Accommodation's difficulties and attitude towards inbound tourism in Japan's rural heritage destinations

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（Abstract）

The inbound tourism industry is experiencing a rapid growth period with overtourism in certain main tourism hubs (Kerr, 2019), leading to overcrowded traffic situations (Ryder, 2019) and a negative impression on residents (Reid & Ek, 2020). The tourism industry as a whole is designated as an important part of Japan's economy, and a key point in reviving the rural communities experiencing depopulation and ageing society.

Accommodations need to follow the change, with an investment of resources into services, human recourses and amenities desired by foreign tourists. This change is difficult for rural Japanese accommodations, with a lack of workforce and tools for development.

This paper aims to gather information on what kind of problems accommodations in rural heritage destinations face in Japan and to assess their overall attitude towards inbound tourisms and the foreigner tourist.

Results show that the lack of workforce and foreign language speak workforce is one of the most severe problems of rural accommodations. Attitude towards inbound tourism is generally positive, with a moderate level of concerns of communication difficulties, manner problems and similar problems that can come up in an intercultural exchange.

The local governments need to address the lack of workforce and provide possibilities and aid to entrepreneurs, as creating a multilingual facility environment in rural communities is possible more difficult than in tourism hubs. While the establishments are looking positively forward to foreign tourists, the managers don't feel that the 2020 Tokyo 2020 Olympic Games will have a significant impact on their businesses.

Keywords: inbound, rural, heritage destination, accommodation survey, attitude survey

1. Introduction

The government has designated the tourism industry as one of the main pillars of Japan's economy, but the sector faces difficulties both on the supply and demand side. Ageing society poses a threat to the sustainability of the tourism industry, as destinations, especially in rural areas, face ageing and depopulation, which leads to shrinking and an ageing workforce. The ageing society also has an impact on the supply side, as leisure patterns and spending changes, creating a double-sided problem, where both the supply and demand is rapidly changing.

The fast-growing inbound tourism can ease the problems of the demand side, as an increase of foreign tourists improves the accommodation industry's productivity, not just by

raising the demand, but also by "demand-smoothing" (Morikawa, 2017). Although on the national level, the tourism industry is benefiting from inbound tourism, there is a significant geographical concentration of foreign tourists (Tanaka, 2013). The major tourist hubs are often used as case studies for overtourism research, with resident attitude surveys gathering data on the negative impact of increasing foreign tourists (Sano & Nan, 2020), and international conferences on the subject (Johnston, 2019). However, there is also a need to investigate the impact of inbound tourism on rural heritage destinations. While the difficulties that rural communities and tourism industry stakeholders face are different from those of more significant hubs, the service development they have to achieve is similar.

The inbound boom creates a situation where tourism industry members have to start investing in a foreign-friendly environment. The accommodation industry members are already making their first step, with foreign language speaking staff, catering to the needs of the guest of different religious and cultural background and allergies and with employing foreigners as staff (Morishita, 2019).

These investments into services, foreign language speaking staff, multilingual signs and information, together with concerns of intercultural communication problems, can pose a difficulty to the industry members especially in rural destinations where resources, both material and workforce, is scarce.

This research aims to gather information on difficulties of accommodations in heritage destinations, with a special emphasis on inbound tourism. The chosen destinations are Ojika (Nagasaki Pref.), Tsuwano (Shimane Pref.), Hagi (Yamaguchi Pref.), Onomichi (Hiroshima Pref.), Shimonoseki (Yamaguchi Pref.), Kurashiki (Okayama Pref.) and Takayama (Gifu Pref.). These destinations have a UNESCO World Heritage designation or a Japan Heritage designation, which strengthens their brand as a heritage destination and creates a potential for inbound tourism growth.

The paper is divided into sections as follows. Section 2 is introducing a literature review of the inbound tourism with tourism experience and tourism industry workforce in focus. Section 3 details the research method and introduces the questionnaire. The results of the survey are analysed in Section 4, and the summary and conclusion are given in Section 5.

2. Literature Review

The accommodation sector faces difficulties, as an ageing society will both impact the domestic demand and the available workforce, especially in rural destinations. The importance of inbound tourism is described in the following sections, as well as the change in the service an establishment has to offer to have satisfied foreign guests.

Furthermore, the interaction between host and guest is important to understand the environment and difficulties of accommodations and to prepare a well-structured survey, the

questions have to be based on some kind of previous information. Government agencies have already conducted numerous surveys on the experience and troubles foreigners have in Japan, and have used the results to start improving their experience. These results can also be used to investigate the host's side of the process since the guest experience is closely connected to the environment created by the host, the accommodations. The following results show communication as one of the main issues that have to be addressed.

2.1 Foreigner's difficulties during the trip

Smartphones and other interactive tools of communication during the trip to Japan can help the foreigners, and multilingual landscape has developed in the past years. However, there are still significant problems that foreigners encounter while in Japan.

A survey was carried out by the, a continuation of two previous similar surveys. The last survey also had a follow-up question part, with topics selected as problems by the tourist in previous years. In the first year of 2014, "free public Wi-Fi" was the main problem faced by the tourists at 30.2%, but gradually this problem seems to be less severe.

The problem of access to public Wi-Fi seems to have peaked in 2014, as from the 30.2% of the first year it gradual went down in 2016 and 2017 to 18.5% and 13.7% respectively (JTA, 2017b, 2018b).

Inconvenience during travel (SRQ)				
	2014	2016	2018	
Free Public Wi-Fi	30.2%	18.5%	13.7%	Free Public Wi-Fi
Communication problems	21.1%	28.9%	23.5%	Communication problems with facility staff
Multilingual signs (Tourism information signs, etc.)	4.7%	13.3%	13.2%	Insufficient and hard to understand multilingual signs (tourism information, maps, etc.)
Insufficient places to get multilingual pamphlets, maps	3.1%			
Difficult to understand multilingual signs	2.0%			
Information on boarding public transport (trains, busses)	1.7%	11.1%	12.7%	Using public transport
Information on use of public transport (connection included)	4.9%	3.7%	5.5%	Using discount train tickets
Credit and debit cards acceptance	2.6%	4.3%	5.8%	Credit and debit cards acceptance
Reservations in restaurants and accommodations	1.3%	2.4%	3.1%	Obtaining information and reservation in restaurants and accommodations
Obtaining information on restaurants and accommodations	1.2%			

Table 1: Inconvenience during travel (compiled by the author from MLIT Japan Tourism Agency, 2017, 2018)

This result is connected to the rising number of mobile Wi-Fi rentals at airports and many internet hotspots at tourism destinations and attractions. Communication has been selected from 21.1% to 28.9% to 23.5% in the survey as difficulty during the trip. The main topic of this paper, the accommodations, were in the lower segment with growing importance from 2.6% in 2014 to 3.1% in 2017 (JTA, 2017b, 2018b).

2.1.1 Communication problems

The surveys in 2016 and 2017 also contain more detailed questions on the communication troubles experienced during the trip. This focus is most likely because from 2014 to 2016, the number of tourists selecting communication as a problem increased from an already high percentage.

The first question connected to the communication problem focuses on the place wherein the difficulty was experienced, with respondents asked in main cities (Tokyo, Nagoya, Kyoto and Osaka) and outside of these cities. In both groups, "Restaurants and retail establishments" was selected as the group of places presenting the most significant difficulty with communication. This is followed by "train stations and terminals" and "accommodations" in a different order depending on the location of the survey.

Communication problems with the facility staff (MRQ)	Main cities (Tokyo, Nagoya, Kyoto, Osaka)		Outside of the main cities	
Restaurants and retail establishments	I	23.1%	I	18.2%
Castles, Shinto Shrines and Buddhist Temples		8.7%		7.0%
Train stations and terminals	II	12.2%	III	7.7%
Art and history museums		5.8%		5.7%
On trains		6.7%		4.9%
Accommodations	III	8.9%	II	8.0%
Bus terminals		5.9%		5.3%
Taxis		7.0%		5.1%
On board a bus		5.2%		4.5%
		n=4284		N=2665

Table 2: Communication problems (compiled by the author from MLIT JTA 2016)

In the 2016 survey, the restaurants and retail industry were linked together into one category, making it difficult for the tourism industry stakeholders to determine where to improve. The survey of 2017 (published in 2018) already separates these two types of spaces into two categories, although reducing the number of possible answers. The results of this multiple response questions show that restaurants were selected by 28.5% of the respondents as the environment where the tourists had difficulties with communication and multilingual signs, followed by train stations, retail establishments and accommodations with 17.4%, 16.2% and 5.4% respectively.

The place where the tourist had problems with communication or multilingual signs (MRQ)		
Restaurants	920	28.5%
Train station	561	17.4%
Retail establishments	522	16.2%
Accommodation	173	5.4%
Castles, Shinto Shrines and Buddhist Temples	316	9.8%
		n=3225

Table 3: Multilingual signs (compiled by the author from MLIT JTA 2018)

2.1.2 Free Wi-Fi

Returning to the most selected problem in 2014, which was public free Wi-Fi access, its severity seems to be declining, from 30.2% in 2014 to 18.5% in 2016, 13.2% in the last year (2017). This moved the topic of public internet from the most selected inconvenience to the 4th place on the list. Information regarding free Wi-Fi is, however, still selected as "useful information during travel" by foreigners. In the Consumption Trend Survey for Foreigners Visiting Japan both in 2016 and 2017 Free Wi-Fi information was selected most often from multiple response questions on the issue, at 51.1% and 54.2% respectively (JTA, 2017a, 2018a).

Useful information during travel (MRQ)		
	2016	2017
Accommodations facilities	25.2%	23.8%
Transport	46.8%	47.2%
Restaurants	32.7%	33.2%
Tourist facilities	22.9%	21.3%
Shopping locations	24.1%	22.9%
Free Wi-Fi	51.1%	45.2%
...	. . .	. . .
	n=39956	n=40213

Table 4: Useful information (compiled by the author from MLIT JTA 2017, 2018)

2.1.3 Method of payment

The number of electronic payments with credit and debit cards is growing in Japan, but apart from their simplicity and practical nature, there are other reasons for foreign tourists to prefer this payment method. One of the reasons is the relatively high costs and the bad exchange rate associated with withdrawing cash from an ATM. Not only does card payment allow the traveller to travel with less cash, but because of the better exchange rate, it does also make it cheaper to pay for the services and goods, even if only by a fraction of the price. The previously mentioned Survey on inbound tourism readiness (JTA, 2017b, 2018b) shows

credit and debit card acceptance as a growing problem during the trip, as in the three years of the survey this topic was selected in 2.6%, 4.3% and 5.8% of the time by the tourists. In the last year of the survey, tourist chose 8.3% of the time "paying" as a situation in the restaurants, where they experienced difficulty, but a more detailed survey is needed to determine how much electronic payment played a part in this problem.

Electronic payment is a growing industry worldwide, and it is an important change in the behaviour of tourists from Asian sending markets too. A survey by Nielsen and Alipay showed that 41% of the Chinese tourists' marked "payment method" as an important factor affecting shopping overseas. The survey also states that 82% of the respondents used their bank cards for payment during their last visit (Nielsen and Alipay, 2017). South Korea is also moving towards electronic payment, where the data of the Bank of Korea (BOK) cited by The Straits Times show that cash payment is one of the lowest in the world (Choon, 2016). With the tourists and residents of the growing sending markets (such as China and South Korea) introduction of electronic payment methods is essential for the tourism industry both for tourist satisfaction and for increasing the money spent by tourists in a given destination.

These surveys paint a picture where communication, payment and internet are some of the main problems a foreigner has in Japan. This research is concentrating on the host-guest connection in accommodations, and on the difficulties, the host side has in developing a foreign-friendly environment. These topics are included in the survey of the accommodations, through questions of communication, foreign language speaking staff, electronic payment possibilities, and so forth. The aforementioned survey of foreign tourists points out that outside of the main cities, accommodations are the second most often selected places where communication problems with facility members arose. This research concentrates on rural areas of Japan, smaller communities further away from the main cities of Osaka, Tokyo, etc.

2.2 Accommodation sector and inbound tourism

An ageing society has an immense impact on the tourism industry as a whole and in the accommodation sector. The declining and ageing population will cause a shrinking domestic demand in the long-run, but more important, it will cause a shortage of people who can be employed either as full-staff or as part-timers. This will cause several problems and will need open-mindedness to foreign workers.

The prospects of shrinking domestic demand bring inbound tourism into the picture. Accommodations need foreign tourists, as a sector that is struggling with high human resource need and low efficiency, foreign tourists can mean the necessary increase in higher earning incomes. Morikawa (2017, p. 3) comments on the reasons why inbound tourism is important for accommodations, stating that foreign guests ease the seasonality difficulty of the sector through "temporal smoothing of guest-nights" (Morikawa, 2017, p. 3). The research paper continues, stating that the increase of demand together with monthly lower volatilities of guest-nights

for foreigners are part of the reason why inbound is necessary for accommodations. Morikawa summarises the calculations as "the increase in the number of foreign visitors significantly improves the measured physical total factor productivity" (Morikawa, 2017, p. 10).

A similar positive conclusion can be found in Yagasaki's article from 2019, where Kyoto's tourism statistics show an increase of foreign tourists in the off-season month (Yagasaki, 2019).

The changes in the tourism demand and management attitude are described in Kumada's article, where the shift from tourist groups to FITs (Free Individual Tourist) is introduced (Kumada, 2018). This change makes it more difficult for accommodations to manage foreign groups, as in the previous system (group tours) most of the time there was an accompanying guide and interpreter, who helped both the tourists and the accommodation's staff in their direct and indirect communication. Kumada argues that in the future of tourism, investment into human resources is going to be an essential point of the strategy of accommodation facilities.

The service provided in accommodations has to be developed to welcome foreign guests and to have them a high-satisfaction experience. Morishita (2019) describes the positive impact of foreign tourists' reservation on accommodation management, as they tend to reserve earlier and stay longer than domestic guests. Morishita also mentioned the higher ratio of off-season bookings of foreigners that is crucial for the accommodations. Although the inbound tourists are beneficial for the baseline of the establishment, these type of guest needs extra care, or in other words, extra investment of resources. As Morishita lists the difficulties an accommodation has to overcome, there is the language barrier, coupled with a different cultural background that makes it crucial, and in the meantime difficult, to explain for example proper eating methods and manners. While development modern translation and interpretation technologies offer a glimpse of hope for the management of such accommodations, a machine-translated explanation will not be on the level of the famous Japanese omotenashi (hospitality). (Morishita, 2019) Multilingual environment and language speaking staff are needed to provide the level of comfort that the foreigners are looking forward to.

The human-labour heavy accommodations industry is facing difficulties in terms of securing employees, as Yagasaki explains in a research paper. According to the calculations, even with change of visa permits and growing number of foreign employees in the accommodation sector, the workforce deficit in the sector will reach roughly 100'000 by 2023(Yagasaki, 2019). Some developed countries have a high ratio of foreign workers, with London being the often referred example of 60% to 80% immigrant workers in accommodation establishments. Japan, for the time being, does not have such high ratio of foreign employees, but in the larger cities with universities nearby, the trend to employ students is already visible (Yoshida, 2019).

3. Research method

Tourism-related attitude studies are conducted in the time of change, often in rapid

industry growth and the *Not In My Back Yard* (NIMBY) attitude towards the city, infrastructure and environment developments are measured. Some policy changing processes do involve the short interview survey of the stakeholders, as was in the case of hotel development moratorium in Charleston in South Carolina (Litvin et al, 2020), but the majority of the attitude studies are concentrated on the resident's attitude towards tourism. These studies are one of the most researched topics of tourism studies with a detailed breakdown of the different theoretical frameworks in Litvin et al (2020) Although the survey in Charleston did include both residents and hotel manager's opinion, attitude surveys concentrating on accommodation, especially in rural Japan, are still scarce.

This paper aims to address this lack of information on the current state of the tourists' environment in rural accommodations and the attitude towards foreigners and the development and improvement of services towards the inbound market.

The research papers introduced in the literature review show the growing importance of inbound tourism for the accommodation industry, with seasonality smoothing effects and longer periods of staying at one establishment. The research papers and survey also indicated the importance of communication, as the core of the omotenashi hospitality, and the most often had difficulty during a trip to Japan. This paper aims to gather information on these elements of an accommodation's service, as well as the attitude towards foreigners. The workforce shortage is another difficulty, and while researchers such as Yoshida are concentrating on larger cities, rural accommodations' situation is less discussed (Yoshida, 2019).

The survey was carried out in 6 stages, with approximately one month for every destination. In order, Tsuwano (Jan. 2018), Onomichi (Aug. 2018), Ojika (Nov. 2018), Shimonoseki (May 2019), Kurashiki (May 2019), Hagi (Jun. 2019), Takayama (Jun.-Jul. 2019), identifying the destination based on the sender's name or phone number. Except for Takayama, the author personally travelled to the destinations, and visited the accommodations aiming for a higher valid survey sheet return, and to have short unstructured conversations with the owners and managers of the establishments. In Takayama, the number of accommodations made personally visiting them difficult, thus an introduction letter and question from was sent through the post.

The survey questions are compressed into a single A4 answer sheet, accompanied by a short description of the researcher and the survey topic. The accommodations were asked to send the filled out answer sheet through fax to the researcher's fax number. The list of accommodations was compiled from data of the local tourism associations as well as several online accommodation reservation sites.

3.1 3.1 Questionnaire

The questionnaire can be divided into several parts, starting with the base information of the establishment, such as type, year of establishment, size of the operations (room capacity and the number of full-time/part-time employees), the ratio of foreign guests and average price

level of the accommodations.

The second part is a group of questions concentrated on tourism industry from the point of view of the accommodations, listing several topics which may cause difficulties, and a severity 4-grade scale from "not a problem" to "considered as a big problem".

A similar structure of questions is asked about the inbound tourism and the concerns of the accommodations connected to it. After both the general tourism and inbound tourism question group, the establishments can pick 3 different topics that they "wish to receive support" from the local government or tourism association.

After a few questions on the environment a foreign tourist finds in accommodations (multilingual service and signage, etc.). Lastly, questions on the accommodation's attitude towards foreigners are asked.

	Sent	Valid replies			Num.	
Ojika	11	3	27.3%	City hotel	5	7.1%
Tsuwano	11	7	63.6%	Business Hotel	12	17.1%
Hagi	35	9	25.7%	Resort hotel	2	2.9%
Takayama	91	25	27.5%	Onsen Ryokan	8	11.4%
Onomichi	33	7	21.2%	Ryokan	22	31.4%
Shimonoseki	27	10	37.0%	Pension	5	7.1%
Kurashiki	27	9	33.3%	Public Accommodation	15	21.4%
Sum	**235**	**70**	29.8%	Other	1	1.4%
				Sum	70	

Table 5: Survey statistics (compiled by the author)

A varying level of valid replies can be seen in Table 5, with an average of 29.8%. The explanation for the high ratio of valid replies in Tsuwano is that at the time, the author was employed by the local government of Tsuwano in a tourism-related position, thus there was an already-existing connection with the managers of the accommodations. The low number of accommodations in small destinations accompanied by a somewhat low reply ratio makes it difficult to generalise from the results of the survey. There are several different types of establishments which sent valid answers to this survey, summarised in Table 5.

Important information on these accommodations is the ratio of foreign guests. There is a connection with the overall tourism statistics, and apart from Takayama, most of the accommodations have a low ratio of foreign guests. This data cannot show the trend, which is visible in the destinations' statistics, that while the ratio is mostly still low, it is on a sharp rise.

Ratio of foreign guests	0-19%	20-39%	40-59%	60-79%	80-100%
Ojika	3				
Tsuwano	7				
Hagi	9				
Takayama	7	5	3	5	4
Onomichi	4	3			
Shimonoseki	8	1	1		
Kurashiki	3	5	1		
Sum	41	14	5	5	4
Ratio	59.4%	20.3%	7.2%	7.2%	5.8%

Table 6: Inbound ratio of Accommodations (compiled by the author)

4. Results

4.1 Destinations

This research aims to understand the difficulties and attitude of rural destinations in Japan, which have the potential to grow in inbound tourism. The destinations were selected around the main theme of a UNESCO World Heritage designation and the Japanese government's Japan Heritage destination, as these function as branding for international and domestic tourist.

Town/City	Prefecture	Designation / registration
Ojika	Nagasaki	Part of UNESCO World Heritage
Tsuwano	Shimane	Japan Heritage, and part of another Japan Heritage designations
Hagi	Yamaguchi	Part of UNESCO World Heritage
Takayama	Gifu	Japan Heritage
Onomichi	Hiroshima	Japan Heritage, and part of two other Japan Heritage designations
Shimonoseki	Yamaguchi	Part of a Japan Heritage
Kurashiki	Okayama	Japan Heritage

Table 7: Destinations selected for the survey (compiled by the author)

While the World Heritage is recognised everywhere (with a long history), the Japan Heritage designation was established only a few years ago in 2015. The Agency of Cultural Affairs aims to recognise 100 stories across the country as Japan Heritage by 2020, not just aiming at a preservation activity but also on educational and revitalisation of rural communities through inbound tourism. The keywords of the definition of Japan Heritage contain "inbound tourism" and it is safe to assume that the government is going to market the brand towards foreign tourists (Japan Heritage, 2019).

The definition of the Japan Heritage does contain the keywords of "rural/local revitalisation, but rural/local is not defined further, and in some cases, cities with a population of (such as) have been registered too. In this research, a destination with the largest population is

Kurashiki with 477,118 residents.

Basic information on these destinations are in Table 8, starting with population data, tourism statistics and inbound tourism percentage. The table was compiled by the author, based on data from local authorities (Hagi City (2015, 2018a), Kurashiki City (2015,2018), Ojika Town (2016), Onomichi City (2018a,2018b), Shimonoseki City (2018), Small but shining Ojika Town (2013), Takayama City (2015,2016,2019), Tsuwano Town (2016, 2018a, 2018b) prefecture databases (Nagasaki Prefecture (2012,2018), Shimane Prefecture (2016,2017,2019), Yamaguchi Prefecture (2016)) and tourism a associations (Hagi Tourism Association (2018)).

The destinations are arranged in ascending order of population, from the smallest Ojika Town to Kurashiki City. The shrinking and ageing population of Japan has a different impact on these destinations, with 5 of the 6 destinations shrinking in a pace of 7.3% to 21.7%, and only Kurashiki city has grown with 1.6% in the 10 years between the 2005 and 2015 census. The ratio of residents above 65 is strikingly high in the smaller communities, with 47% in Ojika, 44.6% in Tsuwano and 39.5% in Hagi. These numbers give us a glimpse into the reality of rural Japan, where almost half of the population is already retired or will be soon retiring. The impact of the ageing society on the tourism industry is visible, as the supply side of the tourism industry is shrinking due to accommodations and restaurants closing after the owners retire.

City/Town	Ojika	Tsuwano	Hagi	Takayama	Onomichi	Shimonoseki	Kurashiki
Prefecture	Nagasaki	Shimane	Yamaguchi	Gifu	Hiroshima	Yamaguchi	Okayama
Population(2005)	3,268	9,461	59,578	96,231	150,225	290,693	469,377
Population(2015)	2,560	7,956	49,560	89,182	138,636	268,517	477,118
2005 base	-21.7%	-15.9%	-16.8%	-7.3%	-7.7%	-7.6%	1.6%
Age 14 and under	7%	8.2%	9.8%	13.4%	11.5%	11.6%	13.7%
Age from 15 to 64	44%	47.2%	50.5%	55.6%	54.0%	55.1%	57.6%
Age 65 and above	47%	44.6%	39.5%	31.0%	34.0%	32.8%	26.0%
Tourism (2017)	23,726 guest nights	34,049 guest nights	445,177 overnight guests	2,213,000 overnight guests	6,800,612 visitors	809,582 overnight guests	991,702 overnight guests
From 2012 and 2017							
overall tourist numbers	+5.1%	-3.9%	-3.7%	+12.9%	+9.2%	+9.1%	-5.1%
foreign tourist numbers	+9300%	+46.4%	+520%	+240.1%	+329%	+195%	+400%
Percentage of 2012	0.01%	1.6%	0.8%	7.7%	1.1%	0.9%	1.6%
foreign tourists 2017	0.8%	2.5%	5.4%	23.2%	4.2%	2.4%	6.7%

Table 8: Population and tourism statistics (compiled by the author)

The destinations have a different level of inbound tourism, ranging from 0.8% to 23.2%, but a common trend is the growing importance of the foreign guests, both in absolute numbers and as a part of the total tourist numbers. In the case of Tsuwano, Hagi and Kurashiki, although the domestic tourist numbers are falling, more and more foreign tourists are coming to the destination, This rise of foreign tourists are seen as a chance for the industry to counterbalance the declining numbers, partly due to the ageing and decreasing population of all of Japan.

The statistical reports on tourism differ prefecture by prefecture, in some cases, the base unit is "overnight guests" (Yamaguchi Pref., Okayama Pref. and Gifu pref.), in Tsuwano (Shimane Pref.) and Ojika (Nagasaki Pref.) it is "guest-nights spent" and lastly in the case of Hiroshima

Pref. only "number of tourists" data is accessible, and it is not divided into overnight-guest and visitors. This makes a comparison of destinations in different prefectures difficult, thus in Table 8 only a comparison between 2012 and 2017 numbers, not across destinations.

4.2 Survey results

The results of the survey are summarised in the following section, separated by topic such as tourism general, concerns towards inbound tourism, environment and attitude towards inbound tourism. The results are detailed by topic and by destination, with the average of the data also displayed.

4.2.1 Tourism industry

Topics about the overall tourism are brought up, with a concentration on market change, workforce and modernisations.

	Not a problem			Big problem	Not a problem			Big problem
	Declining tourist numbers				**Changing demography and demands of tourists**			
Ojika	33%		33%	33%	33%		33%	33%
Tsuwano			14%	86%	17%	50%		33%
Hagi	11%	11%	44%	33%		44%	11%	44%
Takayama	35%	4%	39%	22%	5%	50%	32%	14%
Onomichi	14%	29%		57%	17%	50%	33%	
Shimonoseki	44%	22%	22%	11%	56%	22%	22%	
Kurashiki		22%	33%	44%	11%	44%	44%	
Total	22%	12%	30%	36%	16%	42%	27%	16%
	Seasonal fluctuation				**Changing tourism market structure (net reserve.)**			
Ojika	33%			67%	67%	33%		
Tsuwano	29%		29%	43%	29%	43%	14%	14%
Hagi		33%	33%	33%	29%	29%	29%	14%
Takayama	18%	23%	41%	18%	14%	36%	23%	27%
Onomichi	14%	14%	43%	29%	29%	29%	29%	14%
Shimonoseki	22%	22%	44%	11%	33%	33%	33%	
Kurashiki		22%	67%	11%	22%	67%	11%	
Total	15%	20%	41%	24%	25%	39%	22%	14%

Table 9: Survey results, the tourism industry (compiled by the author)

The first set of questions, shown in Table 9, concentrate on the overall tourism industry, with declining tourist numbers, seasonal fluctuations, changing tourist demography and market conditions.

The results show that declining tourist numbers and seasonal fluctuation is considered as difficulty in most of the destinations, with 30% for moderate and 36% for a serious problem and 41% and 24% for seasonality respectively.

Seasonality especially seems to have a definite but moderate impact on most of the destinations, with Ojika and Tsuwano being impacted the most.

According to the answers, changing tourism market structure (internet reservation,

sharing industry) and the changing demography and demands of tourists is something that the establishment can manage themselves in most of the cases. According to the short conversations with the managers, in smaller communities the sharing industry is not as developed as in big cities, thus the industry members don't feel the pressure of having to adapt to the new trends, and while the tourists are getting older with the rest of the population, their needs and expectations seem to remain mostly the same.

	Not a problem			Big problem	Not a problem			Big problem
	Shortage of workforce to employ fulltime					Shortage of workforce to employ part-time		
Ojika		33%	33%	33%		33%	33%	33%
Tsuwano	14%		29%	57%	14%		71%	14%
Hagi				100%		13%	13%	75%
Takayama	27%	23%	9%	41%	19%	24%	24%	33%
Onomichi	14%		43%	43%	14%	29%	14%	43%
Shimonoseki	22%	22%	33%	22%	22%	11%	44%	22%
Kurashiki	11%	44%	22%	22%	33%	44%		22%
Total	17%	18%	20%	45%	17%	22%	27%	34%
	Shortage of chefs and other skilled workforce					Ageing workforce		
Ojika		50%	50%		33%	33%		33%
Tsuwano	33%		33%	33%		17%	50%	33%
Hagi	13%	38%	13%	38%				100%
Takayama	52%	10%	14%	24%	27%	18%	23%	32%
Onomichi	43%		29%	29%	29%	14%	14%	43%
Shimonoseki	67%	22%		11%	33%	22%	22%	22%
Kurashiki	20%	20%	20%	40%	75%		13%	13%
Total	41%	16%	17%	26%	29%	14%	19%	38%

Table 10: Survey results, workforce (compiled by the author)

The second set of questions is around the theme of the workforce, which is generally considered as difficulty in Japan's tourism industry. As the results in Table 10 shows, the shortage of workforce is especially troublesome in the smaller and faster ageing communities such as Ojika, Tsuwano and Hagi, with moderate problems in middle-sized cities, and only growing Kurashiki seems to have fewer problems connected to this topic. The already employed workforce's ageing follows the same pattern.

While the search for new employees seems to be difficult, skilled labour (such as chefs) is scarce in the largest city of Kurashiki, selected as "not a problem" in 41% overall.

The future development and modernisation is the theme of the last set of questions (Table 11) from this part of the survey, starting with a difficult question of successors for the business. Surprisingly this is not considered as a problem by the respondents as the population data would suggest.

	Not a problem			Big problem	Not a problem			Big problem
	No successors				**Building modernisation**			
Ojika	67%			33%	67%			33%
Tsuwano	50%	50%				17%	33%	50%
Hagi	50%		25%	25%		22%	56%	22%
Takayama	41%	14%	18%	27%	9%	17%	43%	30%
Onomichi	50%	33%		17%	29%	14%	57%	
Shimonoseki	44%	11%	11%	33%	44%		33%	22%
Kurashiki	38%	38%	13%	13%	33%	22%	22%	22%
Total	45%	19%	13%	23%	20%	15%	39%	26%
	Amenity modernisation				**Inbound tourism**			
Ojika	67%			33%	67%			33%
Tsuwano		17%	83%		20%		80%	
Hagi	11%	33%	44%	11%	11%	33%	56%	
Takayama	32%	23%	36%	9%	47%	24%	29%	
Onomichi	29%	29%	43%		33%	17%	33%	17%
Shimonoseki	44%	22%	11%	22%	44%	44%	11%	
Kurashiki	11%	67%		22%	78%	11%	11%	
Total	26%	29%	32%	12%	43%	22%	31%	3%

Table 11: Survey results, modernisation and inbound (compiled by the author)

Looking at the data of Table 11, Ojika seems to be quite positive on the future of the local tourism industry, not considering a successor to the business and modernisation as a problem, but this is because the establishments which did send back the filled out survey, were created less than 8 years ago. In the case of Ojika, while this survey can portray the difficulties connected to the workforce and inbound tourism, this set of questions concentrating on the modernisation and future of the establishment give back results that cannot fully represent the local industry. Some of the accommodations with owners in their 80's did not have a fax machine, not to mention email, thus their opinion is not visible in this survey (no answer sheet came back from 8 of the accommodations, only from the three establishments with younger owners). Apart from Ojika, while successors are not a problem, building and amenity modernisation are difficulties for traditional destinations with older establishments (Tsuwano, Hagi, Onomichi and Takayama), similarly to inbound selected as difficulty in the same destinations, except Takayama.

Takayama was designated as an inbound tourism example by the Japanese government, and many development projects have been started that are not present in other destinations. While these projects can help with the overall attitude and approach towards inbound tourism as well as support amenity modernisation, building modernisation is still something that has to be addressed.

17	Declining tourist numbers
11	Seasonal fluctuation
10	Changing demography and demands of tourists
8	Shortage of workforce to employ fulltime
8	Building modernisation
7	Changing tourism market structure (sharing economy, etc.)
5	Ageing workforce
4	Shortage of workforce to employ part-time
3	Inbound tourism
2	Amenity modernisation
1	Lack of successors

Table 12: Survey results, support for the tourism industry (compiled by the author)

4.2.2 Inbound tourism

The questions regarding inbound tourism are grouped into 12 questions similarly to the general tourism question. The wording of the questions is intestinally written in a way that either past experience or concern of future occurrence is accepted, thus accommodations without foreign guest as well as accommodations with a high ratio of foreign guest can answer the same question.

	Not a problem			Big problem	Not a problem			Big problem
	Concern of difficulty communicating with foreigners				**Shortage of workforce speaking foreign languages**			
Ojika	50%	0%	0%	50%	50%	0%	0%	50%
Tsuwano	14%	0%	71%	14%	0%	0%	57%	43%
Hagi	0%	33%	11%	56%	0%	33%	0%	67%
Takayama	41%	14%	36%	9%	17%	35%	30%	17%
Onomichi	29%	14%	0%	57%	29%	0%	14%	57%
Shimonoseki	40%	10%	50%	0%	20%	40%	30%	10%
Kurashiki	11%	67%	22%	0%	11%	11%	67%	11%
Total	27%	21%	32%	20%	15%	24%	31%	30%
	Increased costs of workforce speaking foreign languages				**Promotion to foreigners**			
Ojika	50%	50%	0%	0%	50%	50%	0%	0%
Tsuwano	14%	14%	57%	14%	0%	29%	57%	14%
Hagi	22%	33%	22%	22%	11%	22%	44%	22%
Takayama	26%	43%	13%	17%	36%	36%	14%	14%
Onomichi	50%	33%	0%	17%	29%	43%	29%	0%
Shimonoseki	30%	40%	20%	10%	20%	10%	50%	20%
Kurashiki	56%	22%	22%	0%	22%	11%	67%	0%
Total	32%	35%	20%	14%	24%	27%	36%	12%

Table 13: Survey results, communication and workforce (compiled by the author)

Table 13 shows the results for the first set of questions concerning inbound tourism. Communicating with foreigners and having foreign language-speaking staff is a topic that accommodation owners and managers are concerned about in smaller destinations such as Ojika, Tsuwano and Hagi, but even in some larger cities such as Onomichi. Shimonoseki, Kurashiki and Takayama with a longer history of foreign trade and international visitors seem to have smaller problems with this issue.

While foreign language speaking staff is scarce, increased costs of such workforce do not seem to impact establishments, either because these employees are paid the same, or the difference is not substantial.

Promotion is an issue in most of the destination, with the exception of Takayama and Onomichi.

	Not a problem			Big problem	Not a problem			Big problem
	Concerns of troubles during Check-in/out				**Concerns of troubles during payment**			
Ojika	50%	50%			100%			
Tsuwano	14%	43%	43%		43%	57%		
Hagi	33%	33%	22%	11%	44%	44%		11%
Takayama	48%	16%	24%	12%	50%	18%	27%	5%
Onomichi	29%	14%		57%	29%	29%	29%	14%
Shimonoseki	40%	50%	10%		50%	30%	20%	
Kurashiki	56%	22%	22%		33%	67%		
Total	41%	28%	20%	12%	45%	35%	15%	5%

Table 14: Survey results, Check-in/out process (compiled by the author)

	Not a problem			Big problem	Not a problem			Big problem
	Uncertainty of regulations on ID and passport handling				**Creating multilingual signs in the establishment**			
Ojika	100%				50%	50%		
Tsuwano	43%	57%				29%	29%	43%
Hagi	44%	33%	11%	11%	22%	22%	44%	11%
Takayama	45%	36%	14%	5%	32%	45%	14%	9%
Onomichi	43%	29%	14%	14%	29%	43%		29%
Shimonoseki	50%	40%	10%		50%	10%	40%	
Kurashiki	89%	11%			44%	44%		11%
Total	53%	33%	9%	5%	32%	35%	20%	14%

Table 15: Survey results, Check-in/out process (compiled by the author)

While communication and finding foreign language speaking workforce is difficult, the establishments in most of these destinations feel comfortable about the Check-in/out, payment process as well as the regulations connected to passport and ID of foreigners, from abroad or living in Japan.

Accommodations in smaller communities seem to have difficulty with creating a multilingual environment in the accommodation. During the short conversations with the owners and managers of Tsuwano and Hagi, the explanation for this is that there are not too many English speaking Japanese or foreigners in these communities, and the few English teachers who are there, do not speak Japanese well enough to understand the needs of the establishments. On the other hand, Takayama had various initiatives in the past, aiming for English education of the industry members and sign translations. This is partly the result of the inbound tourism destination designation from the Japanese government.

	Not a problem			Big problem	Not a problem			Big problem
	Concerns how to show hospitality to foreigners				Difficulty meeting demands of allergies and religious restrictions			
Ojika	50%	50%			50%	50%		
Tsuwano	14%	29%	57%		29%	29%		43%
Hagi	33%	44%	22%		11%	33%	33%	22%
Takayama	36%	41%	23%		27%	41%	9%	23%
Onomichi	33%	50%	17%		17%	50%	17%	17%
Shimonoseki	30%	40%	20%	10%	30%	40%	30%	
Kurashiki	44%	22%	33%		11%	33%	56%	
Total	34%	38%	26%	2%	23%	38%	22%	17%
	Concerns of causing trouble to other guests				Onsen manners, Manners during dinner			
Ojika	50%	50%			50%	50%		
Tsuwano	33%	17%		50%	29%	29%		43%
Hagi	22%	33%	11%	33%	13%	50%	25%	13%
Takayama	22%	43%	26%	9%	33%	29%	25%	13%
Onomichi	57%	29%	14%		50%	33%	17%	
Shimonoseki	50%	20%	20%	10%	67%	22%	11%	
Kurashiki	22%	78%			17%	83%	0%	
Total	32%	39%	15%	14%	35%	37%	16%	11%

Table 16: Survey results, hospitality and manners (compiled by the author)

Lastly, hospitality and manners are the topics of the next group of questions. While most of the establishments are confident in their skills to convey the Japanese omotenashi (hospitality), which includes the grand dinners of a ryokan, and there seem to be little problems with foreigners' manners, Tsuwano is standing out in all of the 4 questions. Further interview might be necessary to understand the underlying reason for this pattern.

Sum	
17	Promotion to foreigners
13	Shortage of workforce speaking foreign languages
8	Creating multilingual signs in the establishment
5	Difficulty meeting demands connected to allergies and religious restrictions
5	Onsen manners, Manners during dinner
4	Concerns of troubles during Check-in/out
3	Concerns of difficulty communicating with foreigners
3	Concerns of causing trouble to other guests
2	Increased costs of workforce speaking foreign languages
2	Uncertainty of regulations connected to ID and passport handling

Table 17: Survey results, support for inbound tourism (compiled by the author)

4.2.3 Foreign friendly environment

The sign's language is a problem for foreign tourists, whom often pass by their reserved accommodation without noticing (according to the short conversations with owners/managers), and still many places do not have an easy-to-read sign for international visitors.

Foreign friendly environment			
Sign's language	**Japanese**	**Alphabet**	**Both**
	54%	7%	38%
English speaking staff	**Always present**	**Sometimes**	**None**
	36%	35%	29%
Wi-Fi	**Lobby only**	**Lobby and in rooms**	**None**
	12%	77%	12%
Electric Payment	**Available**		**Not available**
	71%		29%

Table 18: Survey results, foreign-friendly environment (compiled by the author)

It can be said that English speaking staff is present in more than 70% of the establishments either always or sometimes. The 29% of no English speaking staff describes the all of the destinations, with Tsuwano as an exception, where the opposite is true; 71% of the establishments do not have foreign-speaking staff, and there is no accommodation which offers English service all the time.

Electronic payment is mostly accepted except for Ojika and Tsuwano with a lower ratio, while in the case of Wi-Fi, only Ojika is behind the trend.

	I think so			I do not think so
Inbound tourism is an important export/income for the Japanese economy	76.5%	11.8%	5.9%	5.9%
Inbound tourism is a counter measurement against declining domestic tourism	80.6%	16.4%	1.5%	1.5%
Foreigners have a strong interest in Japan culture, and tourism is an important interaction	83.8%	14.7%	1.5%	
Interaction with foreigners is an interesting experience	79.4%	13.2%	5.9%	1.5%
Will the 2020 Olympic games have an impact on your business	No impact	Not much	Little impact	Big impact
	37%	28%	15%	19%

Table 19: Survey results, attitude towards tourism (compiled by the author)

Attitude towards inbound tourism is measured through four questions, but an overwhelming number of establishments gave positive answers. Further investigation is needed into the cultural background, to find out how accurately these answers describe the real attitude of these business owners and managers or is there a cultural accepted to answer positively to this kind of questions to avoid confrontations.

The last question is connected to the 2020 Olympic Games, and whether it will have any impact on the businesses of these destinations, but more than half of the answers were negative in this regard. Kurashiki was the only destination where positive answers reached more

than 50% (77%), but all other destinations were well below this line.

5. Summary and conclusion

The aim of this research was to collect information on the difficulties that accommodations face in rural communities, especially in connection with inbound tourism.

Declining tourism numbers are generally felt throughout the destinations in the survey, regardless of the size or location, and strong seasonality has to be addressed by tourism industry stakeholders in cooperation. The changing tourism market with shifting demography of tourists, development of sharing industry and internet reservation does not seem to be of much importance or problem for these establishments.

There are differences according to the size and population structure of the destinations, but the shortage of people of working age to employ and the ageing of currently employed workforce is present as a problem in most cases. Furthermore, shortage of foreign languages speaking workforce was selected by the accommodations as the most severe problem in the inbound section of the survey.

Modernisation of buildings and amenities are somewhat difficult, but successors seem to be something that even the accommodations in smaller communities can solve by themselves.

In connection with the inbound topics, the establishments have concerns communicating and promoting their establishments to foreigners, and the aforementioned foreign language speaking staff, but most of the topics were not deemed as difficult. Similarly, accommodations required help from authorities and tourism association concerning promotion, language speaking staff and signs.

The survey was conducted in 6 destinations from small towns to cities, which gives a vertical representation of the rural tourism industry. This is especially visible in the topics that are related to the size of the community, as workforce-related problems show a different level of severity. In future research, a horizontal approach is needed, conducting the survey is destinations of similar size, to be able to strengthen the generalisation that can be deducted from the data. Similarly, with more respondents and a larger data sample, further analyses can be done on types of accommodations, size of accommodation and so forth. The current data sample is not yet large enough to be able to make strong generalisations, but it is an important starting point, to improve and change the survey format while maintaining compatibility with the already gather data.

Japan's designated heritage destinations have the potential to attract more tourists from the already overcrowded central cities (Sano & Nan, 2020), revitalising their community and countering declining domestic tourism. Accommodation is a key point of these rural communities' tourism industry, but several problems need to be addressed. This research aimed to unearth the problems that these establishments face and to better understand their attitude and

approach towards the rising inbound tourism.

While there are several government-supported projects to develop a foreign tourist-friendly infrastructure (Kumada, 2018), the soft power, the people working in these establishments are key elements of the experience and seems to be the most severe problem.

Future government projects have to reemphasise the development of foreign language speaking young tourism workforce in heritage destinations where international tourist numbers may rise, as this resource is declining in a fast pace (Yagasaki, 2019). These newly trained multilingual staff can also help in creating a better environment in the accommodations (multilingual signs), help create promotion materials to attract more visitors.

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Appendix

Accommodation survey question sheet

訪日外国人と宿泊施設の現状

山口大学東アジア研究科博士課程のペルラキと申します。お手数をかけしますが宿泊施設のインバウンド対策と困難についてのアンケート調査にご協力をお願いたいと思います。観光産業の問題を把握するため、産業の皆様の貴重なご意見が必要と思いまして、アンケート調査を実施したいと思います。
何卒、宜しくお願い申し上げます。

一般情報

宿泊施設の種類 □ シティホテル □ ビジネスホテル □ リゾートホテル □ 簡単宿所
□ 旅館 □ 温泉旅館 □ 民宿 □ 民宿 □ その他：_____

創立の年：___ 収容人数：[ ]棟 [ ]室の和室で合計 [ ]名 [ ]室の洋室で合計 [ ]名

従業員数：□ 0-9人 □ 10～29人 □ 30～99人 □ 100人以上 のうち、パート・アルバイトの割合 [ ]%

訪日外国人客のだいたいの割合 □ 0-19% □ 20-39% □ 40-59% □ 60-79% □ 80-100%

値段（素泊まり、一人一泊）□ 0-5000 □ 5000-10000 □ 10000-20000 □ 20000-

営業上での困難（チェックを入れてください）

問題と感じてない
解決できる問題と感じている
やや問題と感じている
大きな問題と感じている

1				観光客が減る
2				観光客構成、ニーズの変化
3				季節による宿泊客数の変動・増減
4				市場の複雑さの変化(ネット予約,民泊など)
5				正社員に雇う人材の不足
6				パートやアルバイト人材の不足
7				調理師など熟練者人材の不足
8				人材の高齢化
9				後継ぎがいない
10				施設(建物)の整備、維持、近代化の困難
11				客室での備品の整備,維持,近代化の困難
12				訪日外国観光客 (テレビ、エアコン、ポット等)
13				その他：

上の1から13の中で政府や自治体、または観光協会の支援が必要と思われることがあれば、最大3つ選んでください。番号：____、____、____

宿名の看板
□ 日本語 □ ローマ字 □ 両方

英語できるスタッフ
□ いつもいる □ いない
□ いるが、いつもではない

クレジットカードが利用できる
□ 利用可能 □ 利用不可能

無線インターネット
□ ロビーのみある □ ない
□ ロビーと各室にある（電波がある）

トイレの整備
□ 和式 □ 洋式 □ 両方

訪日外国観光客：下のトピックについて問題があった、又は問題がおこるという不安がありますか。

問題と感じてない
解決できる問題と感じている
やや問題と感じている
大きな問題と感じている

1				外国人とのコミュニケーションの不安
2				外国語ができる人材の不足
3				外国語ができる人材人件費が高い
4				外国人への宣伝・PRが難しい
5				予約やチェックイン・アウトに関するトラブル
6				支払いに関するトラブル
7				外国人宿泊客の身分証明に関する
8				施設合図（案内）の多言語化の困難
9				どのようにおもてなしをしたらよいのかの不安
10				宗教やアレルギーへの対応（食べ物等）
11				他のお客さんへの迷惑行為
12				温泉やお風呂マナー、食事マナー
13				その他：_____
14				その他：_____

上の1から14の中で政府や自治体、または観光協会の支援が必要と思われることがあれば、最大3つ選んでください。
番号：____、____、____

訪日外国人観光役についてのご意見

日本の経済として重要な輸出・収入になるので、力を入れるべき
そう思う □□□□ そう思わない

国内観光客減少対策として力を入れるべき
そう思う □□□□ そう思わない

外国人が日本の文化に興味を持っているので、観光は重要な国際交流だ
そう思う □□□□ そう思わない

外国人と交流できることでよい経験になる
そう思う □□□□ そう思わない

東京2020オリンピック競技大会はあなたのビジネスに影響がある
影響ない □□□□ 大きく影響する

自治体は観光地開発の予算を下の2つの観光客層に対し、それぞれどのような割合で支出すべき？
国内観光 [ ]% インバウンド [ ]%

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記入したアンケートを次のファクス(083) 963 9070又denes@perlaky.huに送ってください。
研究のご協力を誠に有難う御座いました。ますますのご活躍を祈っております。