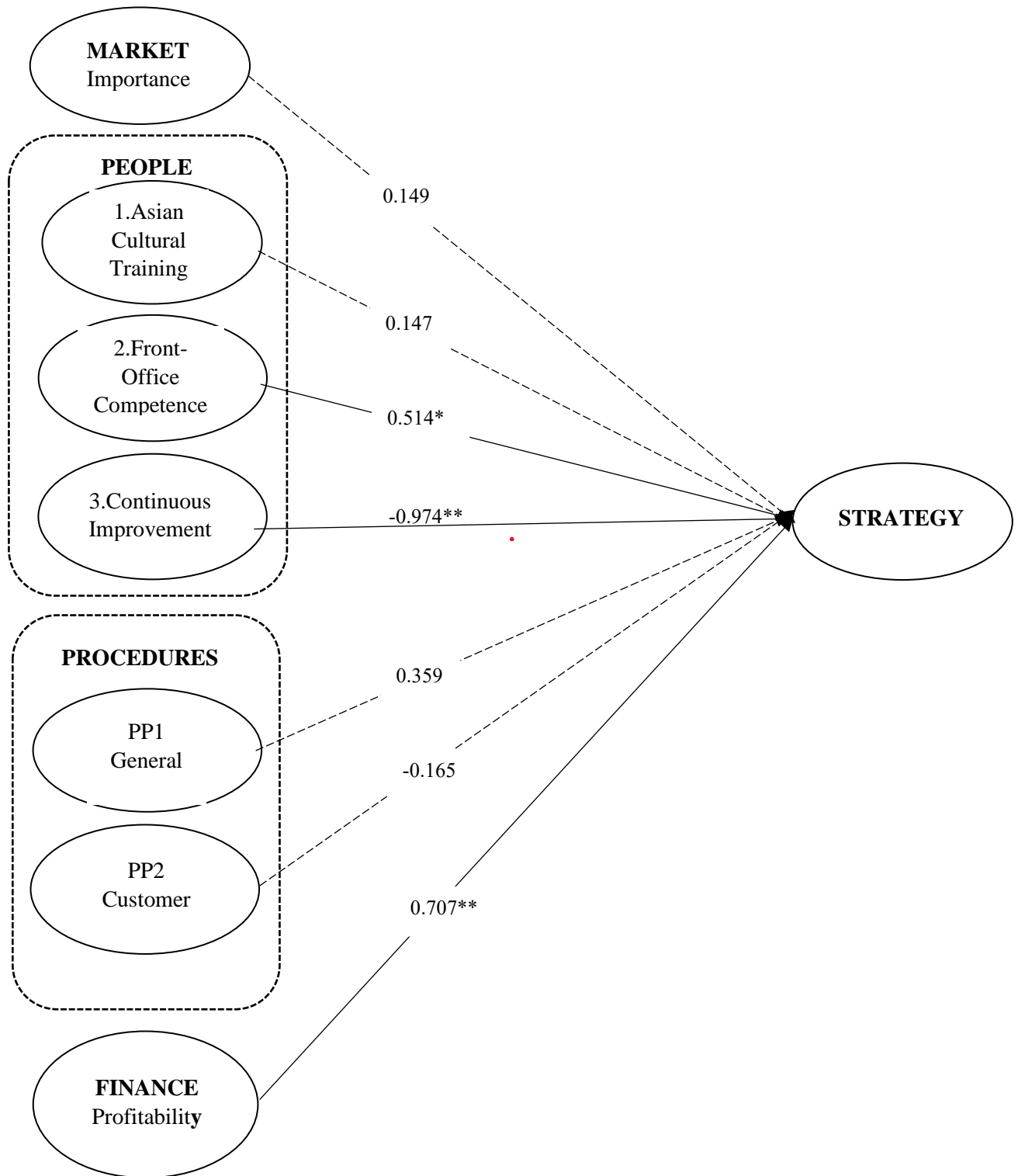
PP2: Procedures / Customer
 Q10.1 Standard procedures regardless of customers' country of origin
 Q13.4 Training Standard in Front-Office Attendance regardless of customers 'country of origin

Finance: Profitability
 Q14.1 Asian Market was profitable
 Q14.2 Chinese Market was profitable
 Q14.3 Japanese Market was profitable

4.6.2. Structural Equation Modelling (SEM)

The theoretical model comprises seven latent variables, namely Market (Importance), People1(Asian Training), People2 (Front Office Competences), People3 (Continuous Improvement), PP1 (General Procedures), PP2 (Procedures/Customer) and Finance (Profitability). Strategy is assumed as a dependent variable and all the others are assumed as independent variables. Figure 4.16. presents the theoretical model and the seven proposed hypotheses to be tested, which are represented by the cause-effect relationships.

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$\chi^2 = 605.995$, $df = 284$, $p\text{-value} = 0.000$; $RMSEA = 0.078$; $CFI=0.840$; $TLI=0.803$; $PCFI=0.680$
 ** $p < .05$, * $p < .10$

Figure 4.16: Model Estimation using Structural Equation Modelling (SEM)

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Strategy can be explained by the latent variables: Finance, People2 and People3, these results are shown in Fig. 4.16. Confirming the interviews and questionnaires results concerning strategy as Table 4.28.

Table 4.28: Impact of Strategic Dimensions (Independent Variables) on Hotels Strategy before COVID19 (Dependent Variable)

Components	Interviews and Questionnaire (Strategy Before Covid-19)
Market (Importance)	Asian, Chinese and Japanese Markets are considered important; however, Hotels Management are depending on Portuguese Tourism Office (TP) initiatives to approach the Asian Markets. The Japanese Market is not a priority to TP. No long-term strategy in place. To Hotels Management, Markets closer to Portugal in distance and culturally are easier and quicker to conquest. There is no significant effect on the strategy before COVID19.
Asian Cultural Training	Asian cultural Training is considered important, however no Asian Cultural Training Plan was part of the hotels ‘strategy before covid-19. There is no significant effect on the strategy before COVID19.
Front-Office Competences*	Front-office with a happy and sincere smile, prepared to advise customers about restaurants, shops and transports and solve problematic problems are generally appreciated, also appreciated by the Asian Customers. So, it was included in hotels strategy, even if not taking in consideration customer country of origin. There is a significant and moderate positive effect on the strategy before COVID19.
Continuous Improvement**	Hotels Management consider continuous improvement very important, but all actions are dedicated taking in consideration the western culture or similar. So, the improvements are creating a larger gap with the culture of Asian customers. This variable has a strong but negative proportional effect on the strategy to retain and attract Asian customers.
General Procedures	There are in place general standard procedures (many Japanese negative booking.com comments related to these procedures). Resulting on a non-significant effect in the dependent variable strategy.
Procedures Customer	There are in place standard procedures regardless customer country of origin. These procedures mainly take in consideration Western culture or similar. There is no significant effect on the strategy before COVID19.
Finance Profitability**	Hotels Management take in consideration Profitability to decide investing in a market or not. As much as a market is seen as profitable, as much will be the focus of investment. The Asian Market was seen as profitable. There is a significant strong positive effect on the strategy before COVID19.

Significant: **p < .05, *p < .10

In summary, the hotels management (before covid-19) do not have a long-term strategy to retain and attract Asian Customers (Japanese and Chinese). The component Finance-Profitability had impact in the strategy decision however, Asian Markets imply long-term investment return. The components People2 (Front-Office Competences) have positive impact in the Strategy and People3 (Continuous Improvement), as much Hotels management improve only taking in consideration the western culture or similar, bigger will be the gap to the Asian customers preferences and service expectations. To retain and conquest Japanese customers is very important to delight them through an outstanding service. Travel decisions are made collectively and taking in consideration friends and family experiences shared through “word to mouth”. So, understanding the Japanese customers and align the hotels attributes with their expectations would be a not expensive way of retaining and attracting Japanese tourists, well known for being respectful and big tourist spenders but, of course it is a long-term strategy aligned with the Japanese management and philosophy of life: Think big, start small.

4.7. Model Validity

The validity of a measurement instrument denotes the degree to which it is well organised and corresponds exactly to the real-world situation. In other words, it refers to how accurately it stands for what it aims to measure. The construct validity (including convergent validity and discriminant validity) was presented.

Construct Validity

Construct validity shows the extent to which a theoretical construct can be measured by the operationalisation of a construct and is proven by empirical and theoretical evidence for the explanation of the actual construct. Under Construct Validity, there is Convergent Validity (Table 4.29) and Discriminant Validity (Table 4.30). The former means the measure is related to ideas that it should be associated with, and the latter denotes that the scale is not connected to ideas it should not be linked with (Anastasi & Urbina, 1997).

Convergent Validity

Convergent validity was determined by examining: 1) the Standardised Factor Loading (SFL); 2) the Average Variance Extracted (AVE) for each dimension; 3) the Composite Reliability (Raykov, 1997). Table 4.29 reports the relevant figures, and the scale was thus considered to

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possess satisfactory convergent validity, all AVE values are above 0.50 (Hair et al., 2019, p.676).

Table 4.29: Convergent Validity of Variables

PC	Variables	SFL	EV	AVE	CR
Market	Q6.1	0.836	0.299	0.760	0.927
	Q6.2	0.934	0.130		
	Q6.3	0.877	0.231		
	Q6.4	0.837	0.299		
People1	Q13.1	0.904	0.185	0.920	0.972
	Q13.2	0.985	0.030		
	Q13.3	0.987	0.026		
People2	Q11.4	0.788	0.374	0.795	0.920
	Q11.5	0.962	0.082		
	Q11.6	0.916	0.159		
People3	Q13.5	0.916	0.157	0.865	0.951
	Q13.6	0.914	0.163		
	Q13.7	0.958	0.084		
PP1	Q10.2	0.770	0.406	0.641	0.914
	Q10.4	0.748	0.445		
	Q10.5	0.821	0.328		
	Q10.6	0.784	0.388		
	Q10.7	0.832	0.303		
	Q10.8	0.846	0.284		
PP2	Q10.1	0.697	0.514	0.613	0.758
	Q13.4	0.860	0.260		
Finance	Q14.1	0.978	0.042	0.881	0.957
	Q14.2	0.919	0.157		
	Q14.3	0.918	0.157		

Note: PC = Principal Component; SFL = Standardised Factor Loading; EV = Error Variance; AVE = Average Variance Extracted; CR = Composite Reliability

Discriminant Validity

Discriminant Validity was tested using Fornell & Larcker (1981) criteria, which compares the square roots of the AVE of every dimension with the absolute values of their correlation coefficients with other dimensions. The square roots of the AVE, and main diagonal of the correlation matrix, being higher than the absolute values of their correlation coefficients with other dimensions, confirmed satisfactory discriminant validity, as shown in Table 4.30.

Table 4.30: *Discriminant Validity of Variables in the Theoretical Model*

	Market	PP1	PP2	People1	People2	People3	Finance
Finance							0.939
People3						0.930	0.713
People2					0.892	0.674	0.662
People1				0.959	0.417	0.526	0.475
PP2			0.784	0.325	0.058	0.153	0.041
PP1		0.801	0.265	0.664	0.697	0.863	0.732
Market	0.872	0.694	0.568	0.560	0.569	0.669	0.786

4.8. Results and Discussion - Strategy After Covid-19

The Asian, Chinese, and Japanese Markets are going to be profitable, so a dedicated strategy for Asian Markets should be implemented. However, the first market to be developed will be the European one, followed by the markets of Brazil and the USA. Training and people development will be the priority within the balanced scorecard dimensions (Market, Processes and Procedures, People and Finance). Detailed as follows:

4.8.1. Priority markets - Profitability

Before Covid-19, the Asian markets had been seen as profitable, even though the focus was on the Chinese Market. With regard to After-Covid, the feedback received through the questionnaires was that all sectors considered that the Asian Market should be profitable and deemed the Japanese market more profitable than the Chinese market. Figure 4.25 shows a comparison of the answers (means) of the different sectors of activity related to Market profitability (Asian, Chinese, and Japanese). The questionnaire used a Likert scale 1 to 5 (1- Completely disagree, 5-Completely Agree). Question (Q.15) was the following: Will the markets (Asian, Chinese, and Japanese) be profitable for luxury hotels operating in Portugal, after covid-19?

All sectors of activity considered that the Japanese market will be more profitable than the Chinese market. However, the hospitality sector classified the profitability of the Asian, Japanese and Chinese more conservatively, with average means lower than for the other sectors of activity, as in figure 4.25.

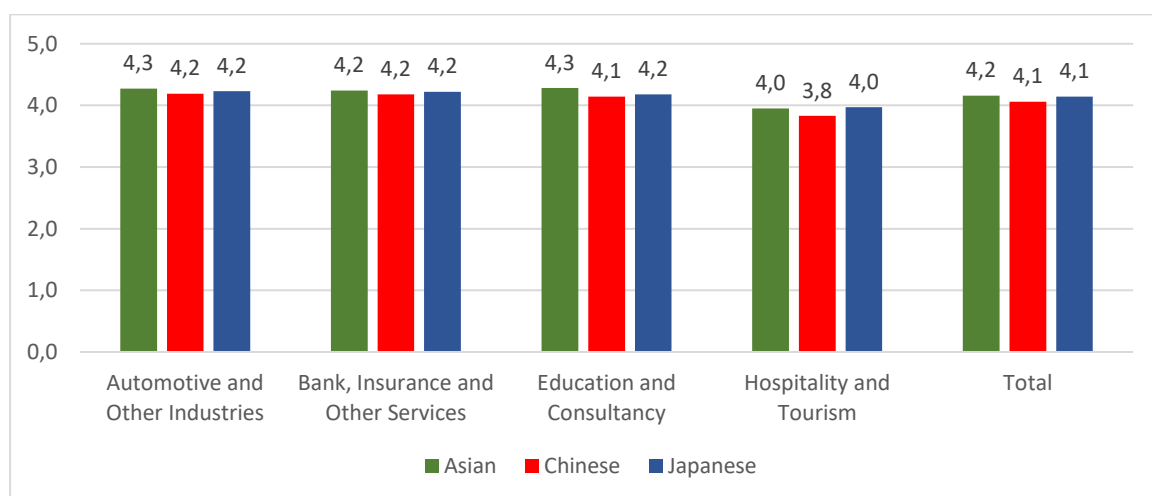


Figure 4.17: *Markets Profitability Expectations After Covid-19 by Sector*

Source: Own Elaboration

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4.8.2. Priority Balanced Scorecard Dimensions

Testing the after-covid strategy concerning priorities and using the variables: Image and Decor (Features), Training and People Development, Marketing and Customer Research, Processes and Procedures and Profitability. Table 4.31 reflects the results (1-the highest priority, 5-the lowest priority)

Table 4.31: Questionnaire Results for Strategy Priority after COVID-19 (Means)

Sector		Image and Decoration (Features)	Training and People Development	Marketing and Customer Research	Processes and Procedures	Profitability
Automotive and Other Industries	Mean	3.74	1.96	2.26	3.26	3.78
Banking, Insurance and Other Services	Mean	4.07	2.21	2.26	2.74	3.71
Education and Consultancy	Mean	3.81	2.48	2.19	2.74	3.78
Hospitality, Tourism	Mean	4.36	2.15	2,31	3,03	3,15
Total		4.05	2,21	2,26	2,92	3,57

Source: Own Elaboration based on SPSS26 output

Training and People Development is the top priority after COVID-19, which is in line with the literature review concerning the Asian markets. The main focus should be on cultural awareness training. Marketing and Customer Research comes in second place, followed by Processes and Procedures, and Profitability, with Image and Decor coming last (the trend was the same for all sectors and the Hospitality and Tourism sector).

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Finance being in the last position is in line with the results of the Top Management interviews. The first positions have dual opinions, between Training and People Development and Marketing and Customer Research.

4.8.3. Priority Markets

With regard to which countries to prioritise (Questionnaire question, Q18), on the whole there was consensus that put European markets in first place. The main reasons for this are: proximity, being a well-known market, and good flight connections. Brazil came second and the USA third, as these, too, have good flight connections and a rich “saudade/nostalgia” market to mine, being countries where Portuguese emigrants live and work. See Table 4.32 (1- the highest priority, ..., 9-the lowest priority).

Table 4.32: Questionnaire Results for Market Development Priority after COVID-19

Sector		Australia	Brazil	Canada	China	USA	Japan	African Countries	Europe	Others
Automotive and Other Industries	Mean	6.29	4.07	5.57	3.61	4.00	3.46	7.11	2.32	8.57
Banking, Insurance and Other Services	Mean	5.88	3.81	5.44	3.79	4.35	3.85	6.85	2.40	8.63
Education and Consultancy	Mean	5.59	3.69	5.59	3.63	4.59	4.16	6.63	2.44	8.69
Hospitality, Tourism	Mean	5.79	3.50	4.42	4.98	2.75	5.40	7.21	2.60	8.35
Total	Mean	5.87	3.74	5.18	4.09	3.85	4.32	6.96	2.46	8.54

Source: Own Elaboration based on SPSS26 output

Concerning Hospitality and Tourism, priority is clearly given to the European and USA markets. The Asian Markets (Japan and China) are not top priorities, confirming the results of the interviews with hospitality management and experts.

4.9. The Improved Research Model

After reviewing the Literature, and from the comments made on booking.com by Japanese and Chinese tourists, the following customer characteristics were found for the Market/Customer Dimension: Travel Type (Business or Leisure); Visit Type (Couple, Family, Group or Individual); Number of Overnight stays; and Hotel rating differences: 5 stars versus 4 stars hotels; and Traditional Chain Hotels versus Boutique and Independent Chain Hotels. The most important hotel attributes for the Japanese and Chinese were identified and grouped in six main categories: 1. Location, 2. Facilities, 3. Room, 4. Breakfast, 5. Staff and 6. Price. With regard to the Portuguese Hospitality Dimension, the fit of hotel attributes necessary for dealing with the Asian market in general, and the Japanese and Chinese markets in particular, was obtained through interviewing hospitality top managers and experts, and the results of a questionnaire given to management of several sectors of activity including hospitality and tourism. The characteristics of the respondents were obtained (Sector, Age, Gender, Job Description, and knowledge about the subject) and feedback about Luxury hotel strategy before and after covid was understood. In the end, it was possible to draw conclusions about the gaps between the two dimensions (Market/Customer versus Portuguese Hospitality) and propose the improved model for luxury hotels to meet Japanese customers' expectations with regard to hotel attributes as classified by the balanced scorecard dimensions (Customer, Processes, People and Finance) and an additional one, Features, as shown in Figure 4.18. (words written in black are related to the model presented at the end of chapter 2 (Figure 2.6) and words written in blue are related to improvements made in the model).

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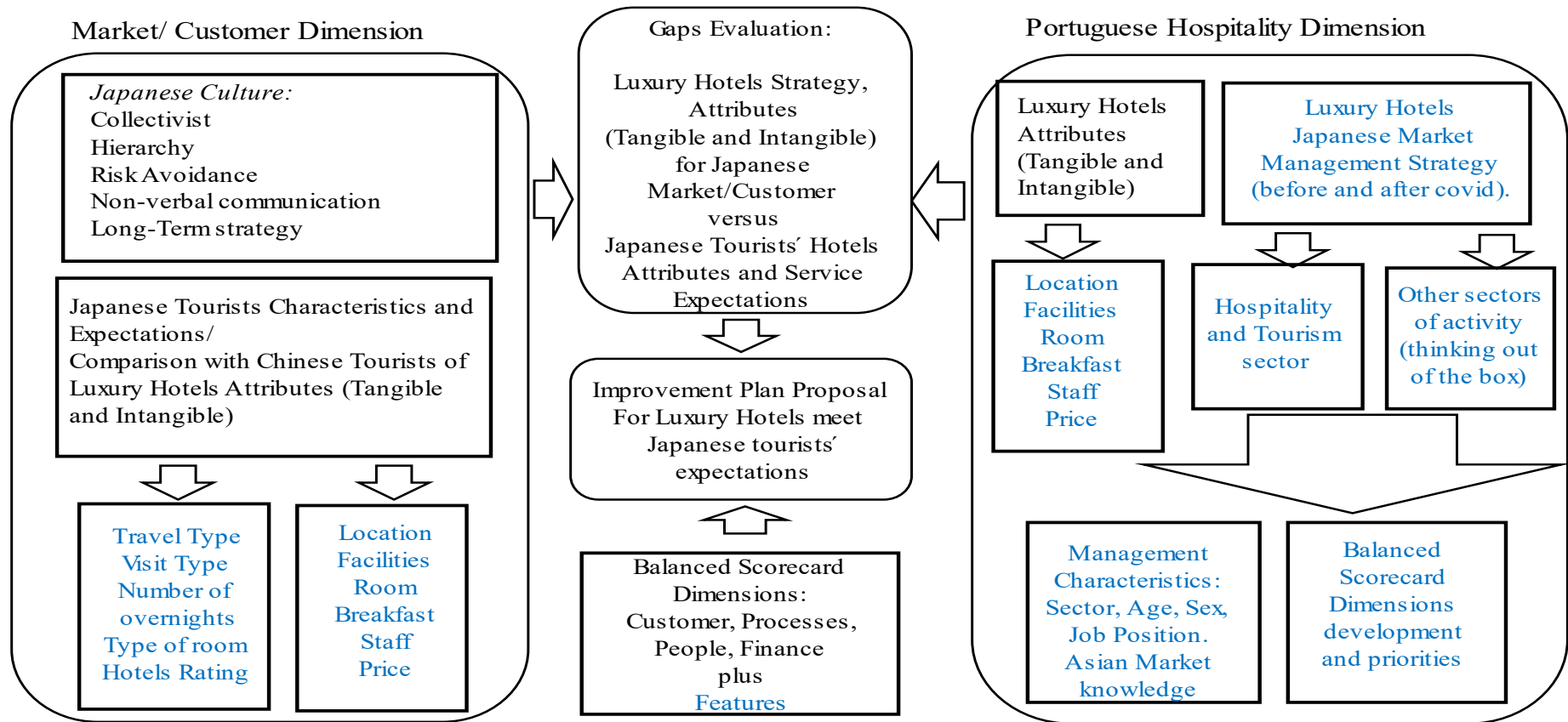


Figure 4.18: Improved Research Model

Source: Own Elaboration

Chapter 5. Discussion, Conclusions and Limitations

5.1. Overview

This chapter discusses and summarizes the research results, including the study's originality and value, research conclusions, theoretical contribution, research significance, research limitations, and topics for future research.

5.2. Originality and Value

This study is relevant because little research is currently being done concerning Portugal's Income from Japanese tourists, despite the fact that Japanese tourists are known to be among the most respectful tourists and the best spenders worldwide. In Portugal, there is no history of consistent growth in Japanese tourism. The study contributes to our understanding of why this might be so, and towards developing future strategies to achieve sustainable business growth by attracting Japanese tourists to Portugal and retaining them. It also highlights some differences between Japanese and Chinese tourists.

5.3. Research Discussion

From a review of the literature, a strategic tool common to Hilton (the most valuable hospitality company in the world) and Toyota (the most valuable Japanese company in the world) was found; this tool is the balanced scorecard. For that reason, our analysis was carried out based on the four dimensions of the balanced scorecard: Market/Customer, Processes and Procedures, People and Finance.

The study used literature review, analyses of Japanese and Chinese reviews on booking.com, interviews, and questionnaires to answer four specific questions to resolve our particular research issue. Details can be found in points 5.5.1, 5.5.2., 5.5.3. and 5.5.4. below.

The main objective was to reach a better understanding of Japanese tourists' culture and expectations in order to contribute insights that could improve hospitality management strategy. This would involve proposing improvements for tangible hotels assets (such as: features) and intangible hotels assets (such as: service) that would meet Japanese tourists' expectations and, therefore, delight them. As previously mentioned, differences between Chinese tourists and Japanese tourists are highlighted along the way. To achieve our objective, we examined luxury hotel strategy to determine its fit with Japanese Tourists' Expectations. This is further discussed in point 5.4.

5.4. Japanese Tourists’ Expectations Versus Luxury Hotel Strategy

Before Covid-19, Luxury Hotels did not focus on Asian Markets and viewed Asians mainly as Chinese. For that reason, it is important in our research to introduce the Chinese for comparison with the Japanese, and to ask ourselves the question: do they expect the same from Luxury Hotels?

5.4.1. Japanese Culture versus Luxury Hotel Strategy

Portuguese Luxury Hotel strategies are principally focused on markets with European Cultures or similar. However, western culture is very different from Japanese culture. In Asia, young people are brought up to respect their elders, and scholars stress politeness as a critical dimension that westerners must take into consideration when dealing with the Japanese. (Reisinger & Turner, 1999; Ziff-Levine,1990) pointed out two major Japanese cultural attributes: one is a behavioural characteristic referred to as “polite inexplicitness,” and the other is trust. To promise a service and not fulfil it is a big trust issue for the Japanese. Communication is another issue of concern as western direct communication can be seen as rude by the Japanese. The gap between Portuguese Luxury Hotel Strategy and Japanese Culture with regard to services on offer or attendance is summarized below:

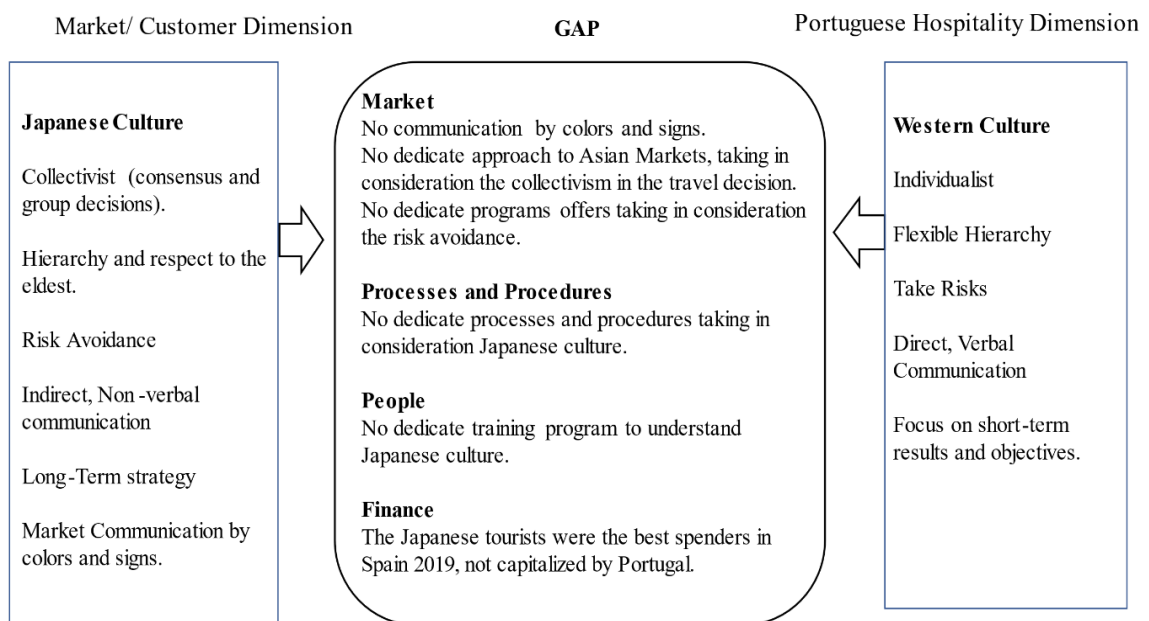


Figure 5.1: Gap between Luxury Hotel Strategy and Japanese Culture

Source: Own Elaboration

5.4.2. Japanese and Chinese Tourists - Similarities and Differences

Travel and Social Characteristics

1,354 booking.com reviews (538 Japanese and 816 Chinese) of the 46 luxury Lisbon hotels in our sample were analysed and classified according to: travel type; visit type; number of overnight stays, and hotel rating. Both the Japanese and Chinese travelled mainly for leisure (78% and 77% respectively), and as a couple, or as a family or in group (74% Japanese and 87% Chinese). More Japanese travelled as individuals than did the Chinese (26% versus 13%) and both, in more than 90% of the cases stayed 4 nights or fewer. Both rated the 5-star hotels higher than the 4-star hotels, but the Japanese rated them a little lower than the Chinese. The overall rating of 4 and 5-star hotels reviewed by the Chinese on booking.com was 8.4 and 8.7 respectively, and the Japanese ratings were similar at 8.3 and 8.5 respectively. The booking.com scale is 1 to 10 => 1 is bad and 10 is wonderful. More words were used in the reviews written about Boutique and Independent Hotels, which confirmed the findings of a study by Xu (2018) that customers are motivated to give more detailed descriptions of core attributes of the products and services of independent/chain hotels in online textual reviews to help future customers make purchase decisions. Our study provides further confirmation of this as we found there were more positive and negative comments written by Japanese customers for Independent Hotels than for Chain Hotels.

Among the Japanese, the preferred channels of communication are word-of-mouth recommendations and reviews on trip advisor.

The Most Important Hotel Attributes: Japanese versus Chinese

A qualitative analysis of the booking.com content was conducted using the open, axial and select coding to identify which Hotel Attributes were important to Japanese and Chinese tourists. These attributes grouped mainly in six dimensions: Location, Features, Room (Bedroom, Bed and Bathroom), Breakfast, Staff/Service, Finance. These were then classified according to the Balanced Scorecard Dimensions (Market/Customer, Processes and Procedures, People and Finance). The differences found between the Japanese and Chinese concerning the most important Hotel Attributes are summarized in Figure 5.2.

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Japanese	Chinese
Location	Location
Near Shops, Restaurants and Transports.	Near Transports and Touristic Points..
Facilities	Facilities
Hotel Historical Design appreciated. Also, New and Renovated.	Hotel Historical Design seen as old and outdated. Modern and New Facilities appreciated.
Room	Room
Bathroom with privacy. Existence of Bathtub, kettle and amenities. Quite, Peaceful and soundproof. Cleaning. Hot water. Room equipment working well and easy to use.	Comfort, Size and Bed. Existence of kettle and amenities. Quite and soundproof. Cleaning.
Breakfast	Breakfast
Vegetables. Diverse, not Monotonous. Early Availability . Peaceful.	Chinese Food. . Diverse, not Monotonous. Early Availability
Staff	Staff
Kind, Friendly and Helpful, proactive, solving problems. Good information about restaurants, transports,... Excuse if there is a mistake and correct quickly. Receive what they requested in advance.	Kind, Friendly, Helpful. Enthusiastic and smiling.
Price	Price
Clear Procedures about invoicing.	Pricing itself and connection with service expected for a 4 or 5 stars hotels.

Figure 5.2 *The Most Important Luxury Hotel Attributes for the Japanese and Chinese*

Source: Own Elaboration

The location or design of a hotel or room are hard to change, so these items were classified as features and this dimension was added to the other four dimensions of the balanced scorecard. The cross-reference dimension of Market/Customer is present in all these dimensions. Several improvements in processes and procedures could be made, for example, by introducing vegetables and Asian food at breakfast; providing clearer explanations of how to use the room equipment and verifying whether they are working properly before check-in; and clearly explained invoicing procedures and pricing. Staff could be trained to develop a better understanding of Asian culture and could learn, for instance, the importance of not only attributing a room with a bathtub to the Japanese, but one with bathroom privacy. Staff could be taught to be more aware of the elderly Asian's need for a kettle in which to boil water for tea, and the importance the Japanese attach to a hot bath. Another aspect of service that is important to the Japanese is the timely resolution of problems and clear, quick feedback on any issues they may have raised; it is important to bear in mind that the Japanese regard making excuses for any lack of service as impolite. Price, however, is not a big issue for the Japanese

and they usually do not bargain for discounts, but it must be stressed that price and invoicing processes should be crystal clear.

This research is in line with some other research such as that of Tsang and Ap (2007), which reports that Asians prefer the basic and practical aspects of service, giving high ratings for variables such as, “staff understanding your problems and needs”, “dependable service” and responding effectively”. The research of Resinger and Turner (1999), despite being more than a decade older, also reported that respect for others is paramount in service and seen as good manners. Also found to be of extreme importance are punctuality; giving prompt feedback; fast resolution of problems; and reduced waiting time or making up for time waited with a gift or entertainment. Japanese customers focus more on service than Chinese customers do. In accordance with the findings of Liu et al. (2017) and Magnini et al. (2011), the focus of the Chinese is on room features and facilities. This, too, is in line with the eleven determinants of customer delight: Customer service, Cleanliness, Location of the hotel, Value, Facility (other than room), Size and Décor of room, Renovation/Newness, Food, Amenities and Quietness of the hotel. Peace-of-mind also plays a large role in customer satisfaction and has a significant impact on loyalty and word-of-mouth recommendation, which means that providing hotel customers with a pleasurable, trouble-free experience not only satisfies them but also generates positive-word-mouth for the organization (Ko,2020).

Luxury Hotel Strategy Before-Covid-19

Through interviewing Hospitality Top Management and Experts and from a questionnaire given to four different sector groups (Automotive and other industries, Bank, Insurance and Other services, Education and Consultancy and Hospitality and Tourism), we obtained feedback on the Luxury Hotel Strategy for the Asian Market (Chinese and Japanese) before Covid-19 that led us to conclude there had been no long-term strategy in place for these markets. Some approaches had been made with regard to the Chinese market (mainly through the Portuguese Tourism Office), but very little or nothing at all was in place for the Japanese market.

There were no significant differences among the sectors concerning what is known about Japanese tourists and the differences between them and the Chinese. This general lack of knowledge can and should be improved.

A Performance Component Analysis was conducted, as well as a confirmation factor analysis using AMOS26. The results showed that the seven components of the observed variables: 1. Market, 2. Asian Training, 3. Front-Office Competences, 4. Continuous

improvement, 5. General Procedures, 6. Procedures-Customer, 7. Finance - were considered significant for the model. However, concerning the pre-Covid 19 long term strategy for retaining and attracting Chinese and Japanese tourists, only three components contributed to this strategy. These were the Front-office competences, Continuous improvement, and Finance. In fact, the front-office had already taken some measures that were much appreciated by the Chinese and Japanese (being kind, helpful, proactive), and their policy of continuous improvement is important. However, these were not done specifically with the Asian Markets in mind but were aimed at other markets whose cultures are closer to European culture. Finance is directly connected to the strategic decision of whether luxury hotels want to invest in the Asian markets. As far as the Market component is concerned, the interviews confirmed that nothing or almost nothing is being done with regard to training or establishing procedures dedicated to the Asian markets.

Detailed answers to the research questions can be found in point 5.5.

5.5.The Research Questions

5.5.1. What is the strategy of Portuguese luxury hotels with regard to meeting Japanese tourists' expectations (before and after-Covid-19)?

Before covid-19, the Japanese market was not a priority, and the perception of hotel management was that Japanese and Chinese tourists were, on the whole, satisfied with the Portuguese hospitality service. The consensus was also that the Japanese travel mainly in elderly groups, overseen by agencies based in the UK. Processes and Procedures were standard and did not take into account the tourists' country of origin. Some hotels, however, did include Asian food at breakfast and up-graded some accommodation to have en-suite rooms with a bathtub. Plans were also developed to attract Chinese businessmen. Concerning Personnel, there was no dedicated recruitment policy to hire staff specifically to deal with Asian markets, with hotel chains preferring to recruit natives. While hotel chains agree that Tourism schools are a good human resource, they believe they do not prepare students to understand Asian customers. For managerial positions, the preference is to recruit people with hospitality experience, yet for all other positions, candidates from other sectors of activity are welcome. A good Personal Attitude is a must and a deciding factor during the recruitment process. Training is standard, with no specific training in Asian culture. After-covid, the priority will be to develop processes in accordance with Covid requirements and to focus on people development. The aim will be to recover the European markets first, which makes sense geographically and

culturally. The nostalgia “Saudade” market, fuelled by Portuguese emigrants and foreigners working in Portugal, should recover faster than other markets. There is currently no Long-Term strategy to develop the Japanese market. However, Portugal should take full advantage of its historical heritage, and stop overs from long-haul flight connections could be important to develop these markets.

5.5.2. What do Japanese travellers consider the positive and negative hotel attributes of the luxury hotels operating in Portugal? Are the preferences of the Japanese and Chinese similar or different?

The Asian Market has hitherto been seen as predominantly Chinese, but what pleases Chinese customers differs from what pleases Japanese customers. In line with the findings of Liu et al. (2017), our study concludes that the attributes the Chinese consider more important are location, room features, facilities, and price or value for money. The Japanese put more emphasis on service items, clear processes, properly functioning room equipment with easy or clear instructions for use, a bathtub, hot water, and a bathroom designed for privacy. In short, the Japanese are more concerned about service than the Chinese are. This can be seen in the Nvivo chart in figure n° 5.3 below:

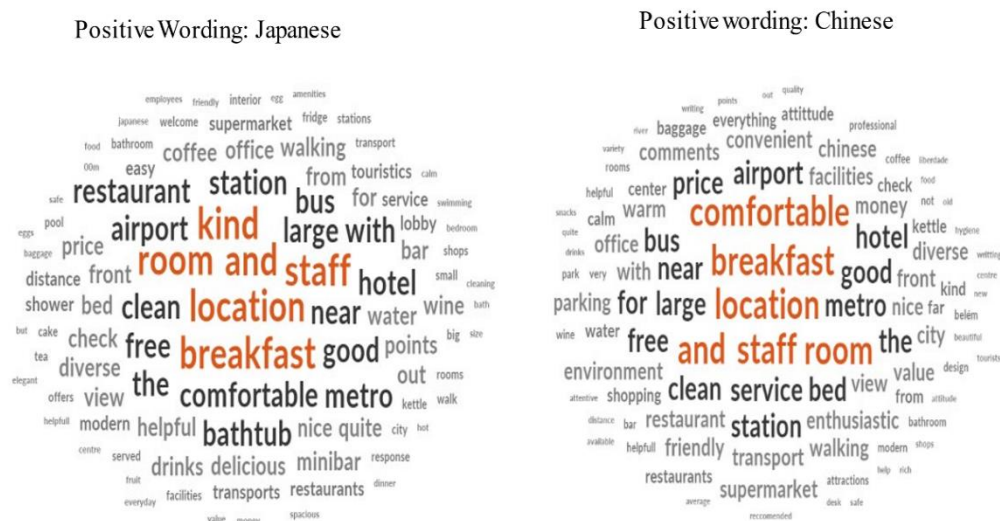


Figure n° 5.3: Bookings: Positive Wording - Japanese Versus Chinese

Source: NVivo

Japanese travel decision took in consideration worth-to-mouth advises from family and friends. Interpersonal influence and word-of-mouth (WOM) are ranked the most important information source when a consumer is making a purchase decision. These influences are especially important in the hospitality and tourism industry (Litvin et al., 2008). The role of perceived value in customers' post-purchase decision-making process is evident. Perceived value is an immediate antecedent to customer satisfaction and repurchase intention. Asian consumers (collectivists), who emphasize social harmony, are less likely to complain but more likely to switch and to spread negative word-of-mouth than Western consumers (individualists) in service failures. However only in a non-embarrassing failure will collectivists less likely complain than individualists. In an embarrassing failure, however, collectivists will more likely complain, as well as switch and spread negative word-of-mouth. (Wan, 2013). Taking these facts in consideration, retain and attract Japanese customers could be made through delighting them, fulfilling their expectations, and avoiding embarrassing situations. Understanding their culture is crucial and that should not imply a need of huge investments from the luxury hotels.

5.5.4. Is there room from improvement in hospitality to achieve a match between Japanese tourists' hotels attributes expectations and hotels attributes of Portuguese luxury hotels?

Based on the outcome of the questionnaire, respondents' knowledge of Japanese culture and what pleases Japanese tourists is very low or almost inexistent, not only in the hospitality and tourism sector but also in other sectors of activity.

Front-office competences such as, advise the customers concerning restaurants, shops, and transports nearby, proactive reaction to solve problematic situations and welcome with a happy and sincere smile are in place and please Japanese tourists, even if these procedures are standard and not taking in consideration customer country of origin. However, continuous improvement policies are important for hotels strategy, these improvements are made mainly taking in consideration the western culture and similar cultures' preferences. Hotels should develop continuous improvement policies taking in consideration customer country of origin.

To achieve higher customer satisfaction and delight for these kinds of customer, provision should be made for training in Japanese culture. There being room for improvement, an improvement plan is proposed in Table nº 5.1 involving the following aspects: Features, Market, Processes, People and Finance.

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Table 5.1.: Improvement Proposal to meet Japanese customer needs/satisfaction

Customer Dimensions	Hotel Attributes and Service	Improvement to meet Japanese customer needs/satisfaction
1. Features	Structural Attributes, out of hotel control or hard to change at short notice	Location, Facilities
2. Market	Communicate to the Japanese Market.	Communicate with figures and analogies.
3. Processes	Part of structural attributes but, can be solved with a process change at Front-Office.	Attribution of room with bathtub to Japanese customers Do not attribute a room with open bathroom concept to Japanese.
	Services that can be improved with better processes: Room	Ensure a regular basic water flow and water temperature. Check and maintenance of room equipment before check-in Inform about room equipment usage at check-in or provide an instruction guide in the room. Confirm amenities and kettle availability in the room.
	Services that can be improved with better processes: Breakfast	Availability for early check-outs Include Vegetables Diverse, not repetitive. Planning to avoid crowd (noise) in the breakfast hall.

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Customer Dimensions	Hotel Attributes and Service	Improvement to meet Japanese customer needs/satisfaction
3. Processes	Services that can be improved with better processes: Price	Clear procedures and explanation about pricing/ invoicing
	Services that can be improved with better processes/ people development	Cleaning: better processes and staff training Tasty breakfast: processes and products presentation and cooked in accordance with national preferences. Helpful, pro-active: Give information about restaurants, sights to see, solve problems quickly. Entertain and compensate for check-in delays. Improving processes and staff attitude through better understanding of customer's needs (e.g., avoiding behaviours regarded as rude)
	Services that can be improved with better processes but may have additional associated costs.	Welcome package, Free drinks or food
4. People	Services that can be improved by people development	Understanding of customer needs, expectations, and culture.
5. Finance	Customer's Perception about price (high or not) and value for money	Clear information about pricing and invoicing.

Source: Own Elaboration

5.6. Major Conclusions

There is a need to put in place a Long-Term Luxury Hotel Strategy for the Asian Market in general and the Japanese market in particular. The Japanese market is an attractive and profitable market for luxury hotels, but Hospitality teams need be trained in Japanese culture to understand and meet Japanese customers' expectations, as confirmed by the literature review described in Chapter 2. Attracting and retaining Japanese customers requires a long-term commitment but promises no short-term return on investment. The differences between the quality of service demanded by Japanese and Chinese customers should be acknowledged and acted upon given that they vary considerably. Certain hotels and architectural features that the Japanese consider to be of historic interest may be considered outdated by the Chinese. While smiling faces and a cheerful demeanour at work are a sign of welcome for the Chinese, the Japanese attach more value to clear procedures, properly working equipment, and helpful and efficient staff. Communication via drawings and use of colours is also highly appreciated by the Japanese. And, as saunas and relaxation facilities are much appreciated in Japan, a bathtub with constantly available hot water is very important to help them relax after a day walking around the city, sightseeing. Healthy food should include vegetables, which must be available at breakfast.

5.7. Research Contributions

A mismatch was found between Hotel Attributes (Tangible and Intangible), Hospitality Strategy and Japanese customer (tourist) needs/expectations. Given that Japanese and Chinese tourists attach different levels of importance to certain attributes, the strategy of luxury hotels should take into account their customers' country of origin. Some improvements were proposed above in table 5.1. In addition to the four balanced scorecard dimensions, other features have been pointed out. These are mainly related to Facilities (Hotel and Room).

5.8. Limitations

Due to the exploratory nature of the study, a lot of "don't know" answers were submitted in the questionnaires, which led to there being some outliers. As the subject is very specific, the number of times "unknown" was submitted reduced the sample and valid responses. The "Don't know" answers were used to evaluate the respondents' knowledge and all the limitations implicit in that.

5.9. Topics for Future Research

Concerning future research, we propose four approaches:

- 1) A hotel case study should be conducted to evaluate what impact the proposed improvements will have with regard to dealing with Japanese tourists.
- 2) In our sample, more than 76% of Japanese and Chinese travel for leisure and with others as a couple, family, or group. Japanese travelling alone represent 26% of the total, compared to 13% for the Chinese. 90% of the Japanese and Chinese stayed four nights or fewer, and more than 30% stayed only one night. A deeper understanding of how to increase the number of overnight stays in Portugal, and whether the Japanese visiting Portugal are mainly seniors travelling in groups is a challenge to take into consideration.
- 3) During the interviews, there was another interesting finding that could lead to a way to attract more Japanese tourism, increase tourism income and profitability.

In Spain (2019), Japanese and Chinese tourists were the highest and second highest spenders respectively. In accordance with objectives established by the Spanish Ministry of Industry, Commerce and Tourism, Spain set out to diversify its inbound markets and improve profitability. Distant markets like the USA, China and Japan were very dynamic in 2019, which allowed Spain to attract tourists with a greater power of acquisition and thus improve profitability in the Spanish tourism sector (Isabel Oliver, 2019). Spain developed its aptly named “Shopping Tourism”. Nowadays, Madrid and Barcelona, as two of the top cities to shop in, are leading European tourism shopping destinations (“Madrid Destino 7 Estrellas, la Mejor Tienda del Mundo”). This has also helped their well-known brands: Zara, Mango, Maximo Dutti and others. Madrid and Barcelona

Many scholars have tried to understand the relationship that exists between the Japanese propensity for shopping and the custom of *omiyage* (gift/souvenir) (Keown, 1989; Ahmed & Krohn, 1991; Dace, 1995). When the Japanese travel abroad, they usually receive “*senbetsu*” or monetary gifts from their family, relatives, and co-workers. Upon accepting “*senbetsu*”, they acquire an obligation to buy *omiyage* (a gift) for their friends (Lee and Zhao, 2003).

Should Portugal develop Tourism Shopping to attract profitable markets like the Japanese? To do so would not only improve the hospitality sector but, the Portuguese economy and companies in general.

- 4) Four experiments demonstrated that consumers had a more positive attitude toward robot-staffed (vs. human-staffed) hotels when COVID-19 was most prevalent. The results

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were different from previous studies, which were conducted before the COVID-19 pandemic. Since the moderating role of perceived threat in consumers' preference for robot-staffed hotels was significant, the respondents' preference was attributed to the global health crisis (Kim et al., 2021). Taking into consideration this study, should hospitality strategy be different? Is this customer preference only a result of Covid-19 or will it, in fact, change customer behaviour afterwards? What will be the impact of strategy that considers the four pillars: Customer, Processes, People and Finance?

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Appendix A: Bibliography Summary

Customer Culture	<p>Literature</p> <p>Hofstede (1980), Ahmed and Krohn (1992), Pizam and Sussmann (1995), Armstrong et. al. (1997), Fernandez et al. (1997), Resinger and Turner (1998), Appiah-Adu et al. (2000), Choi and Chu (2000), Crofts and Erdmann (2000), Matilla (2000), Weiermair (2000), Liu et al. (2001), Reisinger and Turner (2002), Baskerville (2003), Tsaur and Lin (2004), Tsaur et.al. (2005) Singh (2006), Kuo (2007), Soares et al. (2007), Tsang and Ap (2007), Reisinger & Turner (2008), Piers et al. (2010), Hofstede and Minkov (2010), Tao (2010), Hofstede (2011), Watkins and Gnoth (2011), Chen (2013), Wan (2013), Cohen et al. (2014), Li (2014), Torres et al. (2014) Kim et al. (2015), Groves et al. (2015), Ryu et al. (2015), Zhang et al. (2015), Liu et al. (2017); Ozdemir and Yolal (2017), Williams et al. (2017), Lee et Zhao (2018), Bui and Trupp (2020).</p>
Customer Satisfaction	<p>Jonhson et al. (1995), Oh (1999), Choi and Chu (2000), Crofts and Erdmann (2000), Weiermair (2000), Turner and Resisnger (2002), Singh (2006), Briggs et al. (2007), González et al. (2007), Hemmington (2007), Kuo (2007), Tsang and Ap (2007), Reisinger & Turner (2008), Tsaur et al. (2008), Wu and Liang (2009), Chen and Chen (2010), Crick and Spencer (2011), Walls et al. (2011), Ekiz et al. (2012), Torres at al. (2014), Zhou et al. (2014), Berezina et al. (2015), Kim et al. (2015), Lu at al. (2015), Zhang et al. (2015), Kasiri et al. (2017), Liu et al. (2017), Liu et al. (2017a), Vega-Vásques et al. (2017) El-Adly (2019), Gunasekar and Sudhakar (2019), Hu et al. (2019), Nunkoo et al. (2019), Sukhu et al. (2019), Wikhamn (2019), Li et al. (2020).</p>

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<i>Service Quality</i>	<p>Armstrong et al. (1997), Oh (1999), Choi and Chu (2000), Crotts and Erdmann (2000), Liu et al. (2001), Matilla (2000), Weiermair (2000), Reisinger and Turner (2002), Tsaur and Lin (2004), Briggs et al. (2006), González et al. (2007), Hemmington (2007), Kuo (2007), Soares et al. (2007), Tsang and Ap (2007), Reisinger & Turner (2008), Tsaur et al.(2008), Wu and Liang (2009), Chen and Chen (2010), Mohsin and Lockyer (2010), Crick and Spencer (2011), Ekiz et al. (2012), Chen (2013), Jones et al. (2013), Wan (2013), Kim et al. (2014), Torres at al. (2014), Berezina et al. (2015), Lu at al. (2015), Zhang et al. (2015), Kasiri et al. (2017), Liu et al. (2017), Liu et al. (2017a), Sipe and Testa (2018), El-Adly (2019), Francesco and Roberta (2019), Nunkoo et al. (2020),</p>
<i>Customer Delight / Emotions</i>	<p>Briggs et al. (2007), Hemmington (2007), Magnini et al. (2011), Torres et al. (2014), Kim et al. (2015), Kao et al. (2016), Sipe and Testa (2018), Lee and Park (2019), Martinaityte et al. (2019), Sukhu et al. (2019).</p>
<i>Japanese Tourists Preferences</i>	<p>Ahmed and Krohn (1992), Pizam and Sussmann (1995), Resinger and Turner (1999), Appiah-Adu et al. (2000), Choi and Chu (2000), Tsang and Ap (2007), González (2008), Wu and Liang (2009), Mohsin and Lockyer (2010), Kim at al. (2011), Magnini et al. (2011), Watkins and Gnoth (2011), Ekiz et al. (2012), Kim et al. (2014), Ryu et al. (2014), Zhou et al. (2014), Assiouras et al. (2015), Berezina et al. (2016), Choi (2016), Sohn and Yoon (2016), Liu et al. (2017a), Ozdemir and Yolal (2017), Williams et al. (2017), Lee et Zhao (2018), Bui and Trupp (2020), Williams et al. (2020).</p>

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<i>Word-of month communication</i>	Oh (1999), Liu et al. (2001), González et al. (2007), Litvin et al. (2008), Mooij and Hofstede (2011), Wan (2013), Vega-Vásquez et al. (2015).
Processes and Procedures <i>Customizing Processes/Product</i>	Briggs et al. (2006), Torres et al. (2014), Zhang et al. (2015), Kasiri et al. (2017), Liu et al. (2017), Ozdemir and Yolal (2017), Lee et Zhao (2018), Lee and Park (2019), Williams et al. (2020).
<i>Hotels Features Preferences</i>	Choi and Chu (2000), Jones et al. (2013), Zhou et al. (2014), Liu et al. (2017), Lee et Zhao (2018), Xu (2018), Francesco and Roberta (2019), Gunasekar and Sudhakar (2019), Hu et. al. (2019), Li at al. (2020).
People Development <i>Hospitality, Cultural and Host-Guest Training</i>	King C. (1995), Resinger and Turner (1999), Appiah-Adu et al. (2000), Crotts and Erdmann (2000), Matilla (2000), Weiermair (2000), Reisinger and Turner (2002), Tsaor and Lin (2004), Briggs et al. (2006), Hemmington (2007), Kuo (2007), Tsang and Ap (2007), Kim et al. (2014), Groves et al. (2015), Ozdemir and Yolal (2017), Zhang et al. (2017); Wikhamn (2019).
Finance and Strategy <i>Strategy</i>	Jonhson et al. (1995), Soares et al. (2007), Hofstede and Minkov (2010), Hofstede (2011), Chen (2013), Zhang et al. (2015), Bavik (2016), Kao at al. (2016), Xu (2019).
<i>Price / Value for Money</i>	Oh (1999), González et al. (2007), Williams et al. (2017).

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Appendix B: Interview Guide (Interviews made in Portuguese)

GUIÃO DA ENTREVISTA

O conteúdo das entrevistas resulta de notas tiradas pelo entrevistador no decorrer da entrevista. O entrevistador teve papel neutro e com o objetivo de recolher informação importante para construir “grounded theory” sobre o assunto em estudo.

Pergunta n°1

Paula Carvalho: - Qual era estratégia da cadeia hoteleira que representa relativamente ao mercado asiático, antes do Covid-19?

Pergunta n°2

Paula Carvalho: - Qual era estratégia da cadeia hoteleira que representa relativamente aos processos e procedimentos dedicados ao mercado asiático, antes do Covid-19?

Pergunta n°3

Paula Carvalho: - Qual era estratégia da cadeia hoteleira que representa relativamente ao desenvolvimento de pessoas para lidar com o mercado asiático, antes do Covid-19?

Existem políticas de melhoramento contínuo? Um departamento dedicado a estas políticas?

Pergunta n°4

Paula Carvalho: - As escolas de hotelaria e turismo são uma boa fonte de profissionais para o sector de hotelaria?

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Preferem recrutar pessoas com ou sem experiência em hotelaria?

Pergunta nº5

Paula Carvalho: - Formam os colaboradores em cultura asiática?

Pergunta nº6

Paula Carvalho: - Na sua opinião, quais os mercados que irão retomar a atividade de forma prioritária pós-covid?

Pergunta nº7

Paula Carvalho: - Na sua opinião, quais das seguintes dimensões serão mais prioritárias, pós-covid? Mercado e Clientes, Processos e Procedimentos, Desenvolvimento de Pessoas, Rentabilidade.

Pergunta nº8

Paula Carvalho: - Gostaria de adicionar algum comentário?

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Appendix C : Questionnaire sent in Portuguese

AP1.

Este formulário tem por objetivo recolher a opinião de diversos profissionais, atuando nos mais diversos departamentos e sectores de atividade, com ou sem experiência no sector de hotelaria, relativamente à estratégia hoteleira em Portugal, mais propriamente sobre a abordagem ao mercado asiático antes e após Pandemia.

Este questionário foi elaborado de acordo com as normas do Regulamento Geral sobre a Proteção de Dados (RGPD), garantindo que todas as respostas dadas são anónimas e estritamente confidenciais. Os resultados destinam-se exclusivamente a fins de pesquisa científica e no âmbito de um estudo para Tese de Doutoramento.

Solicitamos apenas, 10 minutos do seu tempo para responder a este questionário.

Agradecemos, desde já, a sua colaboração!

Qualquer dúvida poderá entrar em contacto com o investigador principal através o e-mail: paula.tavares.carvalho@sapo.pt

Não existem respostas corretas ou erradas, para preenchimento do questionário siga as seguintes orientações:

- Leia atentamente cada questão;
- Em seguida, selecione a alternativa de resposta que melhor expressa a sua opinião ou perceção sobre o assunto.

Q1. Sector de atividade

(Onde atualmente desempenha funções ou última entidade onde desempenhou funções)

- Advocacia e similares
- Automóvel
- Banca e Finanças
- Consultoria em hotelaria e/ou turismo
- Ensino
- Hotelaria e Turismo
- Imobiliário
- Saúde
- Seguros

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Outro - Qual?

Q2. Se trabalha no sector de hotelaria pf indique qual a cadeia hoteleira ou hotel

- Accor (Mercure, Novotel, Sofitel)
- DHM-Discovery
- Heritage Hotels
- HF-Fenix
- Hoti Hoteis (Tryp)
- Hotusa Hotels (Exe, Eurostars)
- Intercontinental
- Marriott (Marriott, Sheraton, Fonte Cruz, Memmo Principe Real, Altis Belém)
- Minor (Tivoli, NH, Avani)
- Nau (Vintage Hotel e Palácio do Governador)
- Pestana
- Porto Bay
- Sana
- Turim
- Vila Galé
- Vip Hotels
- Outro

Q3. Qual o cargo que ocupa?

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- Administração e/ou Direção
- Empresário e/ou Trabalhador Independente
- Gestor (Manager) ou Assistente de Direção
- Abaixo de Gestor (Manager) ou Assistente de Direção
- Outro

Q4. Sexo

- Masculino
- Feminino

Q5. Idade

- 18-30
- 31-50
- >50

Discordo
Totalmente

Discordo

Não
concordo,
Nem
Discordo

Concordo

Concordo
Totalmente

Não sei

Não quero
responder

Q.6. Abordagem aos mercados asiáticos - Antes COVID-19 (em 2019)

De acordo com a sua opinião ou perceção,

Q6.1. O mercado asiático era importante para o sector de hotelaria e turismo em Portugal

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Q6.2. O mercado asiático era importante para as cadeias de hotelaria de luxo (4 e 5 estrelas) a operar em Portugal.

Q6.3. O mercado chinês era importante para as cadeias de hotelaria de luxo (4 e 5 estrelas) a operar em Portugal.

Q6.4. O mercado japonês era importante para as cadeias de hotelaria de luxo (4 e 5 estrelas) a operar em Portugal.

Q6.5. A abordagem das cadeias de hotelaria de luxo (4 e 5 estrelas) a operar em Portugal relativamente ao mercado asiático era igual para o mercado chinês e o mercado japonês

Q7. 2. O cliente - Turista Japonês

Discordo
Totalmente

Discordo

Não
concordo,
Nem
Discordo

Concordo

Concordo
Totalmente

Não sei

Não quero
responder

2.1. Satisfação antes Covid-19 (2019)

De acordo com a sua opinião ou perceção,

Q7.1. O cliente chinês estava muito satisfeito com a qualidade dos serviços da hotelaria de 4 e 5 estrelas a operar em Portugal.

Q7.2. O cliente japonês estava muito satisfeito com a qualidade dos serviços da hotelaria de 4 e 5 estrelas a operar em Portugal.

Q7.3. As cadeias hoteleiras / hotéis ofereciam serviços standard, independentemente do país de origem dos clientes.

Q8.

2.2. - Características do Cliente - Turista Japonês

De acordo com a sua opinião ou perceção, o cliente japonês:

Q8.1. É sobretudo coletivista e não individualista

Q8.2. Valoriza mais a segurança que o cliente ocidental

Q8.3. Gosta de viajar sozinho

Sim

Não

Não sei

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- Q8.4. Gosta de conhecer novos mundos
 Q8.5. Gosta de colecionar "souvenirs" e tirar fotos
 Q8.6. Gosta de dar a sua opinião sobre o serviço de forma franca e direta.
 Q8.7. Gosta de partilhar a sua experiência com familiares e amigos.
 Q8.8. Valoriza mais uma cara sorridente e simpática no "front office" do que a resolução rápida de problemas.

Q9. Sim Não Não sei

2.3. Características do Cliente - Turista Japonês versus Turista Chinês:

De acordo com a sua opinião ou percepção, o cliente japonês valoriza mais que o cliente chinês:

- Q9.1. A decoração do hotel
 Q9.2. A localização do hotel
 Q9.3. Funcionários sorridentes e entusiastas
 Q9.4. Funcionários proativos na resolução de problemas
 Q9.5. Quarto com banheira
 Q9.6. Procedimentos claros quanto ao funcionamento de TV, A/C, ...
 Q9.7. Preço

Q10. Discordo Totalmente Discordo Não concordo, Nem Discordo Concordo Concordo Totalmente Não sei Não quero responder

Parte II – Processos e Procedimentos

(Para cadeias hoteleiras ou hotéis de luxo (4 e 5 estrelas) a operar em Portugal)

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Q10.1. Os processos e procedimentos devem ser standard e aplicados de forma igual a todos os clientes, independentemente do seu país de origem.

Q10.2. O pequeno-almoço para clientes asiáticos deveria incluir vegetais e comida asiática.

Q10.3. A atribuição do quarto deveria ter em consideração as preferências do país de origem e suas superstições.

Q10.4. Todos os quartos de hotelaria de luxo deveriam ter uma chaleira.

Q10.5. Ofertas de cortesia nos quartos (água, chinelos, ...) são importantes para os clientes chineses e japoneses.

Q10.6. A verificação do bom funcionamento de todas as comodidades no quarto deve ser obrigatória antes do check-in do cliente.

Q10.7. Ligação direta a linha de emergência nos quartos é muito importante para os clientes asiáticos.

Q10.8. O funcionamento de todas as comodidades no quarto (A/C, Chuveiro, TV, ...) deveria ser claramente explicado a todos os clientes aquando do check-in no alojamento

Q11.	Discordo Totalmente	Discordo	Não concordo, Nem Discordo	Concordo	Concordo Totalmente	Não sei	Não quero responder
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Parte III – Desenvolvimento de Pessoas

(Para cadeias hoteleiras ou hotéis de luxo (4 e 5 estrelas) a operar em Portugal)

1. “Front Office”

Na sua opinião,

Q11.1. O atendimento e tratamento ao cliente é igual para todos os clientes.

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- Q11.2. A atribuição do quarto é standard e aleatória
- Q11.3. No caso de atraso no check-in, os colaboradores pedem desculpa e compensam com um “welcome drink” ou outra oferta
- Q11.4. Em geral, os funcionários têm informações para indicar e aconselhar os hóspedes, quanto a melhores restaurantes, lojas e transportes mais perto.
- Q11.5. Em geral, os funcionários têm uma atitude proativa para resolução de problemas.
- Q11.6. Em geral, os funcionários atendem o cliente com um sorriso alegre e sincero.

Q12.	Discordo Totalmente	Discordo	Não concordo, Nem Discordo	Concordo	Concordo Totalmente	Não sei	Não quero responder
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2. Políticas de Recrutamento

(Para cadeias hoteleiras ou hotéis de luxo (4 e 5 estrelas) a operar em Portugal)
 Na sua opinião,

- Q12.1. Existe uma política de recrutamento específica para funcionários dedicados a clientes asiáticos.
- Q12.2. As escolas de hotelaria e turismo são uma boa fonte de profissionais para o sector hoteleiro.
- Q12.3. As escolas de hotelaria e turismo preparam profissionais para lidar com mercados asiáticos.
- Q12.4. Para cargos de direção, as cadeias de hotéis preferem sempre profissionais com currículo em hotelaria.
- Q12.5. Para cargos de direção, pessoas com experiência em outros sectores que não hotelaria, poderão trazer valor acrescentado.

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Q12.6. Para cargos abaixo de direção as cadeias de hotéis preferem sempre profissionais com currículo em hotelaria.

Q12.7. Para cargos abaixo de direção, pessoas com experiência em outros sectores que não hotelaria, poderão trazer valor acrescentado.

Q13.	Discordo Totalmente	Discordo	Não concordo, Nem Discordo	Concordo	Concordo Totalmente	Não sei	Não quero responder
-------------	------------------------	----------	-------------------------------------	----------	------------------------	---------	------------------------

3. Políticas de Formação

(Para cadeias hoteleiras ou hotéis de luxo (4 e 5 estrelas) a operar em Portugal)

Na sua opinião,

Q13.1. Deveriam formar as equipas em cultura asiática

Q13.2. Deveriam formar as equipas em cultura chinesa

Q13.3. Deveriam formar as equipas em cultura japonesa

Q13.4. A formação em atendimento deveria ser standard, isto é atendimento igual para todos os clientes, independentemente do país de origem.

Q13.5. Deveriam ter uma política de melhoramento continuo

Q13.6. Todos os funcionários deveriam poder propor melhoramentos

Q13.7. Deveria existir um departamento responsável, área ou grupo de trabalho para discutir, avaliar e após aprovação, planear e implementar os melhoramentos sugeridos.

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Q14.	Discordo Totalmente	Discordo	Não concordo, Nem Discordo	Concordo	Concordo Totalmente	Não sei	Não quero responder
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Parte IV: Financeiro e Sustentabilidade - Antes Covid-19 (em 2019)

(Para cadeias hoteleiras ou hotéis de luxo (4 e 5 estrelas) a operar em Portugal)

Na sua opinião,

Q14.1. O mercado asiático era rentável

Q14.2. O mercado chinês era rentável

Q14.3. O mercado japonês era rentável

Q14.4. As cadeias hoteleiras tinham uma estratégia de Longo Prazo para atrair e reter os turistas chineses.

Q14.5. As cadeias hoteleiras tinham uma estratégia de Longo Prazo para atrair e reter os turistas japoneses.

Q15.	Discordo Totalmente	Discordo	Não concordo, Nem Discordo	Concordo	Concordo Totalmente	Não sei	Não quero responder
-------------	------------------------	----------	-------------------------------------	----------	------------------------	---------	------------------------

Parte V - Estratégia Pós-Covid-19

1. Rentabilidade

(Para cadeias hoteleiras ou hotéis de luxo (4 e 5 estrelas) a operar em Portugal)

Na sua opinião,

Q15.1. O mercado asiático será rentável

Q15.2. O mercado chinês será rentável

Q15.3. O mercado japonês será rentável

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	Discordo Totalmente	Discordo	Não concordo, Nem Discordo	Concordo	Concordo Totalmente	Não sei	Não quero responder
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2. Estratégia

(Para cadeias hoteleiras ou hotéis de luxo (4 e 5 estrelas) a operar em Portugal)

Na sua opinião, deverá haver mudanças pós-pandemia

Q16.1. Na estratégia como um todo

Q16.2. Nos processos e procedimentos

Q16.3. Nas ações de marketing

Q16.4. Nas ações de formação

Q17. Na sua opinião quais serão as prioridades das cadeias hoteleiras em relação melhoramentos e desenvolvimento no pós-pandemia?

Classifique por ordem de prioridade, sendo 1 o mais prioritário (terá de arrastar a opção para cima ou para baixo, colocando na ordem desejada).

Decoração e imagem

Desenvolvimento e formação de pessoas

Marketing e captação de clientes

Procedimentos e Processos

Rentabilidade

Q18. Na sua opinião quais serão os mercados prioritários a desenvolver ou retomar no pós-pandemia?

Classifique por ordem de prioridade, sendo o 1 o mais prioritário (terá de arrastar a opção para cima ou para baixo, colocando na ordem desejada).

- Austrália
- Brasil
- Canadá

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- China
 - EUA
- Japão
 - Países Africanos
- Países Europeus
 - Outros

Q19. Outras considerações que considere importantes

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Appendix D: Lisbon 5 stars and 4 stars hotels operating in Lisbon, announced at booking.com and sample analysed.

#	Hotel Name (Lisbon)	Lisbon Metropolitan Area	Sample						Sample Analysis				
			Stars	Aver. Score	Review Number Japanese	Aver. Score	Review Number Chinese	Aver. Score	Review Number Japanese	Aver. Score	Review Number Chinese	Aver. Score	
	Top 20 Hotel Chain- Atlas da Hotelaria (Deloitte, 2019)												
	1-Pestana												
1	Pestana Palace	Lisbon	5	9,0	1	9,0	0		1	9,0	0		
2	Pestana Cidadela Cascais	Cascais	5	8,7	0		5	8,4					
3	CR7	Lisbon	4	8,9	1	10,0	7	9,1	1	10,0	7	9,1	
4	Pestana Sintra	Sintra	4	8,0	1	7,5	5	7,6					
	2-Vila Galé												
5	Vila Galé Palácio Arcos	Oeiras	5	9,0	1	10,0	0						
6	Vila Galé Sintra	Sintra	5	8,3	0		6	8,9					
7	Vila Galé Opera	Lisbon	4	7,9	3	9,2	7	8,0	3	9,2	7	8,0	
8	Vila Galé Estoril	Cascais	4	8,0	1	6,7	2	7,7					
9	Vila Galé Ericeira	Mafra	4	8,2	1	9,2	1	3,3					
10	Vila Galé Cascais	Cascais	4	8,4	0		5	8,7					
	3-Accor												
11	Sofitel Lisbon Liberdade	Lisbon	5	8,8	10	8,2	11	8,1	10	8,2	11	8,1	
12	Mercure Lisboa	Lisbon	4	8,0	3	8,8	9	8,3	3	8,8	9	8,3	
	4-Minor												
13	Tivoli Av. Liberdade	Lisbon	5	9,1	7	8,6	14	8,6	7	8,6	14	8,6	
14	Tivloi Palacio Seteais-Sintra	Sintra	5	9,2	0		3	9,7					
15	Tivoli Oriente	Lisbon	4	8,7	8	8,2	38	8,9	8	8,2	38	8,9	

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16	Tivoli Sintra	Sintra	4	8,1	4	9,5	22	8,6				
17	Novotel Lisboa	Lisbon	4	8,0	4	6,5	11	8,4	4	6,5	11	8,4
18	NH Campo Grande	Lisbon	4	8,3	3	8,6	8	8,7	3	8,6	8	8,7
19	Avani Av. Liberdade	Lisbon	4	8,6	2	8,1	2	7,1	2	8,1	2	7,1
20	NH Liberdade	Lisbon	4	8,9	1	8,3	3	7,5	1	8,3	3	7,5
	5-Hoti-Hoteis											
21	Tryp Aeroporto	Lisbon	4	8,7	50	8,1	42	8,5	50	8,1	42	8,5
22	Melia Oriente	Lisbon	4	8,4	15	8,2	17	8,1	15	8,2	17	8,1
	6-Marriott											
23	Sheraton Lisboa	Lisbon	5	8,6	5	7,5	6	5,9	5	7,5	6	5,9
24	Memmo Principe Real	Lisbon	5	9,2	1	10,0	3	9,6	1	10,0	3	9,6
25	FonteCruz Lisboa	Lisbon	5	8,6	0		0					
26	Sheraton Cascais	Cascais	5	8,5	0		8	8,6				
27	Lisboa Marriott	Lisbon	4	8,2	3	7,8	8	6,8	3	7,8	8	6,8
	7-Sana											
28	Epic Sana Lisboa	Lisbon	5	9,2	11	9,1	26	9,0	11	9,1	26	9,0
29	Myriad	Lisbon	5	9,3	8	9,1	51	9,0	8	9,1	51	9
30	Sana Evolution	Lisbon	4	8,9	5	8,5	17	8,7	5	8,5	17	8,7
31	Sana Malhoa	Lisbon	4	8,6	4	9,2	19	8,5	4	9,2	19	8,5
32	Sana Metropolitan	Lisbon	4	8,3	1	7,1	14	8,7	1	7,1	14	8,7
33	Sana Sesimbra	Sesimbra	4	8,4	0		0					
	8-VIP											
34	VIP Grand Lisboa	Lisbon	5	7,9	1	7,1	12	7,9	1	7,1	12	7,9
35	VIP Executive Arts	Lisbon	4	8,1	5	7,2	24	8,2	5	7,2	24	8,2
36	VIP Executive Picoas	Lisbon	4	8,8	5	8,9	5	8,8	5	8,9	5	8,8
37	VIP Saldanha	Lisbon	4	7,5	1	6,0	0		1	6,0	0	
38	VIP Entrecampos	Lisbon	4	7,6	3	7,4	10	8,1	3	7,4	10	8,1
39	VIP Santa Iria	Loures	4	7,8	0		8	7,6				
	9-Intercontinental											

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40	Intercontinental Lisboa	Lisbon	5	8,8	5	7,5	3	9,7	5	7,5	3	9,7
41	Intercontinental Cascais	Cascais	5	9,3	1	9,6	3	10				
42	Holiday Inn Continental	Lisbon	4	8,2	10	8,4	13	8,1	10	8,4	13	8,1
43	Holiday Inn Lisboa	Lisbon	4	7,9	3	7,2	17	7,9	3	7,2	17	7,9
	10-DHM											
44	Ramada Lisboa	Lisbon	4	8,4	12	8,0	69	8,6	12	8,0	69	8,6
	Sub-total Top 1 to 10			8,5	200	8,3	534	8,3	191	8,2	466	8,3
	11-Dom Pedro											
45	Dom Pedro Lisboa	Lisbon	5	8,6	5	8,7	15	8,3				
	12-Nau											
46	Palácio do Governador	Lisbon	5	9,1	4	9,4	14	8,3				
	13-HF Fenix											
47	HF Fenix Lisboa	Lisbon	4	8,6	11	8,0	25	8,7				
48	HF Fenix Urban	Lisbon	4	8,8	6	8,0	8	8,3				
	14-Porto Bay											
49	Porto Bay Liberdade	Lisbon	5	9,0	6	9,1	4	9,1				
50	Porto Bay Marquês		4	9,0	0		6	9,1				
	15-Hotusa											
51	Eurostars Museum	Lisbon	5	9,1	13	8,6	21	9,1				
52	Eurostars das Letras	Lisbon	5	8,4	6	7,4	14	8,4				
53	Eurostars Lisboa Parque	Lisbon	4	8,3	1	10,0	10	7,2				
54	Eurostars Cascais	Cascais	4	8,7	1	10,0	18	9,1				
	16-Real											
55	Hotel Real Palácio	Lisbon	5	8,3	22	7,4	8	8,8	22	7,4	8	8,8
56	Grande Real Villa Itália	Cascais	5	9,2	1	8,3	8	8,9				
57	Real Oeiras	Oeiras	4	8,4	0		3	8,2				
	17-Turim											
58	Turim Boulevard	Lisbon	5	9,0	6	7,9	17	8,4				
59	Turim Terreiro Paço	Lisbon	4	8,1	28	8,4	34	8,2	28	8,4	34	8,2

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60	Turim Av. Liberdade	Lisbon	4	8,1	23	8,2	46	8,1	23	8,2	46	8,1
61	Turim Alameda	Lisbon	4	8,2	14	7,9	10	8,5				
62	Turim Marquês	Lisbon	4	8,7	19	8,6	81	8,6				
63	Turim Lisboa	Lisbon	4	8,1	17	8,0	12	9,0				
64	Turim Ibéria	Lisbon	4	8,4	15	8,2	14	8,6				
65	Turim Saldanha	Lisbon	4	8,5	10	8,6	57	8,8				
66	Turim Europa	Lisbon	4	7,9	5	8,1	21	8,3				
	18-MGM	*										
	19-Luna	*										
	20-Continental											
67	Radisson Blu	Lisbon	4	8,3	22	8,6	37	8,5	22	8,6	36	8,5
68	Hotel Flórida	Lisbon	4	8,2	16	8,2	9	8,4				
	Sub-total Top 11 to 20			8,5	251	8,4	492	8,5	95	8,1	124	8,4
	Other Hotels Groups											
	Altis											
69	Altis Avenida	Lisbon	5	8,8	13	8,9	15	8,4				
70	Altis Belém - Design	Lisbon	5	9,0	11	9,5	11	8,4				
71	Altis Grand Hotel	Lisbon	5	8,8	7	8,1	27	8,6				
72	Altis Prime	Lisbon	4	8,8	11	8,4	10	8,5				
73	Altis Prata Hotel	Lisbon	4	9,5	7	9,4	14	9,9				
74	Altis Suites	Lisbon	4	8,7	5	8,5	5	7,0				
	Olissipo											
75	Olissipo Lapa Palace	Lisbon	5	9,2	5	8,5	5	8,3				
76	Olissipo Castelo	Lisbon	4	8,8	9	8,7	0					
77	Olissipo Saldanha	Lisbon	4	9,1	9	9,1	5	9,6				
78	Olissipo Marques Sá	Lisbon	4	8,8	4	8,2	8	8,2				
	Hilton-Double Tree											
79	Double Tree	Lisbon	4	7,9	2	8,5	4	6,6				
	Four Season											

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80	Four Season Ritz Iberostars	Lisbon	5	8,5	4	9,3	4	8,8				
81	Iberostars Selection 3K	Lisbon	5	8,8	2	9,6	10	9,1				
82	Hotel 3K Madrid	Lisbon	4	7,3	7	8,1	12	7,0				
83	Hotel 3K Barcelona Vincci	Lisbon	4	7,9	3	9,3	19	7,7				
84	Vincci Baixa	Lisbon	4	8,8	16	8,3	7	8,8				
85	Vincci Liberdade H10	Lisbon	4	9,2	9	8,5	27	9,2				
86	One Palace Anunciada	Lisbon	5	8,9	3	8,8	2	6,3				
87	H10 Duque Loulé Neya	Lisbon	4	9,0	5	7,9	25	9,2				
88	Neya Lisboa Czar	Lisbon	4	8,4	2	8,6	3	7,9				
89	Czar Lisboa Zenit	Lisbon	4	8,4	2	9,6	3	7,9				
90	Zenit Lisboa Corinthia	Lisbon	4	8,3	2	9,0	4	9,6				
91	Corinthia Lisboa Alif	Lisbon	5	8,9	11	8,5	17	8,5				
92	Hotel Alif Avenidas Jupiter	Lisbon	4	8,4	15	8,3	22	8,2				
93	Jupiter Lisboa Bensaude	Lisbon	4	9,0	10	8,1	18	9,0				
94	Hotel Açores Lisboa PHC	Lisbon	4	8,4	1	10,0	6	8,6				
95	Hotel Mundial	Lisbon	4	8,4	50	8,3	82	8,1	50	8,3	82	8,1
96	Portugal Boutique	Lisbon	4	9,4	13	9,3	48	9,5	13	9,3	48	9,5

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	Beautique											
97	Figueira Beautique	Lisbon	4	8,9	43	8,4	23	9,0	43	8,4	23	9,0
98	WC Beautique	Lisbon	4	9,0	4	7,1	36	8,8				
99	Madalena Beautique	Lisbon	4	9,0	0		3	8,8				
	Heritage											
99	Britania Boutique	Lisbon	5	9,5	17		0		17	9,3	0	
100	Lisboa Plaza	Lisbon	4	9,1	13	9,3	2	7,3	13	9,3	2	7,3
101	Heritage Av. Liberdade	Lisbon	5	9,2	6	8,6	1	9,6	6	8,6	1	9,6
102	As Janelas Verdes	Lisbon	4	9,2	3	9,7	1	10,0	3	9,7	1	10,0
103	Solar do Castelo	Lisbon	4	9,2	1	9,2	0		1	9,2	0	
	Bom Porto											
104	The Lumiares Hotel	Lisbon	5	9,3	6	9,7	13	9,0				
105	The Vintage Hotel	Lisbon	5	9,0	1	10,0	2	9,4				
	Browns											
106	Browns Central	Lisbon	4	9,2	19	8,6	36	8,9				
	Memmo											
107	Memmo Alfama	Lisbon	4	9,2	4	9,7	1	10,0				
	My Story											
108	My Story Hotel Figueira	Lisbon	4	9,5	0		3	8,3				
	Lux											
109	Lux Lisboa Park	Lisbon	4	8,8	3	5,9	18	8,3				
	Barcelo											
110	Occidental Lisboa	Lisbon	4	8,5	1	9,6	3	8,8				
	Stay											
111	Stay Hotel Chiado	Lisbon	4	8,3	0		0					
	Belver											
112	Hotel Principe Real	Lisbon	4	7,6	0		0					
	Casual											
113	Casual Belle Epoque	Lisbon	4	8,9	4	8,8	4	7,8				

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	Sub-total Other Groups			8,8	363	8,8	559	8,5	146	9,0	157	8,9
	Independents											
114	Avenida Palace	Lisbon	5	9,2	41	8,8	8	8,7	41	8,8	8	8,7
115	Lisboa Carmo	Lisbon	4	9,2	25	8,6	17	9,0	25	8,6	17	9,0
116	Corpo Santo Lisbon	Lisbon	5	9,5	20	9,0	27	9,5	20	9,0	27	9,5
117	Hotel Santa Justa	Lisbon	4	9,3	20	8,4	17	9,1	20	8,4	17	9,2
118	Lisboa Pessoa	Lisbon	4	9,1	16	8,5	12	9,0				
119	York House	Lisbon	4	8,8	13	9,2	1	9,0				
120	Lisbon Wine	Lisbon	4	9,3	12	8,7	6	9,7				
121	International Design	Lisbon	4	8,7	11	8,6	10	9,1				
122	Bessa Hotel Liberdade	Lisbon	4	9,1	10	8,3	29	8,6				
123	Hotel da Baixa	Lisbon	4	9,5	10	9,1	22	9,2				
124	Lengendary Lisboa	Lisbon	4	8,4	9	8,6	8	8,3				
125	Hotel Real Parque	Lisbon	4	8,2	9	8,7	24	8,3				
126	Lutecia Smart Design	Lisbon	4	8,4	8	8,8	18	8,2				
127	Hotel Marquês Pombal	Lisbon	4	8,9	7	9,0	8	9,1				
128	Lx Boutique Hotel	Lisbon	4	8,9	6	7,7	3	8,2				
129	OnJ S. Lazaro	Lisbon	4	9,2	5	9,3	9	9,7				
130	Upon Lisbon	Lisbon	4	8,9	4	8,9	12	8,8				
131	Inspira Santa Marta	Lisbon	4	9,0	4	8,5	10	8,6				
132	Hotel do Chiado	Lisbon	4	9,2	3	9,0	1	9,2				
133	Hotel da Estrela	Lisbon	4	8,6	3	7,2	0					
134	Valverde Hotel	Lisbon	5	9,2	2	10,0	2	9,6				
135	1908 Lisboa	Lisbon	4	9,3	2	9,6	15	9,5				
136	9Hotel Mercy	Lisbon	4	8,6	1	9,6	1	6,7				
137	The Leaf Boutique Hotel	Lisbon	4	9,2	0		0					
138	Hotel Santiago Alfama	Lisbon	5	9,3	0		0					
139	Hotel Jeronimos 8	Lisbon	4	8,1	0		9	8,4				
140	You and the sea	Mafra	4	9,3	0		0					

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141	Sintra Boutique Hotel	Sintra	4	9,3	2	7,1	19	8,9				
142	Arribas Sintra Hotel	Sintra	4	8,7	0		11	8,1				
143	Stay Hotel	Mafra	4	8,0	2	9,0	4	8,0				
144	Penha Longa	Sintra	5	9,0	2	7,3	7	9,4				
145	Lagoas Park Hotel	Oeiras	4	8,9	1	9,6	3	10,0				
146	The Albatroz Hotel	Cascais	5	9,2	0		2	9,5				
147	Cascais Miragem	Cascais	5	9,3	1	10,0	6	8,8				
148	Farol Hotel	Cascais	5	8,7	0		2	9,0				
149	Senhora da Guia	Cascais	5	8,2	0		1	10,0				
150	Hotel Fortaleza	Cascais	5	9,2	3	8,9	10	9,1				
151	The Oitavos	Cascais	5	8,4	2	8,1	0					
152	Muchacho Hotel	Cascais	4	7,2	0		0					
	Sub-total Independents			8,9	254	8,7	334	8,9	106	8,7	69	9,1
	92% of total 166 hotels			8,7	1 068	8,6	1 919	8,6	538	8,5	816	8,7
									50,4%		42,5%	

Source: Portuguese territory division for statistics purpose-Portuguese Tourism oficial office, 2019 (Estabelecimentos por NUTS-Turismo de Portugal) and www.booking.com, consulted from May 1st to June30th, 2020 and updated from December 1st, 2020 and January 16th, 2021.

Appendix E – Interviews to Hospitality Top Management and Expert made in Portuguese (Summary in English at table 4.11)

O conteúdo abaixo resulta de notas tiradas pelo entrevistador no decorrer da entrevista. O entrevistador teve papel neutro e como objetivo recolher informação importante para construir “grounded theory” sobre o assunto em estudo.

Entrevista n°1

15-11-2017

Hora: 15h:00m

Duração: 1h:01 minutes

Tipo: Reunião presencial

Experiência Profissional:

Membro Conselho de Administração em Cadeia de Hotéis

Experiência em Hotelaria: Mais de 7 anos.

Pergunta n°1

Paula Carvalho: - Qual era estratégia da cadeia hoteleira que representa relativamente ao mercado asiático?

Participante n° 1 – Não temos uma estratégia dedicada ao mercado asiático. Apostar no mercado asiático pressupõe muito investimento com ações de marketing, deslocações aos mercados, etc. É mais fácil e mais rentável focar em mercados mais próximos. Os asiáticos esperam um serviço de qualidade que em Portugal não conseguimos oferecer, mesmo os hotéis em Portugal que tem 5 estrelas na porta não oferecem um serviço de 5 estrelas. Quando falamos em asiáticos imediatamente pensamos em chineses, compreender os asiáticos é quase missão impossível. Para nós o mercado asiático é um mercado nicho. Já tentamos também atrair o mercado judaico introduzindo vários rituais para os atrair para os nossos hotéis e com sucesso.

Pergunta n°2

Paula Carvalho: - Qual era estratégia da cadeia hoteleira que representa relativamente aos processos e procedimentos dedicados ao mercado asiático?

Participante n° 1 – O único procedimento dedicado ao mercado asiático é incluir comida asiática no pequeno-almoço quando temos grupos asiáticos.

Pergunta n°3

Paula Carvalho: - Qual era estratégia da cadeia hoteleira que representa relativamente ao desenvolvimento de pessoas para lidar com o mercado asiático?

Participante n° 1 – Tentamos no passado em alinhamento com o Turismo de Portugal formar as pessoas em cultura chinesa. Número a atribuir ou não atribuir, superstições, ... mas, sem grande sucesso.

Pergunta n°4

Paula Carvalho: - As escolas de hotelaria e turismo são uma boa fonte de profissionais para o sector de hotelaria?

Preferem recrutar pessoas com ou sem experiência em hotelaria?

Participante n° 1 – Sim as escolas de hotelaria são uma boa fonte de profissionais e de estagiários. Para direção de hotel preferimos com experiência em hotelaria, para outras funções poderão ter ou não.

Entrevista nº2

10-12-2020

Hora: 15h:30m

Duração: 48 minutes

Tipo: Conferência telefónica

Experiência Profissional:

Membro Conselho de Administração em Cadeia de Hotéis

Professor em Pós-Graduação de Hotelaria e Turismo

Experiência em Hotelaria: Mais de 18 anos.

Pergunta nº1

Paula Carvalho: - Qual era estratégia da cadeia hoteleira que representa relativamente ao mercado asiático, antes do Covid-19?

Participante nº 2 - Depende dos hotéis, nos hotéis em Évora, Coimbra, Porto e Lisboa começaram a receber clientes asiáticos japoneses antes de clientes chineses, mas com pouca expressão.

O mercado asiático é importante para Portugal para que possa depender menos dos mercados europeus. No ano passado, o Brasil e o Estados Unidos da América tiveram muita relevância. Existem alguns voos para o Japão e para a China. As estatísticas macroeconómicas indicam que existiram mais asiáticos a viajar para a Europa, pelo que existe uma oportunidade de crescimento.

A expansão do aeroporto é para receber voos de longo curso, necessário para receber este tipo de mercados. No entanto, para esta cadeia de hotéis, o mercado asiático não é uma prioridade. Eles já viajaram para a China numa ação do Turismo de Portugal mas, para o Japão, este tipo de ações ainda não foram feitas, nem por eles, nem pelo Turismo de Portugal.

Os chineses costumam ter um representante local a dar suporte. Os chineses não têm maturidade e segurança suficiente para negociar diretamente com os hotéis.

Chineses e Japoneses costumam viajar em pacotes Portugal-Espanha (Madrid, Sevilha e outras cidades espanholas), gostam de viagens culturais (cidades históricas e património cultural). Vem em grupos, a localização não é uma prioridade para os chineses, para os japoneses não sei. Japoneses vêm mais individualmente que os chineses.

Os chineses são muito contidos quanto ao preço e em tudo o que gastam no hotel. Os chineses são mais desconfiados que os japoneses. Alguns chineses estão a viajar pela primeira vez. Os

japoneses já viajam há muito tempo e tem uma cultura mais próximo da cultura europeia que os chineses.

Pergunta n°2

Paula Carvalho: - Qual era estratégia da cadeia hoteleira que representa relativamente aos processos e procedimentos dedicados ao mercado asiático, antes do Covid-19?

Participante n°2 - Têm processos e procedimentos standard sem distinção para o mercado asiático mas, quando tem um grupo asiático incluem vegetais e comida asiática no pequeno almoço mas, o participante pensa que não é relevante para a satisfação do cliente. O cliente asiático quer provar novos tipos de comida. Tem quartos com banheira, mas, nenhum procedimento específico para os atribuir a asiáticos. Em alguns quartos fizeram melhoramentos e retiraram a banheira para ficar com um estilo mais europeu, mas é um facto que os asiáticos escolhem quartos com banheira. Num grupo dirigem-se sempre ao agente representante do grupo.

Pergunta n°3

Paula Carvalho: - Qual era estratégia da cadeia hoteleira que representa relativamente ao desenvolvimento de pessoas para lidar com o mercado asiático, antes do Covid-19?

Existem políticas de melhoramento contínuo? Um departamento dedicado a estas políticas?

Participante n° 2 – Não tem formação específica para lidar com mercados asiáticos, mas, existem políticas de melhoramento contínuo. Querem estar atentos a pequenos detalhes, no quarto, no serviço e na comida, isto não é caro, mas faz a diferença na satisfação do cliente. Não existe um departamento apenas, dedicado a políticas de melhoramento contínuo.

Pergunta n°4

Paula Carvalho: - As escolas de hotelaria e turismo são uma boa fonte de profissionais para o sector de hotelaria?

Preferem recrutar pessoas com ou sem experiência em hotelaria?

Participante n°2– As escolas de hotelaria e turismo são uma boa fonte de profissionais no geral, mas não são especializadas no mercado asiático. O recrutamento é feito também nestas escolas.

Para quase todas as funções preferem recrutar pessoas com experiência em hotelaria. No entanto, para áreas financeiras ou marketing poderão ter outro “background”. Não arriscam recrutar um Diretor de Hotel sem que o mesmo tenha experiência prévia em gestão hoteleira.

Pergunta n°5

Paula Carvalho: - Formam os colaboradores em cultura asiática?

Participante n°2: - Não. Para lidar com diferentes clientes e culturas preferem recrutar alguém nativo desses países invés de formar as pessoas locais em outras culturas. Por exemplo, em Sintra, tinham um pacote de SPA com praticas chinesas e recrutaram pessoas ligadas à cultura chinesa. Tem uma francesa que lida com o mercado francês e uma alemã que lida com o mercado alemão.

Pergunta n°6

Paula Carvalho: - Na sua opinião, quais os mercados que irão retomar a atividade de forma prioritária pós-covid?

Participante n°2: - Primeiro os mercados europeus resultado da vacinação covid, depois o Brasil, tem hotéis no Brasil e estão com uma boa taxa de ocupação. Depois, Japão, China ou Estados Unidos da América.

Pergunta n°7

Paula Carvalho: - Na sua opinião, quais das seguintes dimensões serão mais prioritárias, pós-covid? Mercado e Clientes, Processos e Procedimentos, Desenvolvimento de Pessoas, Rentabilidade.

Participante n°2: - Em 2021, Processos alinhados com regras do Covid-19.

Depois, desenvolvimento de pessoas, mercado e por fim financeiro.

Com o covid, existe um problema, que não é um problema de preço. O mercado está a pressionar o preço para descer, mas estudos indicam que o problema da procura não é preço, mas sim perda de poder de compra ou segurança. Se não houver segurança, as pessoas não viajam e não é por causa do preço.

Pergunta n°8

Paula Carvalho: - Gostaria de adicionar algum comentário?

Participante n°2: - A conexão de voos é muito importante para desenvolver os mercado asiáticos. Conexões dos voos da Lufthansa com os Emirados (Dubai) contribuíram para o crescimento desses mercados. O projeto de ampliação do aeroporto de Lisboa estava ligado a esta necessidade, para poder receber aviões de maiores dimensões. O mercado americano e brasileiro cresceu por causa disso.

Entrevista n°3

11-12-2020

Hora: 15h:30m

Duração: 35 minutes

Tipo: Conferência telefónica

Experiência Profissional:

Atual: Diretor Geral em cadeia internacional de hotéis

Professor em pós-graduação sobre Hotelaria e Turismo

Número de anos de experiência em Hotelaria: Mais de 31 anos.

Pergunta n°1

Paula Carvalho: - Qual era estratégia da cadeia hoteleira que representa relativamente ao mercado asiático, antes do Covid-19?

Participante n°3: - O mercado asiático era importante para Portugal em 2020, principalmente o mercado chinês. O Turismo de Portugal focou-se no mercado asiático sobretudo devido ao seu poder de compra, mas, mesmo assim penso que o Turismo de Portugal terá de investir mais nesse mercado. Neste mercado estamos um pouco dependentes das ações do Turismo de Portugal. Para mercados de proximidade, fazemos ações diretas e individualmente. Para mercados distantes precisamos de estar alinhados com o Turismo de Portugal, necessitamos de apoio estratégico e para poder chegar a grandes operadores por causa dos custos que estão associados. Para mercados distantes como o americano, canadiano ou australiano também arriscamos aproximações diretas pois sabemos que poderemos obter bom retorno do investimento. Penso que relativamente ao mercado asiático o maior problema não é a distância, nem a cultura, mas, sim a necessidade de fazer promoção localmente nesses países. O mercado japonês não tem expressão em Portugal.

Pergunta n°2

Paula Carvalho: - Qual era estratégia da cadeia hoteleira que representa relativamente aos processos e procedimentos dedicados ao mercado asiático, antes do Covid-19?

Participante n°3: - Para os hotéis da nossa cadeia hoteleira não temos processos ou procedimentos dedicados exclusivamente a clientes japoneses ou chineses. No entanto, se tivermos um grupo de asiáticos incluímos no pequeno-almoço, vegetais e comida asiática. Dois andares em

um dos hotéis em Lisboa foram intervencionados e introduzida a banheira em todas as casas de banho de todos os quartos, para poder satisfazer as preferências dos clientes asiáticos.

Temos menu de experiências, mas, não formulados especialmente levando em consideração as preferências dos asiáticos. No entanto, os mesmos são personalizados e com preocupação na autenticidade. Os colaboradores dos hotéis não possuem conhecimento acerca da cultura asiática para que possam oferecer os programas em alinhamento com esse conhecimento. Esse conhecimento existe para o cliente brasileiro ou americano, mas não para o cliente asiático.

Os asiáticos criam oportunidade de negócio em volume, mas, as margens são pequenas, ficamos com pouca margem para fazer melhoramentos nos serviços oferecidos.

O atendimento é “standard”. Penso que os clientes querem saber mais sobre os costumes portugueses. É importante que o atendimento seja natural e autêntico.

Pergunta nº3

Paula Carvalho: - Qual era estratégia da cadeia hoteleira que representa relativamente ao desenvolvimento de pessoas para lidar com o mercado asiático, antes do Covid-19?

Existem políticas de melhoramento contínuo? Um departamento dedicado a estas políticas?

Participante nº3:

Sim temos integrado nos processos de controlo de qualidade. As políticas de melhoramento são coordenadas pelo departamento de Recursos Humanos.

Pergunta nº4

Paula Carvalho: - As escolas de hotelaria e turismo são uma boa fonte de profissionais para o sector de hotelaria?

Preferem recrutar pessoas com ou sem experiência em hotelaria?

Participante nº3:

As escolas de hotelaria e turismo são uma boa fonte de recrutamento. Algumas escolas têm iniciativas concertadas com o Turismo de Portugal relativamente ao mercado chinês. O problema é que quando falamos em mercado asiático, queremos dizer mercado chinês.

Para diretor de hotel recrutamos profissionais com experiência em hotelaria (fator eliminatório), para outros sectores poderão ter experiência em outros sectores. Por exemplo, para marketing o sector da distribuição tem bons profissionais experientes. Para cargos abaixo de direção o mais importante é a “atitude”, o resto poderemos treinar e formar.

Pergunta n°5

Paula Carvalho: - Formam os colaboradores em cultura asiática?

Participante n°3: - Não. A nossa formação foca-se em coisas básicas como “check-in” “check-out”.

Pergunta n°6

Paula Carvalho: - Na sua opinião, quais os mercados que irão retomar a atividade de forma prioritária, pós-covid?

Participante n°3: - Primeiramente, serão os mercados de proximidade, mercados europeus (França, Espanha, Itália, Reino Unido, Doméstico), o mercado asiático não será prioridade, pelo menos nos próximos 2 anos. Mercados distantes, penso que a prioridade será Brasil e Estados Unidos da América devido à maior proximidade e poder de compra.

Pergunta n°7

Paula Carvalho: - Na sua opinião, quais das seguintes dimensões serão mais prioritárias, pós-covid? Mercado e Clientes, Processos e Procedimentos, Desenvolvimento de Pessoas, Rentabilidade.

Participante n°3: - Comunicação e Vendas para mim é a prioridade, em segundo lugar olear as operações (procedimentos e processos), depois o desenvolvimento de pessoas e por último a rentabilidade que deverá ser uma consequência das outras três.

Pergunta n°8

Paula Carvalho: - Gostaria de adicionar algum comentário?

Participante n°3: - Tenho experiência anterior como diretor geral de operações numa cadeia de hotéis que possuí um hotel com estrela Michelin. É um hotel 5 estrelas exclusivo em que os clientes procuram uma experiência de luxo e qualidade. Recebemos alguns japonese que vieram em grupo através com base num acordo com um operador turístico.

Entrevista nº4

11-12-2020

Hora: 19h

Duração: 1h:08m

Experiência Profissional:

Diretora Comercial, Desenvolvimento de Negócio e Negócios “Corporate”

Agência de Viagens (sócio-gerente)

Experiência em Hotelaria: mais de 23 anos.

Pergunta nº1

Paula Carvalho: - Qual era estratégia da cadeia hoteleira que representa relativamente ao mercado asiático, antes do Covid-19?

Participante nº 4: - O mercado japonês está presente em Portugal há muitos anos, antes do mercado chinês. A agência de turismo oriental começou a trabalhar com o mercado japonês há 20 anos, assim como a agência espanhola Macani. Há uma tradição de que o mercado japonês é um mercado de grupos e não individual. O japonês gosta de se levantar cedo e ter tudo bem planeado e mais aberto que o chinês. O chinês é mais recente, a cadeia que representa criou há 4 anos atrás uma marca dedicada ao mercado chinês que se chama “Hualuxe”. Esta marca é dedicada apenas, a mercados asiáticos, não é global.

Durante a entrevista, verificamos no website www.ihg.com/hualuxe/hotels a filosofia “Hualuxe” como abaixo transcrito:

Hualuxe philosophy: “HUALUXE® is the first international luxury hotel brand from InterContinental Hotels Group tailored for Chinese guests. To our guests, HUALUXE® is the Chinese hospitality solution underpinned by internationally renowned consistency that’s supported by four principles; chinese etiquette, status recognition, rejuvenation with nature, and enabling spaces. The Business Elite will feel and be seen to truly accomplished at HUALUXE®, where they enjoy the success of business gatherings and social events. HUALUXE® is dedicated to providing thoughtfully designed spaces and exceptionally attentive services to the Business Elite. Enjoy a professional settings for business discussions or to entertain clients.”

“HUALUXE® Brand Mind

HUALUXE® deeply understands the needs of Chinese merchants for business and social contact and is committed to providing a mature and perfect social space. Relying on our world-renowned excellent management system, we enthusiastically promote the Chinese hospitality with "propriety", "respect" and "generosity" as our core values, so that "social talents", together with their business partners or family and friends, have a pleasant experience with everything here!”

“Chinese Etiquette

We care for our guests with our warm and considerate services. Inside and outside of our hotel, the epitome of elegant Chinese etiquette can be seen everywhere. With the bow greetings for welcoming and seeing off our guests, each time when we contact with our guests is highlighted with our salute to high standards. In addition, it is our tribute to Chinese culture and habits by providing tea and night snacks highly appreciated by the Chinese people, which also shows HUALUXE®'s kind hospitality.”

“Status Recognition

HUALUXE® Hotels and Resorts is well versed in the importance of being steeped in propriety and being respectful to guests. With our unique VIP reception hall and exclusive catering butlers, all are designed to enable our guests to enjoy VIP treatment during their stay.

Rejuvenation In Nature

HUALUXE® Hotels & Resorts stays true to the design philosophy of “close to nature yet luxurious”. From the garden lobby to the resort-style bathroom, every part of the hotel is rejuvenating to guests’ mind and body.

Enabling Spaces

HUALUXE® is well aware of the delicate needs of Chinese merchants for business and social contact and provides a range of mature and perfect spaces for business banquets, private parties, relaxed private business meetings, including HUALUXE®'s most distinctive "LUXE tea" and "LUXE gathering". It absolutely will become a perfect place for merchants to seek success and consensus.”

Não existe uma estratégia dedicada aos japoneses por motivos de política. Os chineses são uma oportunidade numerosa com expectativas de crescimento maior que o mercado japonês.

O mercado asiático era importante, mas o mercado asiático mais consolidado no passado e ligado a certas empresas japonesas representadas em Portugal como a Salvador Caetano, Yasaki Saltano mas, o mercado japonês não tem grandes oportunidades de crescimento, o chinês tem. O seu marido está a aprender mandarim e jovens penso aprender Mandarim mas não japonês. O mercado chinês irá dominar o mundo no futuro, o japonês não.

Os japoneses que a participante conhece viajam em grupo e são pessoas idosas, excluindo os que viajam em negócio.

Os japoneses não viajam sozinhos como os chineses e apenas tem tempo para viajar após a reforma. Não vê japoneses jovens a viajar, nem com 90 anos, mas sim entre os 60 e os 80 anos e sempre em grupo. Os chineses estiveram fechados ao mundo então querem conhecer novos mundos. Tem uma irmã a viver em Londres que acha que os japoneses gostam de conversar e trocar ideias, os chineses não. No entanto, os chineses mesmo que não saibam inglês aventuram-se a viajar na mesma.

Há muito poucas agências de viagens que trabalham o mercado japonês. Não há visão estratégica para o mercado japonês.

Pergunta nº2

Paula Carvalho: - Qual era estratégia da cadeia hoteleira que representa relativamente a produtos, processos e procedimentos dedicados ao mercado asiático, antes do Covid-19?

Participante nº 4: Esteve presente numa conferência com o Turismo de Portugal, em que se chegou à conclusão que a recuperação do turismo deveria ser feita através de produtos sustentáveis. O mercado japonês é como o mercado judaico, o Turismo de Portugal faz um “tour” e é só pois, é um nicho de mercado. Em Portugal há poucas pessoas que entendem o mercado japonês ou chinês. Os chineses são muito desconfiados, difíceis de conquistar. O japonês é mais fácil de lidar. Em Espanha tem várias entidades a lidar com mercados asiáticos (Japonês, chinês, coreano), de formas diferentes, não é como Portugal.

Neste momento, Portugal tem muitos hotéis novos. Quando começou a sua atividade na hotelaria, no Porto só existiam 5 hotéis de 5 estrelas, hoje existem hotéis de 4 estrelas com preços de 5 estrelas. Portugal não tem estratégia.

Pergunta n°3

Paula Carvalho: - Qual era estratégia da cadeia hoteleira que representa relativamente ao desenvolvimento de pessoas para lidar com o mercado asiático, antes do Covid-19?

Existem políticas de melhoramento contínuo? Um departamento dedicado a estas políticas?

Participante n°4: - Se tiver por exemplo no “front office” um colaborador chinês terei retorno do investimento mais rapidamente, do que se apostar num japonês ou treinar um português. Por isso, é que a cadeia tem programas dedicados só para chineses. Os espanhóis dominam o mercado chinês pois, tem uma colónia chinesa grande. Portugal só atrai chineses através do “golden visa.”

Pergunta n°4

Paula Carvalho: - As escolas de hotelaria e turismo são uma boa fonte de profissionais para o sector de hotelaria?

Preferem recrutar pessoas com ou sem experiência em hotelaria?

Participante n°4: - Sim as escolas de hotelaria são uma boa fonte de recrutamento, mas não preparam os alunos para lidar com o mercado asiático.

Para as posições de direção preferimos pessoas com experiência em hotelaria, para posições abaixo de hotelaria poderão ter ou não experiência em hotelaria.

Pergunta n°5

Paula Carvalho: - Formam os colaboradores em cultura asiática?

Participante n°4: - Como referido antes, o grupo tem foco no mercado chinês.

Pergunta n°6

Paula Carvalho: - Na sua opinião, quais os mercados que irão retomar a atividade de forma prioritária pós-covid?

Participante n°4: - O primeiro mercado a retomar será o “mercado da saudade”, os emigrantes portugueses. Canada agita bastante o “mercado da saudade”. Os voos serão um problema, mas por vezes há que forçar a existência dos voos de necessidade.

Não é a aviação que depende do turismo, mas sim o turismo que depende da aviação. A participante tinha estado nos escritórios da Lufthansa no dia anterior e eles estavam a sentir procura não apenas relativamente aos portugueses que queriam regressar a Portugal, mas também dos estrangeiros que trabalham em Portugal e queriam regressar aos seus países, pagando o que fosse necessário para obter o voo.

Pergunta n°7

Paula Carvalho: - Na sua opinião, quais das seguintes dimensões serão mais prioritárias, pós-covid? Mercado e Clientes, Processos e Procedimentos, Desenvolvimento de Pessoas, Rentabilidade.

Participante n°4: - Todas as dimensões serão importantes.

Pergunta n°8

Paula Carvalho: - Gostaria de adicionar algum comentário?

Participante n°4: - Relativamente ao mercado japonês, há uma lacuna na estratégia do Trismo de Portugal. O mercado não é trabalhado. Em geral não há uma cultura de longo prazo em Portugal. Se por exemplo, os autocarros deixarem de poder circular na cidade, os hotéis não poderão receber os grupos de turistas que geralmente chegam de autocarro aos hotéis.

Participante nº5

22-12-2020

Hora: 14h:00m

Duração: 40 minutes

Tipo: Conferência WhatsApp

Experiência Profissional:

Professora Universitária – Coordenadora de Programas em Hotelaria e Turismo.

Experiência em Hotelaria: Mais de 18 anos.

Pergunta nº1

Paula Carvalho: - Qual era estratégia para a Universidade que representa relativamente ao mercado asiático, antes do Covid-19?

Participante nº5: - O mercado asiático é importante para Portugal mas, a universidade não tem programas específicos para estes mercados. Algumas iniciativas existem, levadas a cabo pelo Turismo de Portugal.

Pergunta nº2

Paula Carvalho: - Na sua opinião, qual era estratégia das cadeias hoteleiras relativamente aos processos e procedimentos para o mercado asiático, antes do Covid-19?

Participante nº5: - Tem processos standard sem distinção para o mercado asiático.

Pergunta nº3

Paula Carvalho: - Qual era estratégia das cadeias hoteleiras relativamente ao desenvolvimento de pessoas para lidar com o mercado asiático, antes do Covid-19?

Existem políticas de melhoramento contínuo? Um departamento dedicado a estas políticas?

Participante nº5: - Sem opinião sobre o assunto.

Pergunta nº4

Paula Carvalho: - As escolas de hotelaria e turismo são uma boa fonte de profissionais para o sector de hotelaria?

Participante nº5: - Sim são, mas não têm cadeiras dedicadas às diferentes culturas dos clientes, incluindo asiáticos. Poderão ser abordados alguns assuntos sobre diferenças culturais em cadeiras que incluem temas de marketing e satisfação do cliente.

Pergunta n°5

Paula Carvalho: - Formam os professores em cultura asiática?

Participante n°5: - Não.

Pergunta n°6

Paula Carvalho: - Na sua opinião, quais os mercados que irão retomar a atividade de forma prioritária pós-covid?

Participante n°5: - Mercados europeus pela proximidade e facilidade.

Pergunta n°7

Paula Carvalho: - Na sua opinião, quais das seguintes dimensões serão mais prioritárias para as cadeias hoteleiras pós-covid? Mercado e Clientes, Processos e Procedimentos, Desenvolvimento de Pessoas, Rentabilidade.

Participante n°5: - Sem opinião sobre o assunto.

Pergunta n°8

Paula Carvalho: - Gostaria de adicionar algum comentário?

Participante n°5: - Existem oportunidades de crescimento no mercado asiático, turismo Halal e mercado de leste. Deverá se pensar em estratégias bem definidas analisando o perfil do segmento turístico a receber e direcionar o produto turístico para responder às necessidades do cliente.

A grande atração dos turistas Japoneses pelo mercado espanhol poderá estar ligada ao facto de Espanha ter lançado campanhas de "...tienda del mundo", colocando destinos como Madrid e Barcelona no Top das cidades mais procuradas para turismo de shopping. Atraindo turistas com grande poder de compra como os japoneses, fazendo com que os gastos por viagem sejam muito significativos e dinamizando as marcas espanholas e também a economia como um todo.

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Appendix F – AMOS Output

Estimates (Group number 1 - Default model)

Scalar Estimates (Group number 1 - Default model)

Maximum Likelihood Estimates

Regression Weights: (Group number 1 - Default model)

			Estimate	S.E.	C.R.	P	Label
Q13_3	<--	People1_AsiaticTraining	1,000				
Q13_2	<---	People1_AsiaticTraining	1,002	,021	47,788	***	W1
Q13_1	<---	Peple1_AsiaticTraining	,808	,033	24,652	***	W2
Q6_4	<---	Market_Importance	1,000				
Q6_3	<---	Market_Importance	,985	,056	17,545	***	W3
Q6_2	<---	Market_Importance	,980	,047	21,005	***	W4
Q6_1	<---	Market_Importance	,780	,049	15,842	***	W5
Q11_6	<---	People2_FrontOffice_Compences	1,000				
Q11_4	<---	People2_FrontOffice_Compences	,727	,051	14,365	***	W7
Q14_3	<---	Finance_Profitability	1,000				
Q14_2	<---	Finance_Profitability	,926	,045	20,461	***	W9
Q14_1	<---	Finance_Profitability	,997	,037	26,822	***	W10
Q10_8	<---	PP1_General_Procedures	1,000				
Q10_7	<---	PP1_General_Procedures	,881	,068	13,031	***	W11
Q10_6	<---	PP1_General_Procedures	,599	,042	14,376	***	W12
Q10_5	<---	PP1_General_Procedures	,894	,065	13,760	***	W13
Q10_4	<---	PP1_General_Procedures	,737	,057	12,830	***	W14

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			Estimate	S.E.	C.R.	P	Label
Q10_2	<---	PP1_General_Procedures	1,003	,074	13,566	***	W15
Q13_7	<---	People3_Continuous_Improvement	1,000				
Q13_6	<---	People3_Continuous_Improvement	,811	,034	23,829	***	W16
Q13_5	<---	People3_Continuous_Improvement	,798	,033	23,995	***	W17
Q13_4R	<---	PP2_Procedures_Customer	1,000				
Q10_1REC	<---	PP2_Procedures_Customer	,979	,147	6,642	***	W18
Q11_5	<---	People2_FrontOffice_Competerences	1,020	,042	24,285	***	W6

Standardized Regression Weights: (Group number 1 - Default model)

			Estimate
Q13_3	<---	People1_AsianTraining	,987
Q13_2	<---	People1_AsianTraining	,985
Q13_1	<---	People1_AsianTraining	,904
Q6_4	<---	Market_Importance	,837
Q6_3	<---	Market_Importance	,877
Q6_2	<---	Market_Importance	,934
Q6_1	<---	Market_Importance	,836
Q11_6	<---	People2_FrontOffice_Competerences	,916
Q11_4	<---	People2_FrontOffice_Competerences	,788
Q14_3	<---	Finance_Profitability	,918
Q14_2	<---	Finance_Profitability	,919
Q14_1	<---	Finance_Profitability	,978
Q10_8	<---	PP1_General_Procedures	,846
Q10_7	<---	PP1_General_Procedures	,832
Q10_6	<---	PP1_General_Procedures	,784
Q10_5	<---	PP1_General_Procedures	,821
Q10_4	<---	PP1_General_Procedures	,748
Q10_2	<---	PP1_General_Procedures	,770
Q13_7	<---	People3_Continuous_Improvement	,958
Q13_6	<---	People3_Continuous_Improvement	,914
Q13_5	<---	People3_Continuous_Improvement	,916
Q13_4R	<---	PP2_Procedures_Customer	,860
Q10_1REC	<---	PP2_Procedures_Customer	,697
Q11_5	<---	People2_FrontOffice_Competerences	,962

Intercepts: (Group number 1 - Default model)

	Estimate	S.E.	C.R.	P	Label
Q13_3	3,684	,078	47,010	***	par_57
Q13_2	3,666	,079	46,556	***	par_58
Q13_1	3,805	,069	54,769	***	par_59
Q6_4	3,964	,092	43,315	***	par_60
Q6_3	4,052	,085	47,596	***	par_61
Q6_2	4,191	,079	53,054	***	par_62
Q6_1	4,207	,070	59,804	***	par_63
Q11_6	3,997	,083	47,882	***	par_64
Q11_5	4,038	,081	49,996	***	par_65
Q11_4	4,077	,071	57,403	***	par_66
Q14_3	4,038	,087	46,210	***	par_67
Q14_2	3,979	,080	49,512	***	par_68
Q14_1	4,100	,080	51,066	***	par_69
Q10_8	4,154	,089	46,495	***	par_70
Q10_7	4,079	,089	45,707	***	par_71
Q10_6	4,642	,057	80,763	***	par_72
Q10_5	4,132	,088	47,002	***	par_73
Q10_4	4,092	,075	54,541	***	par_74
Q10_2	3,775	,099	38,059	***	par_75
Q13_7	4,467	,079	56,650	***	par_76
Q13_6	4,533	,067	67,549	***	par_77
Q13_5	4,552	,066	69,095	***	par_78
Q13_4R	3,037	,090	33,719	***	par_79
Q10_1REC	3,090	,107	28,764	***	par_80

Covariances: (Group number 1 - Default model)

		Esti- mate	S.E.	C.R.	P	Label
People1_AsianTraining	<-- People2_FrontOf- > fice_Competerces	,418	,062	6,764	***	C2
People1_AsianTraining	<-- Finance_Profitability >	,474	,059	7,979	***	C3
People1_AsianTraining	<-- PP1_General_Proce- > dures	,664	,044	15,180	***	C4
People1_AsianTraining	<-- People3_Continu- > ous_Improvement	,527	,053	9,973	***	C5
Market_Importance	<-- People2_FrontOf- > fice_Competerces	,569	,052	10,943	***	C7
Market_Importance	<-- Finance_Profitability >	,785	,033	23,820	***	C8
Market_Importance	<-- PP1_General_Proce- > dures	,694	,042	16,376	***	C9

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			Esti- mate	S.E.	C.R.	P	Label
Market_Importance	<--	People3_Continu- > ous_Improvement	,669	,042	15,781	***	C10
People2_FrontOf- fice_Compences	<--	Finance_Profitability	,660	,045	14,722	***	C12
People2_FrontOf- fice_Compences	<--	PP1_General_Proce- > dures	,698	,041	16,840	***	C13
People2_FrontOf- fice_Compences	<--	People3_Continu- > ous_Improvement	,674	,041	16,540	***	C14
People1_AsianTraining	<--	Market_Importance	,559	,053	10,607	***	par_53
Finance_Profitability	<--	PP1_General_Proce- > dures	,736	,039	18,710	***	par_54
PP1_General_Procedures	<--	People3_Continu- > ous_Improvement	,864	,024	36,122	***	par_55
Finance_Profitability	<--	People3_Continu- > ous_Improvement	,716	,038	18,658	***	par_56

Correlations: (Group number 1 - Default model)

		Estimate	
People1_AsianTraining	<-->	People2_FrontOffice_Compences	,418
People1_AsianTraining	<-->	Finance_Profitability	,474
People1_AsianTraining	<-->	PP1_General_Procedures	,664
People1_AsianTraining	<-->	People3_Continuous_Improvement	,527
Market_Importance	<-->	People2_FrontOffice_Compences	,569
Market_Importance	<-->	Finance_Profitability	,785
Market_Importance	<-->	PP1_General_Procedures	,694
Market_Importance	<-->	People3_Continuous_Improvement	,669
People2_FrontOffice_Compences	<-->	Finance_Profitability	,660
People2_FrontOffice_Compences	<-->	PP1_General_Procedures	,698
People2_FrontOffice_Compences	<-->	People3_Continuous_Improvement	,674
People1_AsianTraining	<-->	Market_Importance	,559
Finance_Profitability	<-->	PP1_General_Procedures	,736
PP1_General_Procedures	<-->	People3_Continuous_Improvement	,864
Finance_Profitability	<-->	People3_Continuous_Improvement	,716

Squared Multiple Correlations: (Group number 1 - Default model)

	Estimate
Q10_1REC	,486
Q13_4R	,740
Q13_5	,839
Q13_6	,836
Q13_7	,918
Q10_2	,592
Q10_4	,560
Q10_5	,674
Q10_6	,615
Q10_7	,692
Q10_8	,715
Q14_1	,956
Q14_2	,845
Q14_3	,843
Q11_4	,621
Q11_5	,925
Q11_6	,838
Q6_1	,699
Q6_2	,872
Q6_3	,768
Q6_4	,701
Q13_1	,817
Q13_2	,970
Q13_3	,973

Model Fit Summary

CMIN

Model	NPAR	CMIN	DF	P	CMIN/DF
Default model	80	518,486	244	,000	2,125
Saturated model	324	,000	0		
Independence model	24	2171,223	300	,000	7,237

Baseline Comparisons

Model	NFI Delta1	RFI rho1	IFI Delta2	TLI rho2	CFI
Default model	,761	,706	,858	,820	,853
Saturated model	1,000		1,000		1,000
Independence model	,000	,000	,000	,000	,000

Parsimony-Adjusted Measures

Model	PRATIO	PNFI	PCFI
Default model	,813	,619	,694
Saturated model	,000	,000	,000
Independence model	1,000	,000	,000

NCP

Model	NCP	LO 90	HI 90
Default model	274,486	212,819	343,903
Saturated model	,000	,000	,000
Independence model	1871,223	1726,989	2022,882

FMIN

Model	FMIN	F0	LO 90	HI 90
Default model	2,788	1,476	1,144	1,849
Saturated model	,000	,000	,000	,000
Independence model	11,673	10,060	9,285	10,876

RMSEA

Model	RMSEA	LO 90	HI 90	PCLOSE
Default model	,078	,068	,087	,000
Independence model	,183	,176	,190	,000

Regression Weights: (Group number 1 - Default model)

		Esti- mate	S.E.	C.R.	P	Label
Strategy	<--- People2_FrontOffice_Competences	,272	,141	1,930	,054	par_58
Strategy	<--- People3_Continuous_Improvement	-,516	,222	-2,326	,020	par_59
Strategy	<--- Market_Importance	,079	,172	,459	,646	par_60
Strategy	<--- People1_AsianTraining	,078	,133	,583	,560	par_61
Strategy	<--- PP1_General_Procedures	,190	,276	,687	,492	par_62
Strategy	<--- PP2_Procedures_Customer	-,087	,099	-,885	,376	par_63
Strategy	<--- Finance_Profitability	,374	,185	2,020	,043	par_64
Q13_3	<--- People1_AsianTraining	1,000				
Q13_2	<--- People1_AsianTraining	1,001	,021	47,751	***	W1
Q13_1	<--- People1_AsianTraining	,808	,033	24,652	***	W2
Q6_4	<--- Market_Importance	1,000				
Q6_3	<--- Market_Importance	,985	,056	17,555	***	W3
Q6_2	<--- Market_Importance	,977	,047	20,942	***	W4
Q6_1	<--- Market_Importance	,782	,049	15,894	***	W5

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			Esti- mate	S.E.	C.R.	P	Label
Q11_6	<---	People2_FrontOffice_Competences	1,000				
Q11_4	<---	People2_FrontOffice_Competences	,731	,051	14,471	***	W7
Q14_3	<---	Finance_Profitability	1,000				
Q14_2	<---	Finance_Profitability	,923	,045	20,328	***	W9
Q14_1	<---	Finance_Profitability	1,001	,037	27,046	***	W10
Q10_8	<---	PP1_General_Procedures	1,000				
Q10_7	<---	PP1_General_Procedures	,887	,068	13,143	***	W11
Q10_6	<---	PP1_General_Procedures	,595	,042	14,279	***	W12
Q10_5	<---	PP1_General_Procedures	,892	,065	13,712	***	W13
Q10_4	<---	PP1_General_Procedures	,731	,058	12,705	***	W14
Q10_2	<---	PP1_General_Procedures	1,006	,074	13,607	***	W15
Q13_7	<---	People3_Continuous_Improvement	1,000				
Q13_6	<---	People3_Continuous_Improvement	,812	,034	23,841	***	W16
Q13_5	<---	People3_Continuous_Improvement	,801	,033	24,144	***	W17
Q13_4R	<---	PP2_Procedures_Customer	1,000				
Q10_1REC	<---	PP2_Procedures_Customer	,997	,148	6,719	***	W18
Q11_5	<---	People2_FrontOffice_Competences	1,011	,042	24,053	***	W6
Q14_6	<---	Strategy	1,000				
Q14_7	<---	Strategy	1,086	,141	7,691	***	par_57

Standardized Regression Weights: (Group number 1 - Default model)

			Estimate
Strategy	<---	People2_FrontOffice_Competences	,514
Strategy	<---	People3_Continuous_Improvement	-,974
Strategy	<---	Market_Importance	,149
Strategy	<---	People1_AsianTraining	,147
Strategy	<---	PP1_General_Procedures	,359
Strategy	<---	PP2_Procedures_Customer	-,165
Strategy	<---	Finance_Profitability	,707
Q13_3	<---	People1_AsianTraining	,987
Q13_2	<---	People1_AsianTraining	,985
Q13_1	<---	People1_AsianTraining	,903
Q6_4	<---	Market_Importance	,837
Q6_3	<---	Market_Importance	,877
Q6_2	<---	Market_Importance	,933
Q6_1	<---	Market_Importance	,837
Q11_6	<---	People2_FrontOffice_Competences	,917

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			Estimate
Q11_4	<---	People2_FrontOffice_Competerences	,791
Q14_3	<---	Finance_Profitability	,918
Q14_2	<---	Finance_Profitability	,918
Q14_1	<---	Finance_Profitability	,979
Q10_8	<---	PP1_General_Procedures	,846
Q10_7	<---	PP1_General_Procedures	,835
Q10_6	<---	PP1_General_Procedures	,782
Q10_5	<---	PP1_General_Procedures	,820
Q10_4	<---	PP1_General_Procedures	,745
Q10_2	<---	PP1_General_Procedures	,771
Q13_7	<---	People3_Continuous_Improvement	,957
Q13_6	<---	People3_Continuous_Improvement	,915
Q13_5	<---	People3_Continuous_Improvement	,918
Q13_4R	<---	PP2_Procedures_Customer	,854
Q10_1REC	<---	PP2_Procedures_Customer	,708
Q11_5	<---	People2_FrontOffice_Competerences	,958
Q14_6	<---	Strategy	,521
Q14_7	<---	Strategy	,534

Intercepts: (Group number 1 - Default model)

	Estimate	S.E.	C.R.	P	Label
Q13_3	3,685	,078	47,029	***	par_66
Q13_2	3,666	,079	46,582	***	par_67
Q13_1	3,805	,069	54,792	***	par_68
Q6_4	3,964	,091	43,327	***	par_69
Q6_3	4,052	,085	47,602	***	par_70
Q6_2	4,191	,079	53,131	***	par_71
Q6_1	4,207	,070	59,769	***	par_72
Q11_6	3,998	,083	47,969	***	par_73
Q11_5	4,038	,080	50,238	***	par_74
Q11_4	4,077	,071	57,350	***	par_75
Q14_3	4,037	,087	46,190	***	par_76
Q14_2	3,977	,080	49,566	***	par_77
Q14_1	4,098	,080	50,941	***	par_78
Q10_8	4,154	,089	46,516	***	par_79
Q10_7	4,079	,089	45,627	***	par_80
Q10_6	4,642	,057	80,972	***	par_81
Q10_5	4,132	,088	47,072	***	par_82
Q10_4	4,092	,075	54,713	***	par_83
Q10_2	3,775	,099	38,038	***	par_84
Q13_7	4,467	,079	56,605	***	par_85
Q13_6	4,533	,067	67,541	***	par_86
Q13_5	4,552	,066	68,930	***	par_87

	Estimate	S.E.	C.R.	P	Label
Q13_4R	3,037	,091	33,476	***	par_88
Q10_1REC	3,090	,108	28,685	***	par_89
Q14_6	3,238	,102	31,738	***	par_90
Q14_7	3,189	,108	29,563	***	par_91

Covariances: (Group number 1 - Default model)

			Esti- mate	S.E.	C.R.	P	Label
People1_AsianTrain- ing	<-->	People2_FrontOf- fice_Competerences	,417	,062	6,744	***	C2
People1_AsianTrain- ing	<-->	Finance_Profitabil- ity	,475	,059	8,007	***	C3
People1_AsianTrain- ing	<-->	PP1_General_Pro- cedures	,664	,044	15,144	***	C4
People1_AsianTrain- ing	<-->	People3_Continu- ous_Improvement	,526	,053	9,951	***	C5
Market_Importance	<-->	People2_FrontOf- fice_Competerences	,568	,052	10,883	***	C7
Market_Importance	<-->	Finance_Profitabil- ity	,786	,033	23,954	***	C8
Market_Importance	<-->	PP1_General_Pro- cedures	,694	,042	16,365	***	C9
Market_Importance	<-->	People3_Continu- ous_Improvement	,669	,042	15,765	***	C10
People2_FrontOf- fice_Competerences	<-->	Finance_Profitabil- ity	,662	,045	14,805	***	C12
People2_FrontOf- fice_Competerences	<-->	PP1_General_Pro- cedures	,697	,042	16,736	***	C13
People2_FrontOf- fice_Competerences	<-->	People3_Continu- ous_Improvement	,674	,041	16,488	***	C14
People1_AsianTrain- ing	<-->	Market_Im- portance	,560	,053	10,655	***	par_53
Finance_Profitability	<-->	PP1_General_Pro- cedures	,732	,040	18,517	***	par_54
PP1_General_Proce- dures	<-->	People3_Continu- ous_Improvement	,863	,024	36,000	***	par_55
Finance_Profitability	<-->	People3_Continu- ous_Improvement	,713	,039	18,474	***	par_56
e27	<-->	e28	,595	,111	5,360	***	par_65

Correlations: (Group number 1 - Default model)

			Estimate
People1_AsianTraining	<-->	People2_FrontOffice_Competerences	,417
People1_AsianTraining	<-->	Finance_Profitability	,475
People1_AsianTraining	<-->	PP1_General_Procedures	,664
People1_AsianTraining	<-->	People3_Continuous_Improvement	,526
Market_Importance	<-->	People2_FrontOffice_Competerences	,568
Market_Importance	<-->	Finance_Profitability	,786
Market_Importance	<-->	PP1_General_Procedures	,694
Market_Importance	<-->	People3_Continuous_Improvement	,669
People2_FrontOffice_Competerences	<-->	Finance_Profitability	,662
People2_FrontOffice_Competerences	<-->	PP1_General_Procedures	,697
People2_FrontOffice_Competerences	<-->	People3_Continuous_Improvement	,674
People1_AsianTraining	<-->	Market_Importance	,560
Finance_Profitability	<-->	PP1_General_Procedures	,732
PP1_General_Procedures	<-->	People3_Continuous_Improvement	,863
Finance_Profitability	<-->	People3_Continuous_Improvement	,713
e27	<-->	e28	,754

Squared Multiple Correlations: (Group number 1 - Default model)

	Estimate
Q14_7	,285
Q14_6	,271
Q10_1REC	,501
Q13_4R	,729
Q13_5	,842
Q13_6	,836
Q13_7	,916
Q10_2	,594
Q10_4	,555
Q10_5	,672
Q10_6	,612
Q10_7	,697
Q10_8	,716
Q14_1	,959
Q14_2	,842
Q14_3	,843
Q11_4	,626
Q11_5	,919
Q11_6	,841
Q6_1	,701
Q6_2	,870
Q6_3	,769
Q6_4	,701

	Estimate
Q13_1	,816
Q13_2	,969
Q13_3	,974

Model Fit Summary

CMIN

Model	NPAR	CMIN	DF	P	CMIN/DF
Default model	93	605,995	284	,000	2,134
Saturated model	377	,000	0		
Independence model	26	2366,123	351	,000	6,741

Baseline Comparisons

Model	NFI Delta1	RFI rho1	IFI Delta2	TLI rho2	CFI
Default model	,744	,683	,845	,803	,840
Saturated model	1,000		1,000		1,000
Independence model	,000	,000	,000	,000	,000

Parsimony-Adjusted Measures

Model	PRATIO	PNFI	PCFI
Default model	,809	,602	,680
Saturated model	,000	,000	,000
Independence model	1,000	,000	,000
Independence model	12,721	10,834	10,026

RMSEA

Model	RMSEA	LO 90	HI 90	PCLOSE
Default model	,078	,069	,087	,000
Independence model	,176	,169	,182	,000