

Tourism Culture

Tourism Research to Navigate VUCA

機関誌

観光文化

Tourism Culture



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Prefatory Note: Unknown, Uncertainty, and Instability — Their positive aspects serve as a source of inspiration for tourism

Hitoshi Ieda

The world is filled with unknown circumstances and uncertain phenomena, including natural disasters, pandemics, accidents, crimes, currency fluctuations, wars, terrorism, and riots. Addressing these challenges is by no means a simple task.

On August 8, 2024, a magnitude 7-class earthquake struck Miyazaki Prefecture, prompting the government to issue its first-ever "Major Earthquake Warning" for the Nankai Trough. During the week of "monitoring the situation," beaches and other recreational facilities across the region were closed. However, a straightforward calculation based on the statistic of a "70% probability of occurrence within the next 30 years" suggests that the likelihood of a major earthquake occurring within a single week is merely 0.02%. This minuscule probability would only increase by a fewfold under the circumstances. No matter how catastrophic the potential event, for those of us living in a world where "a 40% chance of rain today" shapes our daily decisions, taking extraordinary protective measures specifically for "this one week" seems to serve more as a demonstration of the municipality's stance than as a measure with substantial practical significance. The term "warning" in this context should be understood as a general admonition—one that emphasizes, "Do not forget!" Addressing uncertain phenomena, particularly those of low probability or entirely unknown nature, is far from straightforward.

A concern of an entirely different dimension is the heightened "instability" of society in the age of social media. Recent examples abound: excessive criticism of a celebrity's inappropriate remarks, overreactions by companies fearful of backlash, and anti-Muslim campaigns in the UK fueled by the spread of misinformation. Underlying these phenomena are distorted senses of justice, malicious tendencies toward sadistic behavior, or the casual dissemination of rumors and misinformation, sometimes driven by intentional malice, all enabled by the "cloak of anonymity." However, what causes such behaviors to escalate abnormally is the latent desire for conformity and the pressure to conform that exist in the hearts of many. Amid rising social instability, it is all the more crucial for the tourism sector—an industry inherently characterized by its unpredictability—to place unwavering emphasis on ensuring the accuracy and reliability of information, thereby securing and maintaining trust.

However, what is arguably more important for the tourism sector is to sincerely embrace and engage with the positive aspects of the unknown and uncertainty. In his book *The Image: A Guide to Pseudo-Events in America* (1964, translated by Hoshino and Goto, Tokyo Sogensha), Daniel J. Boorstin sounded an early warning about how modern society,

transformed by the proliferation of information, has in some ways regressed from a world of reality to a world of "images" or illusions. Regarding the field of tourism, Boorstin stated, "One of the most ancient motives for travel, when men had any choice about it, was to see the unfamiliar.... The discovery of new worlds has always renewed men's minds." A quintessential example of emphasizing the unknown and uncertainty is the wandering journey, but such an undertaking is rarely feasible for the average person. Nevertheless, fields that are inherently weighted toward real experiences—such as nature-oriented travel—are inevitably accompanied by elements of the unknown and uncertainty. The spirit that can be considered the essence of tourism, viewing such elements as attractions, is encapsulated in the words of *Tsurezuregusa* (circa 1330) essay 137: "Are we to look at cherry blossoms only in full bloom, the moon only when it is cloudless?"

However, Boorstin goes on to point out, "what is brought back from there are all very different. (Nowadays) The experience has become diluted, contrived, prefabricated." This sense of crisis resonates with Tsuneichi Miyamoto's series of works on travel in Japan, and it is even more pertinent in the modern era dominated by social media and similar platforms. In this context, tourism risks devolving into a mere act of following artificially created trends, taking photos, and posting them online, with the sole focus on "as long as everyone is having fun!" This approach distances itself from the allure of the unknown and uncertainty. If this continues, tourism risks being consumed by "virtual" enjoyment, losing its role as a source of "fresh inspiration for the human spirit." It is essential to reaffirm that the unknown and uncertainty are not only the essence of tourism but also the very wellspring of its appeal.



Hitoshi Ieda

Senior Professor,
National Graduate Institute for Policy Studies
Emeritus Professor,
University of Tokyo

Born in Tokyo in 1955, he graduated from the Department of Civil Engineering, Faculty of Engineering, University of Tokyo, in 1978 and joined Japan National Railways. He was appointed as a research associate at the University of Tokyo in 1984, promoted to associate professor in 1986, and became a full professor in 1995. In 2014, he assumed the position of professor at the National Graduate Institute for Policy Studies, serving concurrently until 2016. During this time, he was also seconded to institutions such as the German Aerospace Research Institute, the University of the Philippines, Tsinghua University, and Peking University in China.

Feature Article #1: A Shrinking Society and Tourism

Yoshitaka Kumagai

Introduction

It has been 20 years since I was assigned to Akita Prefecture. In 2004, when the assignment began, the prefecture's total population was 1.02 million. According to the latest statistics, it has fallen below 900,000, and it is projected with near certainty to decline further to 650,000 by 2040. While I had understood the concept of Japan's declining population in theory, living in Akita has made it clear on a personal level. In local communities, the number of residents visibly continues to decrease, and the proportion of elderly people is steadily and undeniably increasing. Nearly all rural settlements in the mountainous areas of the prefecture are facing an existential crisis, and almost every municipality within the prefecture is shrinking—a reality that I have experienced firsthand. Incidentally, Akita Prefecture's population decline and aging rates are progressing at the fastest pace in the nation, and its birth rate remains the lowest in Japan. This trend aligns with both the various statistical indicators and the realities I have personally observed.

While there is room for debate about what constitutes an appropriate population size for Japan, considering factors such as food production capacity, habitable land area, population density, and energy supply, it is undeniable that Japan's population has grown from approximately 37 million at the start of the Meiji Restoration to over 128 million in just 140 years—a more than threefold increase. As a result, national and local government policies, as well as corporate strategies, have historically been based on the assumption of continuous population growth. However, in the years since the nation's population began to decline, it is widely recognized that various strategies have undergone significant changes. Yet, the reality is that no organization, company, municipality, or even the national government has been able to implement truly effective measures to address this issue. Particularly concerning in the context of population decline is the decrease in the working-age population, which directly leads to reduced tax revenues. Consequently, the sustainability of various public services—such as education, healthcare, social security, and the development and maintenance of social infrastructure—becomes increasingly challenging. Furthermore, the absence of young people from local communities leads to a loss of vitality, creating a pervasive sense of stagnation and a vague but undeniable anxiety about the future. In Akita Prefecture, the local retention rate of young people is remarkably low, with many routinely leaving the region to pursue education or employment opportunities elsewhere. On the other hand, Akita Prefecture boasts exceptional natural and cultural richness. It is home to one UNESCO World Natural Heritage Site and one Cultural Heritage Site, as well as one national park, three quasi-national parks, and eight

prefectural nature parks. Furthermore, it has 17 nationally designated Important Intangible Folk Cultural Properties—the highest number in Japan—and over 200 traditional folk performing arts preserved by individual communities. The region also hosts renowned events such as the Kanto Festival, one of the three major festivals in the Tohoku region, and the Omagari Fireworks Festival, one of Japan's three major fireworks festivals, which recently won third place at an international fireworks competition in Canada. Additionally, Akita is known for its abundance of hot springs, including the famous Nyuto Onsenkyo. However, the number of visitors to the Tohoku region remains low compared to other tourist destinations across Japan. In recent years, the proportion of foreign tourists visiting the Tohoku region as part of inbound tourism accounts for only 3%. Living in Akita, one cannot help but reflect on the role tourism can play in sustaining local communities under current conditions—where, despite abundant tourism resources, the population continues to decline, and municipalities and regions are shrinking. This sense of concern is likely shared, to varying degrees, by many rural areas across Japan. In this article, building on this sense of concern, I aim to explore the theme of "a shrinking society and tourism" and propose several research topics for consideration.

Observations and Key Concerns

Having lived in Akita for over 20 years, I have had numerous opportunities to experience various forms of tourism, both personally and professionally. During this time, I have noticed clear shifts in trends and approaches that differ significantly from traditional practices. Firstly, the number of group tour travelers has drastically declined, being replaced by individual or family-based travel. This trend has become even more pronounced since the COVID-19 pandemic, leaving many inns and hotels in the prefecture—traditionally catering primarily to school trips and group package tours—struggling to adapt to the shift. While these accommodations have made new efforts, such as offering day-trip packages with meals and hot spring access or developing collaborative programs with nearby tourist attractions, these measures have yet to provide a decisive solution.

Secondly, tourists from countries that have not traditionally visited Akita—such as individuals or small groups from the Middle East—have started to visit certain areas within the prefecture. These tourists appear to plan their trips independently, likely gathering information through various social media platforms rather than relying on travel agencies. While they engage in sightseeing activities based on information shared on social media or other online sources, language barriers seem to limit their exploration to what is readily available on the internet, resulting in experiences that remain within a predefined scope. Since these inbound tourists are not utilizing existing travel agency programs, their future

trends warrant close attention.

Thirdly, there has been a growing trend in recent years of individuals and local small-scale NPOs renting or purchasing traditional houses or vacant properties to repurpose them as accommodations. Akita Prefecture has long been home to many thatched-roof houses and sturdy traditional homes. However, due to the challenges of maintenance and the passing of residents, the number of vacant properties has continued to rise. There is a noticeable trend of renting or purchasing these properties and converting them into exclusive, long-term stay accommodations, with demand for such facilities steadily increasing. Moreover, these accommodations are often operated not by traditional travel industry professionals but by relatively young, independent entrepreneurs. These accommodation operators actively utilize social media to disseminate information and are quietly but steadily attracting guests. Given the current situation in which the rapid increase in vacant houses, particularly in rural areas across the country, has become a significant social issue, it will be important to closely monitor how this trend develops in the future.

Incidentally, Akita City ranked first in four categories in the 2022 edition of the *Best Rural Towns to Live In* rankings published by Takarajimasha and secured first place in six categories in the 2023 edition. Notably, the city has been attracting over 300 migrants annually from urban areas. Many of these migrants cite concerns about raising children in urban areas (such as securing daycare), the high cost of housing, and the stress of long daily commutes as their reasons for relocating. Additionally, the spread of telework during the COVID-19 pandemic has likely accelerated the flow of people from urban centers to rural regions. In the post-COVID era, telework is becoming a new normal. In some industries, it is not uncommon for employees to work remotely four days a week and attend the office in person only one day. This trend is expected to accelerate to some extent in the future, and its impact on the population dynamics of rural areas will need to be closely monitored.

Research Themes

Thus far, I have discussed population decline and aging in Akita Prefecture, the accompanying challenges to regional sustainability (or the risk of regional disappearance), and recent developments such as new forms of tourism, the characteristics of inbound tourism, the utilization of vacant houses, and the migration of younger generations to Akita City. Based on these observations, I would like to propose tourism research themes from a regional perspective.

First, in the context of a declining national population and shrinking regions, who should be the target audience for tourism promotion in the future? According to projections by the

National Institute of Population and Social Security Research, Japan's population, which began to decline after peaking in 2008, is expected to fall below 90 million by 2050. The nationwide aging rate is approaching 30%, with this trend already more pronounced in rural areas. For example, in Akita Prefecture, some municipalities are nearing an aging rate of 60%. This means that the population continues to decline, while the number of retirees living on pensions increases, leading to a continually shrinking overall base. Given this, the key questions to address are whether the primary demographic for tourism will continue to be the working-age population cohort residing in urban areas, or what forms of tourism might be most suitable for retirees living on pensions. Furthermore, if the number of travelers who independently gather information and plan their own trips continues to grow, what actions should the travel industry take to cater to these individuals?

With the added boost of a weak yen, the total number of inbound tourists in 2024 has far exceeded pre-COVID levels. While the "shopping sprees" of the past seem to have subsided, the consumption appetite of inbound tourists remains robust, and their interests and tourism experiences appear to have diversified significantly, driven largely by information shared on social media. Notably, their interest spans from iconic Japanese cuisine and local comfort foods to convenience store sweets and neighborhood diners—areas often overlooked by Japanese people themselves. This variety, in turn, can provide valuable insights and fresh perspectives. As previously mentioned, Akita has seen an increase in foreign tourists, including those from the Middle East. Will this trend in rural areas continue to grow regardless of currency fluctuations? Alternatively, what measures are necessary to accelerate this trend? When considering this issue in the context of Akita, the critical shortfall lies in the local capacity to accommodate visitors. This deficiency includes not only multilingual support at accommodations but also guides who can introduce areas not easily accessible through social media. Most importantly, there is a need for mechanisms that connect Akita to the world without relying on major travel agencies—systems that generate local revenue and employment—and the personnel to drive such initiatives. However, when it comes to developing human resources for inbound tourism, it seems that not only Akita but also the entire country is lagging behind. Given that domestic tourism demand is inevitably shrinking due to population decline, the regional and national strategies for inbound tourism often appear to be reactive and lacking in long-term vision. In essence, while the increase in inbound visitors driven by the weak yen is generally welcomed, the reality is that many issues on the ground are being addressed merely through ad hoc, stopgap measures. There is much commotion about the negative impacts of overtourism on local communities, yet living in Akita, I strongly feel that the benefits of inbound tourism rarely trickle down to the region. This sentiment is likely shared by many other areas across Japan.

Incidentally, many foreign tourists visiting Akita are repeat visitors to Japan. Their travel

patterns are characterized by settling in one location and using it as a base for exploring the surrounding areas. From this perspective, the demand for exclusive, long-term accommodations, such as those utilizing traditional houses or vacant properties, appears to be quietly but steadily increasing. What measures are necessary to accelerate this trend while ensuring that money circulates back into the local community? Additionally, how can these types of accommodations coexist with traditional hotels and inns, establishing a clear division of roles while fostering mutual collaboration?

A major challenge faced by migrants to Akita City is finding suitable employment. While Akita City and Akita Prefecture have established one-stop consultation centers in Tokyo to support migrants with housing, food, and other needs, it remains extremely difficult to secure an income comparable to what they earned in urban areas. However, among the migrants, there are a significant number of individuals who leverage the skills, expertise, and networks they acquired in their previous jobs to start their own businesses. While still in its early stages, the role of migrants in creating new regional businesses—such as those utilizing traditional houses or vacant properties—shows promise. This trend is likely to be observed, to some extent, in rural areas across the country. In the future, as telework becomes more prevalent in the post-COVID era and the geographical mobility of the workforce increases, it will be important to closely observe who will play what roles in promoting regional tourism and how they will contribute.

Conclusion

From the perspective of Akita, a region experiencing the most advanced population decline and aging in Japan, I have outlined several research themes, focusing on the role tourism can play in regional sustainability and revitalization. Japan's population continues to decline steadily, and aging progresses with each passing day. Under such circumstances, the focus should shift from sustainable tourism to the role tourism can play in fostering sustainable regional development. First and foremost, it is essential to consider the development of people who will lead tourism with a vision for the region's future, as well as the mechanisms for ensuring the return of benefits and the creation of employment through tourism. As someone living in a shrinking region, I look forward to engaging in dialogue with individuals who are exploring the research themes I have outlined.



Yoshitaka Kumagai

Vice President, Professor

Akita International University

Regional Vice Chair, East Asia

World Commission on Protected Areas

International Union for Conservation of Nature and Natural
Resources

Born in Sapporo, Hokkaido in 1960, he obtained a Ph.D. in Forestry from Oregon State University and subsequently worked as a researcher at Washington State University.

Feature Article #2: Examining the Public Interest in Tourism Development — Addressing regional challenges through tourism

Noriaki Nishiyama

Was There Ever an Era of Certainty?

If we are to consider tourism in an "era of uncertainty," we must first reflect on whether there ever was an "era of certainty" in tourism. If such an era existed, we must examine when it occurred and what it entailed. On the other hand, it is self-evident that there was never truly an "era of certainty." If one were to identify such a period, it might be the era of rapid economic growth in the 20th century, when society believed with confidence that economic efforts would inevitably lead to growth, allowing people to work without hesitation or doubt.

During such a period, tourism grew as a means of recreation, relaxation, and incentives, provided in packaged forms by companies or organizations, to promote the well-being of citizens and enhance the overall productivity of society. Within Japan's manufacturing-centered economy, the tourism industry was regarded as a sector responsible for managing workers' leisure time. To put it bluntly, such a tourism industry was merely a sector that provided "recreation" within society and was not considered a serious subject of engagement for politics or academia. It was largely left to the principles of the private market economy.

In the author's recollection, until the 1990s, papers using "tourism" as a keyword were virtually nonexistent in mainstream academic societies such as architecture or urban planning, to which the author belongs, aside from a few industry- and business-oriented tourism-related societies. Similarly, in national policy, there was no definitive tourism policy, with the exception of the Resort Law, a product of the economic bubble era. This absence serves as evidence that tourism was not recognized as an issue requiring attention from politicians or academics.

It goes without saying that in Europe and the United States, tourism had been treated as an important national policy since wartime and immediately after. In North America, tourism became a subject of academic inquiry as early as the 1960s, exemplified by anthropological and ethnological research groups like those behind *Hosts and Guests*.

A Paradigm Shift in the Perception of Tourism

Japan, which had lagged behind in both governmental and academic engagement with tourism, experienced a significant turning point in 2003. For the first time, then-Prime

Minister Junichiro Koizumi included the term "tourism" in his policy speech, declaring Japan a "tourism-oriented nation." This declaration marked a dramatic shift in the tide.

After the collapse of the economic bubble and the so-called "lost decade," Japan finally recognized tourism as a critical industry for a country with a declining manufacturing sector and no abundant natural resources to rely on. It is fair to say that this recognition marked a complete shift in Japanese society's attitude toward tourism. The term "tourism" began to prominently appear in academic papers across various disciplines. Keywords such as "tourism-oriented town planning," "destination-based tourism," and "DMO (Destination Management Organization)" started to be addressed not only within tourism-specific academic societies but also in a wide range of other fields.

Returning to the topic, while there has never truly been an "era of certainty," the elements of uncertainty include not only unavoidable natural factors such as global warming and infectious diseases but also human-driven factors. These include the diversification of values, the rise of individual travel, the widespread use of social media, and the expansion of risk mitigation concepts driven by advances in disaster prediction technology. From the perspective of those who aim to maintain 20th-century-style tourism, characterized by group travel and package tours, the increasing "uncertainty" described earlier is likely a source of significant concern.

Examining the Public Interest in Tourism

In conclusion, I believe that what tourism researchers should focus on in this era is the discussion surrounding the public interest of tourism. As mentioned earlier, it was only in the 21st century that Japan finally recognized tourism as an industry critical to the nation's future. However, the focus still seems to be predominantly on how to develop the tourism industry and enable businesses and regions to generate revenue. Of course, this is an important aspect, but the discussion has largely overlooked the public interest inherent in tourism—the power of tourism to contribute to the greater good.

No one questions the allocation of tax funds to education or welfare, but the public purpose of investing in tourism has yet to be clearly articulated. Tourism not only contributes to the public good indirectly through increased tax revenue driven by economic growth, but it also has the potential to directly address regional and national challenges through tourism itself. In the 21st century, tourism has clearly begun to experience a new wave of change. Are tourism researchers fully recognizing this opportunity and responding to it effectively?

Society, though uncertain about its exact nature, clearly harbors significant expectations for tourism. Meanwhile, tourism operators and the administrative bodies overseeing

tourism seem either unable to fully grasp its potential or unsure of how best to harness it. The first task for researchers should be to demonstrate what tourism can achieve for society. To elevate tourism's position in societal recognition, research that identifies areas for improvement in the attitudes and actions of those involved in the tourism industry will also be essential. More importantly, there is a need for research that earns the trust of those who have not previously engaged with tourism, convincing them that tourism is not merely an activity that provides recreation, but a critical engine for promoting the multifaceted development of regions. Such research should aim to shift society's perception of tourism accordingly.

Tourism has the power to create new employment opportunities, provide active roles for senior citizens and individuals with leisure time, and foster regional pride. Furthermore, it can promote settlement, migration, and the attraction of various businesses and investments through the enhancement of regional identity and the development of regional branding. From a broader perspective, international human exchange, supported by the activities of individual regions, can serve as a foundation for inter-state security. This is a point that needs to be emphasized.

Rethinking Destination Management

Numerous regional DMOs, collaborative DMOs, and wide-area DMOs have been established nationwide under the DMO policy. However, many of these organizations have effectively become entities focused on marketing and promoting existing tourism products or merely event planners. The societal perception of these DMOs remains unchanged from that of traditional tourism associations—as organizations of tourism operators. They are often seen, perhaps even by local governments, merely as entities focused on protecting the interests of tourism businesses.

Over the past 20 years, the author has participated in international tourism development cooperation projects through JICA, providing technical support to regions in various developing countries that are either beginning to engage in tourism or have already achieved a certain level of tourism development. What became clear from this experience is that, regardless of the development stage of a region, it is essential to establish a robust destination management organization. Moreover, such an organization must operate with a clearly defined public mission that is recognized and valued by society.

Since developing countries are fundamentally in a position to receive support, it is crucial for the donor side to be convinced of how the assistance for tourism development contributes to the public good of the region or country in question. This understanding forms the essential rationale for providing support. However, this is not an issue unique to

developing countries. Even in advanced nations like Japan, if a newly established DMO sets forth a clear public purpose and mission, it can justifiably receive tax funding to carry out tourism development with confidence and transparency.

The concept of public interest naturally varies depending on the scope and context of the region in question. However, it is not merely about increasing private sector profits and tax revenues through tourism activities. From a research perspective, one could hypothesize that by engaging in tourism promotion, a region could address various issues traditionally regarded as public responsibilities. These include the preservation of cultural heritage and natural environments, the development of human resources for these efforts, the promotion of local industries, the encouragement of settlement and migration, landscape conservation, and the creation of opportunities for civic engagement—all within the framework of Destination Management (DM). Research is needed to explore how such public interest can be defined and established in individual regions.

Due to space constraints, the details will be omitted, but examples familiar to the author include organizations such as the Shirakawa-go World Heritage Site Gassho Style Preservation Trust (Shirakawa Village, Gifu Prefecture), the Ouchi-juku Preservation and Maintenance Foundation (Shimogo Town, Fukushima Prefecture), the NPO Hagi Machiju Museum (Hagi City, Yamaguchi Prefecture), the Biei Town Revitalization Association (Biei Town, Hokkaido), and the Salt Eco-Museum (Jordan), all of which have explicitly defined public missions and are actively engaged in destination management (DM).

Risk Hedging and Tourism Strategy Research

Appropriate responses from researchers are also expected in relation to how tourism is reported by the media.

The author understands overtourism as a term that highlights the negligence of municipalities, governments, or private businesses in demand forecasting, instead focusing excessively on promotion and attraction efforts. In Shirakawa-go, the number of annual visitors surged from around 600,000 to over 1 million shortly after it was designated a World Heritage Site, causing severe traffic congestion that disrupted residents' daily transportation and even affected the movement of emergency vehicles. This situation reflects the responsibility of the government for registering Shirakawa-go as a World Heritage Site without considering the regional characteristics of this mountainous area or anticipating the resulting tourism explosion. It also highlights the responsibility of the Shirakawa Village municipality for failing to foresee these impacts locally, as well as the media's role in heavily promoting Shirakawa-go.

In Biei Town, Hokkaido, there was an incident where the "Philosophy Tree," a popular

tourist attraction, was cut down by the owner of the farmland it stood on. This outcome stemmed from local authorities and tourism operators promoting the tree in brochures and tourist maps as part of their tourism initiatives, without sufficiently consulting the farmers involved. Farmers received no benefits from tourism but were left only with inconveniences. Such cases can be considered examples of overtourism that go beyond mere quantitative issues. Similarly, the issue of Kyoto residents being unable to board buses due to overcrowding is a clear example of overtourism.

On the other hand, cases such as the sudden influx of inbound tourists to a location after a view of Mount Fuji over a convenience store went viral on social media, or the pilgrimage to the railway crossing in Kamakura featured in the manga *Slam Dunk*, are not overtourism in the fundamental sense. The tendency of the media to criticize irrelevant phenomena under the banner of overtourism or to portray tourism itself as a culprit reflects a fundamental misunderstanding of tourism and is a manifestation of society's skewed perception of its role. It is also the responsibility of researchers to correct the tendency to import the term "overtourism," which originally led to groundbreaking measures such as crowd control policies in Barcelona, and apply it superficially to blame various issues indiscriminately. The role of tourism researchers in this context is to uncover the causes behind phenomena labeled as overtourism and to present accurate insights based on a thorough understanding of the actual impacts on those affected.

From a broader perspective, the role of tourism researchers includes predicting potential tourism phenomena, such as excessive inbound tourism flows in the near future, developing methods to enable promoters to anticipate such occurrences, and devising scientific approaches to help administrative bodies monitor these phenomena and implement measures to prevent overtourism before it occurs. In this regard, research on carrying capacity must also be further advanced.

Such assessments are challenging to initiate from private enterprises, nor can they be left entirely to government authorities. On the other hand, the dissemination of these tourism strategy methodologies could be something that researchers bring to society through on-the-ground experience and thorough analysis.

Rather, it can be argued that what is truly needed is strategic research on tourism policies themselves—ones that go beyond risk-hedging studies and can assert the public interest of tourism.



Noriaki Nishiyama
Professor
Hokkaido University
Center of Advanced Tourism Studies

Born in Fukuoka City in 1961. Holds a Ph.D. in Engineering from Kyoto University. After serving as a professor at Kyushu Institute of Design and Kyushu University, he assumed his current position in 2010. His areas of expertise include architecture, urban planning, tourism design, and cultural heritage management. He is actively engaged in field research on tourism and heritage management in cultural heritage regions and in international cooperation projects for tourism development in World Heritage areas such as Jordan, Fiji, and Peru. He also serves as a member of the Traditional Buildings Preservation Council in Shimogo Town and as the Chair of the Landscape Council in Shirakawa Village.

Feature Article #3: Research on Tourism-Oriented Town Planning Based on Local Action

Naoto Nakajima

The Trend of Tactical Urbanism

In the fields of urban planning and town development, which are my areas of expertise, the concept of tactical urbanism has become well established over the past decade. It is a method of transforming cities through small-scale actions that lead to significant changes. Traditionally, the approach to transforming cities involved first discussing the ideal vision for the city, then clearly establishing that vision in the form of long-term plans, and finally implementing a series of projects to realize it. However, there have often been cases where, despite the creation of visions and plans, the path to implementation remained unclear, resulting in little to no tangible progress. Additionally, in many instances, the surrounding urban environment changed significantly during the lengthy process of pursuing a vision or plan, causing the original vision to drift away from what was initially considered ideal. The term "tactical" in tactical urbanism refers to "tactics," which are contrasted with "strategy." While strategy involves making decisions with a broad perspective and a focus on long-term goals, tactics are about adapting to on-the-ground conditions and making situational decisions in the moment. Tactical urbanism was proposed as a method of urban transformation that prioritizes concrete, tactical actions ahead of traditional vision- and plan-based strategic urban development. By focusing on immediate actions, it aims to uncover a vision for the city through the outcomes of these initiatives. It is a method well-suited to an era of uncertainty, enabling various stakeholders involved in urban development to actively participate in the process. It has become established alongside concepts such as "placemaking," where public spaces like plazas and streets are quickly, easily, and affordably transformed not only by experts but also by residents and citizens, and "social experiments," where temporary and provisional changes are made to the environment to evaluate their outcomes and challenges.

In this trend of urban development, the role of researchers and university laboratories in local communities has also evolved. Investigating local challenges and resources and collaboratively developing plans with community members to address or leverage them remains the fundamental approach for researchers and university laboratories engaging with local communities. However, the role has expanded beyond research and planning to include taking concrete actions within communities, such as organizing and implementing placemaking initiatives and social experiments. In other words, researchers and students are increasingly taking on roles as active players in urban development. They are expected by communities to think and act together, and researchers and university laboratories

themselves are seeking practical knowledge that can only be gained through concrete actions.

City of Fujiyoshida

Research on Tourism-Oriented Town Planning Around Shimoyoshida Station

Since 2010, I have been conducting research on town planning as part of a collaborative agreement between Keio University and Fujiyoshida City. Currently, as a Project Professor at Keio University, I am conducting research focused on the area around Shimoyoshida Station. This project, which began in fiscal year 2021, is carried out in collaboration with students from my Urban Design Laboratory at the University of Tokyo, and architect Mr. Hiroo Tanaka, as well as Dr. Takahiro Miyashita, an Assistant Professor at Musashino University, along with his students (Table 1). The theme of the research is tourism-oriented town planning. Shimoyoshida Station is the closest station to Arakurayama Sengen Park. At the top of a 398-step staircase within the park stands the Chureito Pagoda. The view of Mount Fuji framed by the Chureito Pagoda became widely recognized as a quintessential "JAPAN" landscape around 2016, sparked by social media posts from Thai users. Since then, it has attracted a significant number of inbound tourists (Figure 1). Originally attracting domestic tourists primarily during the cherry blossom season in spring and the autumn foliage season, the site has now become a major tourist destination, welcoming 500,000 visitors annually, including inbound tourists. However, most visitors seem content with simply taking photos or are too tired from climbing up and down the stairs, showing little interest in exploring other locations or venturing into the town. As a result, tourism and town development have not been effectively connected.

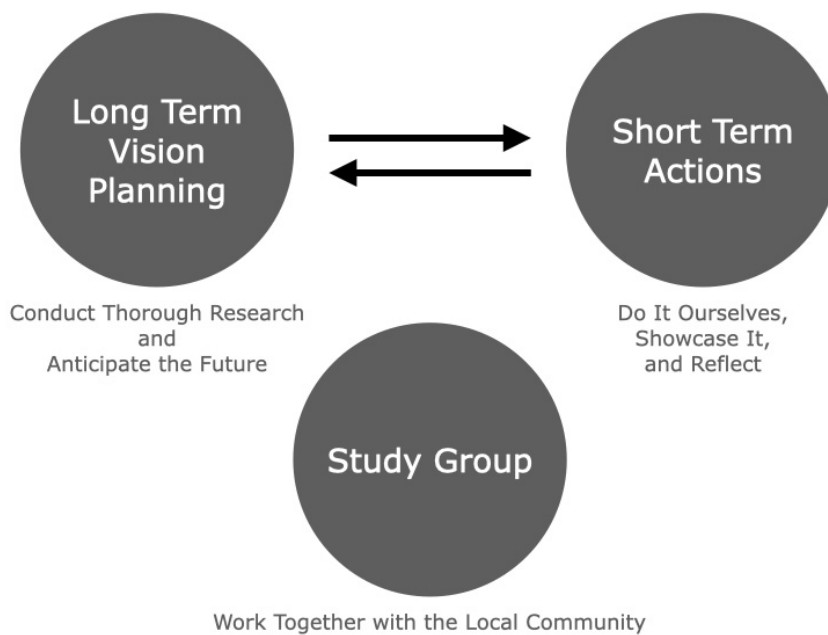


(Figure 1)
The View of Mount Fuji from
Arakurayama Sengen Park
and Chureito Pagoda

(Table 1) Initiatives for Research on the Area Surrounding Shimoyoshida Station

Fiscal Year	Short Term Action (Urban Development Experiment)	Long Term Vision	Other Initiatives	Trends in Tourist Behavior
2021	-----	Connecting the Two Sengen Shrines	21 Topics for Understanding the Region	COVID19-Pandemic, Absence and Decline of Tourists
2022	"Unraveling and Weaving Paths: A Four-Day Journey Connecting Arakura and Shimoyoshida"	Connecting the Two Sengen Shrines	Parking Lot Master Plan and Design	Recovery Trend Among Domestic Tourists
2023	"Unraveling, Riding the Town: Exploring the Future of Spaces and Mobility Starting from Shimoyoshida Station"	Creating a Unified Mobility Network Expanding from Two Shrines	Activity Exhibition Unraveling and Weaving Paths	Recovery Trend Among Inbound Tourists
2024	Reorganization of Station Plaza Space, Utilization of Station Vicinity During Off-Peak Times and Extension of Stay Duration	A Co-Creation Hub for Living and Tourism A Town Where Living and Tourism Enhance Each Other	Shimoyoshida Station Town Study Group Textile Factory Architecture Survey	Rapid Surge in Inbound Tourists

(Figure 2) Framework of the Research Study



This year marks the fourth year since we began our research study aimed at exploring what needs to be done to connect the impact of tourists visiting Chureito Pagoda to broader town development efforts. The framework for this research, which has continued from our previous studies in other areas of Fujiyoshida City, involves implementing small-scale actions while simultaneously formulating larger visions, creating a mutually reinforcing

issues. However, even as we were formulating these plans, the number of inbound tourists started to recover, driven by a weak yen, and quickly returned to pre-pandemic levels. Unlike domestic tourists, inbound tourists primarily arrive by public transportation, such as trains, or on tour buses. Many disembark in front of Shimoyoshida Station, leading to significant congestion in the station area. This created a scene unlike anything we had witnessed before. The second social experiment coincided with the city's ongoing self-driving bus pilot program. It offered three mobility options—walking, rental bicycles, and even horses—to visitors arriving at the station. Additionally, to encourage them to step beyond the park, we created a gathering space by repurposing an unused factory (Figure 4).



(Figure 5) Shimoyoshida Station-Town Study Group (5th Session, Held on September 10, 2024)

(Figure 4) Urban Development Experiment
The Scene in Front of Shimoyoshida Station in
“Unraveling, Riding the Town: Exploring the
Future of Spaces and Mobility Starting from
Shimoyoshida Station” (November 2023)



Even in fiscal year 2024, the increase in inbound tourists shows no signs of slowing down. More people than ever before, surpassing pre-pandemic levels, are disembarking at Shimoyoshida Station and visiting Chureito Pagoda. Additionally, on the opposite side of the railway tracks from Arakurayama Sengen Park, where Chureito Pagoda is located, a particular intersection in a shopping street less than a 10-minute walk from the station has gained recognition as a Mount Fuji view spot through social media. As a result, a significant number of tourists are now venturing into the town to visit this spot. The behavior of tourists attempting to take photos from the middle of the roadway became a traffic safety concern, prompting the city to deploy security personnel. While the social experiments aimed at creating spaces and providing mobility options failed to significantly alter the flow

of people, the emergence of an Instagram-worthy spot achieved this outcome remarkably well. However, the opportunities for tourists seeking the view spot to explore the town and visit local shops remain limited. In response to this situation, our research lab has been conducting a series of study sessions with various stakeholders, focusing on improving and enhancing the station-town spaces centered around the station plaza. This plaza is characterized by a mix of activity patterns, including its daily use by local residents, the arrival of tourists by train, crowds of visitors overflowing from the station waiting room as they prepare to leave, and tourists waiting for tour buses, which arrive quite frequently. Additionally, the limited availability of comfortable spaces for tourists to spend time while waiting for trains or buses presents a key challenge (Figure 5). We are currently working on both envisioning a future vision for the area surrounding the station-town space, where tourism and daily life intersect, and preparing for a social experiment in November. This experiment will focus on reorganizing the station's transportation and waiting areas, as well as creating mechanisms to encourage exploration and circulation within the area.

Toward Small, Flexible, and Decentralized Initiatives

The actions undertaken over the past four years are as outlined above. However, one of the key insights gained through our research is the highly fluid nature of tourist behavior, which serves as a fundamental premise for creating visions and plans for tourism-oriented town development. While the unique circumstances of the COVID-19 pandemic played a role, it was not the sole factor. The number of tourists fluctuates due to various socio-economic factors, including the progression of the weak yen and initiatives in surrounding tourist destinations. It is essential to explore and implement tourism-oriented town development strategies that adapt to these changes while continuously reassessing their approach. Urban planning and town development, which traditionally focused primarily on the resident population, have in recent years begun to incorporate considerations for tourists and "related populations" in the context of population decline. What becomes increasingly evident is that, while the resident population shows relatively stable trends when considering both natural and social increases or decreases, allowing for long-term projections to some extent, tourist behavior is far more volatile. The potential for boom and bust fluctuations is significant, the pace of change is rapid, and long-term predictions are much more challenging. If the foundation of planning is to align the environmental capacity of a city or town with the number of residents and visitors, then in the context of tourism-oriented town development, the very act of "planning" becomes an inherently challenging endeavor. Therefore, in tourism-oriented town development, it is crucial to refine more tactical approaches and develop processes that gradually derive long-term visions and

plans from these efforts. Researchers and university laboratories aim to contribute to local communities through the practical development and implementation of such methods and processes.

Even before the COVID-19 pandemic, Fujiyoshida City had already seen initiatives to revitalize the town by renovating vacant buildings in the city center. Projects included efforts to rehabilitate entire abandoned alleyways in certain parts of the nightlife district, breathing new life into these neglected areas. This type of town development through renovation is now common across many regional cities. Unlike traditional large-scale, hub-based investments, it involves small, incremental, and decentralized investments. As the COVID-19 pandemic subsides and inbound tourism increases, the momentum for revitalizing vacant properties is also accelerating. In Fujiyoshida City, a fund for renovating and revitalizing vacant storefronts, called the Fujiyoshida City Town Development Fund, has been established using contributions from the hometown tax system (*furusato nozei*). Subsidy programs have already been initiated through this fund. In the context of tactical urbanism, tourism-oriented town development encompasses not only social experiments targeting public spaces and public transportation but also these individual private-sector initiatives. While for each person, these investments often require significant decisions, such as securing loans from banks, they collectively represent small, flexible, and decentralized investments that allow the town as a whole to adapt to change with resilience. This approach stands in stark contrast to the large-scale tourism developments of the past, which, unable to adapt to changing times, often left numerous abandoned structures in their wake. The gradual, incremental approaches and trends that have been developed in town planning are particularly well-suited for application in tourism-oriented town development amidst an uncertain future. Researchers and university laboratories are also called upon to move beyond phenomenological observations and provide support in structuring these approaches into coherent frameworks for planning and policy development.

It is true that tourist behavior is fluid and influenced by various conditions. However, tourists are by no means a homogeneous group. Among them, there is always a segment that shows a genuine interest in the region's history, culture, and way of life—individuals who visit repeatedly with the intention of gaining deeper knowledge and engaging with the local community. While adapting to change is important, it is equally fundamental to emphasize reaching and nurturing relationships with those segments of tourists who visit repeatedly or remain loyal fans of the area. This, above all, should be the foundation of tourism-oriented town development, a point worth noting.



Naoto Nakajima

Professor

The University of Tokyo

Graduate School of Engineering

Specializing in urban planning, the author's major works include *The Ideals and Places of Urban Planning: Notes on the History of Modern and Contemporary Urban Planning in Japan*

(University of Tokyo Press, 2018), *The Urbanism of Compact Cities: Compact Town Development and the Toyama Experience* (Co-edited, University of Tokyo Press, 2020), *Urbanists: Creators of Attractive Cities* (Editor, Chikuma Shinsho, 2021), and *The Public Space Movement in New York: Urban Reform Through Public Spaces* (Editor, Gakugei Publishing, 2023).

Feature Article #4: A Study on “Resorts” Research —Insights Gained from Casual Conversations

Tomoya Umekawa

Poorly Developed Stay-Oriented Resorts in Japan

The first basic concept I learned in tourism studies is that Japanese travel can be categorized into two types: Circuit travel and Stay-oriented travel. Japanese travel originated with activities such as hunting, ascetic practices, and pilgrimages. By the Edo period, as travel became more popularized, reaching destinations quickly via the well-developed network of national highways became a priority. Consequently, the travel style involved resting at post towns to recover before departing the following morning. If someone stayed for two or three nights at a post town, it would raise suspicion about what they were doing there. In other words, the basic principle was "one night, one meal," and this legacy can still be felt in some tourist destinations today.

Of course, considering the history of Japanese tourism development alongside the expansion of the railway network after the Meiji period, it is evident that Circuit travel became the standard.

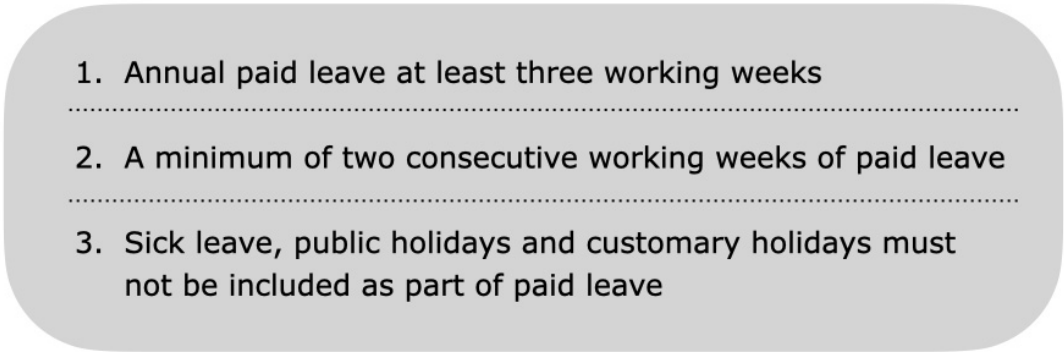
On the other hand, Stay-oriented travel has its roots in the long-standing tradition of Onsen Toji (therapeutic hot spring stays) and, after the Meiji period, villa stays. However, with the development of transportation, urbanization, and the rise of industrial society, these practices rapidly declined after World War II. In other words, both travel styles gradually lost their stay-oriented elements, and many tourist destinations seemed to shift toward promoting day trips or one-night, two-day visits, where longer stays might even be seen as undesirable.

Two Waves of Stay-Oriented Tourism Development

In Japan's postwar tourism policies, there were two notable periods when the focus shifted toward the development of stay-oriented tourist destinations (resort development). The first was in the 1970s, during the era of the New Comprehensive National Development Plan (New CNDP) before the oil crisis. The second was in the 1980s, during the era of the Fourth Comprehensive National Development Plan (Fourth CNDP) and the economic bubble. Both periods were characterized by steadily growing tourism demand, a time when simply developing facilities was believed to attract visitors. Research on resorts also flourished during these eras. In the initial stage, particular attention was given to the Languedoc-Roussillon region in France, which had been developed under the leadership of

the French government since the 1960s and was gradually taking shape as a model. Research focused not only on the physical aspects of resort development and construction but also on the long-term vacation system and the "Vacation Law," which had been enhanced since the 1930s as a foundational framework. The development of resorts as infrastructure and the creation of systems to stabilize demand were meant to function as two interdependent elements. However, the latter was gradually forgotten. As a side note, it is worth mentioning that the Japanese government has still not ratified ILO Convention No. 132(Figure 1).

(Figure 1) **International Labor Organization Convention No. 132** (1970)

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1. Annual paid leave at least three working weeks
 2. A minimum of two consecutive working weeks of paid leave
 3. Sick leave, public holidays and customary holidays must not be included as part of paid leave

My First Steps in "Resort" Research

I apologize for the personal anecdote, but my first foray into resort research was during my student years, when I conducted a study titled "Factors Influencing the Selection of Ski Resorts." Using skiers shopping for equipment at sports stores in Ochanomizu, Tokyo, as my sample, I conducted calculations on "multiple regression analysis" and "quantification theory" with the newly introduced HITAC 8300, a large-scale computer from Hitachi Ltd., at my university. While now commonplace, the availability of SPSS (Statistical Package for the Social Sciences), which was rare at the time, was a significant advantage. That said, this was an era without personal computers, Lotus 1-2-3, or Excel. Due to the lack of memory storage, data was entered on paper punch cards. Each punch card represented one sample. Every calculation began by feeding a large stack of punch cards into the mainframe computer. I often set the process to run overnight, expecting the printouts to be ready by morning. However, I frequently arrived at the computer room only to find the printer jammed with tangled paper. Despite these challenges, I was deeply engrossed in working with the computer. While this may sound like a story from the past, such was the state of research on the demand side of resorts (which could also be called consumer studies) at that time.

The Cutting-Edge Ski Resort Development Planning Techniques of the Japan Travel Bureau

Aspiring to become a ski resort planner, I was hired by the research division of the Japan Travel Bureau Foundation (hereafter referred to as "the Foundation"). At that time, the Foundation did not have a dedicated recruitment department, so I took the employment examination and interview for JTB Corp. (then known as Japan Travel Bureau Co., Ltd.). I vividly remember being asked about Tomamu, a ski resort in Hokkaido that had opened the previous year, during the final interview with the company president. At the time, it was likely known that the Foundation had been commissioned to develop the resort plan for Tomamu.

At the time, Japan Travel Bureau Co., Ltd. was actively developing and managing ski resorts across the country. It had recently developed and opened Sapporo Kokusai Ski Resort in Sapporo City. The Foundation had formulated the master plan and dispatched personnel to Sapporo Resort Development Corporation to accumulate expertise spanning from planning to operations. What was particularly outstanding was their development of a demand forecasting model for ski resorts, which provided a scientific approach to planning. Most of the staff came from backgrounds in social engineering or landscape architecture, enabling a shift from traditional tourism promotion based on "intuition and experience" to the formulation of resort development plans grounded in data analysis.

As an aside, in *GALA: The Story of Business Creation* (Information Center Publishing Bureau), Michitaro Yamaoka, who served as the president of GALA Yuzawa Ski Resort at the time of its opening, recounts the events surrounding the creation of JR East's GALA Yuzawa Ski Resort, the first major project following the privatization of Japan National Railways. He writes, "We requested a demand forecast from the Japan Travel Bureau, renowned as an authority on tourism surveys, but they declined, saying they couldn't do it for free." In reality, it was not a formal commission but a request for pro bono cooperation.

The Establishment of the "Resort Development Study Group"

We recognized this as a second opportunity to develop stay-oriented tourist destinations and had high expectations for the Fourth Comprehensive National Development Plan (Fourth CNDP) and the subsequent enactment of the Comprehensive Recreation Area Development Act, commonly known as the "Resort Law." The law had three objectives: enhancing leisure activities for the public, promoting regional development, and expanding domestic demand through the introduction of private sector initiatives. At the time, Japanese automobile exports accounted for the majority of the U.S. trade deficit, creating an

unusual situation. The Resort Law was one of the economic policies aimed at expanding domestic demand, implemented in conjunction with the Plaza Accord, which sought to strengthen the yen. It was the first time I came to understand that tourism policies derived from economic policies, rather than being pure tourism initiatives, often result in distorted outcomes.

The Foundation took on the secretariat role for the Resort Development Study Group (hereafter referred to as "the Study Group"), a membership organization comprising representatives from industry, government, academia, and finance, on June 3, 1987. On a personal note, I was initially told that my involvement would last only a year, but, for better or worse, I ended up serving in this role for 15 years.

The Study Group was founded primarily through the efforts of three key individuals: Tadao Umezawa, Takasuke Watanabe, and Juichi Hara. The honorary advisors of the Study Group included four distinguished individuals: Zenichi Ito, Tadayoshi Suzuki, Shuichi Tsubata, and Yoshinosuke Yasoshima. Additionally, there were 16 advisors comprising lawyers, critics, and university professors. As policy advisors, representatives from six ministries responsible for the Resort Law at the time participated, along with the Economic Planning Agency, the Environmental Agency, and the Ministry of Labor (all as they were then known). The members consisted of private companies and prefectural governments, with the latter serving as the main entities responsible for drafting plans. At its peak in 1990, the Study Group was a large organization with 102 members, including 93 private companies and 9 prefectural governments. The purpose of the organization was to guide private companies, which often prioritized hard infrastructure and profit, toward promoting "appropriate" resort development.

The first symposium, held on July 20, 1987, approximately one month after the organization's establishment, remains particularly memorable. The symposium was themed "Private Sector Initiatives and Resort Development," and one of the advisors, the late Professor Takasuke Watanabe from Tokyo Institute of Technology, delivered a lecture titled "Why Resorts Now?" The ten expectations he presented at the time (Figure 2) are, in my view, still relevant today.

(Figure 2) **Expectations for Resort Development**

1. Expectations for the creation of a new national culture for the 21st century
2. Expectations for industrial and economic model changes and restructuring
3. Expectations as an attractive investment target
4. Expectations for regional revitalization and employment promotion
5. Expectations as a "patron" nurturing national culture
6. Expectations for being the first step in building a new urban framework (resort city)
7. Expectations as a market for the development of new infrastructure
8. Expectations from the perspective of international prestige and global comparisons
9. Expectations as a concept for regional development and infrastructure planning
10. Expectations as a testing ground for integrated and complex policies

Source : "Resort Development," First Issue. Prof. Takasuke Watanabe, Tokyo Institute of Technology.

(Figure 3) **Series: Learning from Resorts Around the World**

1	Hawaii	USA	First Issue	December 1987
			Special Issue	January 1992
2	Languedoc-Roussillon	France	Issue 2	March 1988
3	Mediterranean Club	—	Issue 3	March 1988
4	Baden-Baden	West Germany	Issue 3	July 1988
5	Whistler	Canada	Issue 4	January 1989
6	Queensland (Gold Coast, etc)	Australia	Issue 4	January 1989
7	American Golf Resorts (Palm Beach, etc)	USA	Issue 5	July 1989
8	Kananaskis Country	Canada	Issue 6	May 1990
9	Vail	USA	Issue 7	September 1990
10	Costa Smeralda	Italy	Issue 8	January 1991
11	Resort Origins in England (Brighton, etc)	UK	Issue 9	January 1991
12	St. Moritz	Switzerland	Issue 10	January 1992
13	Zermatt	Switzerland	Issue 10	January 1992
14	New Caledonia	(French Territory)	Issue 11	September 1992
15	Auto Campgrounds (Palm Springs, etc)	USA	Issue 13	January 1994
16	Los Cabos	Mexico	Issue 20	January 2001

Source : "Resort Development" (Resort Development Study Group)

The Mainstream of "Resort Studies" Shifts to International Research

The activities of the Study Group consisted of regular bi-monthly meetings and an annual symposium. The mainstream of resort studies focused on "learning from international examples." The first domestic site visit was to Sahoro, home to the Mediterranean Club (now Club Med), which had just been introduced to Japan at the time. There was much to learn, including its all-inclusive system and the unique G.O. (Gentils Organisateurs) staff system. The second visit was to Onikoube Ski Resort in Miyagi Prefecture, developed by Mitsubishi Estate Co., Ltd., a member of the Study Group. This was a comprehensive resort that included not only a ski area but also a hotel and a golf course. The Foundation participated in drafting the basic plan for the hotel, which was inspired by the Tyrol region. The visit provided valuable insights into the high standards of the facilities and the creation of comfortable spaces.

The first overseas study tour focused on "North American Ski Resorts." The destinations included Park City and Deer Valley in Utah; Aspen Snowmass, Vail, Beaver Creek, Breckenridge, and Keystone in Colorado; and Whistler Blackcomb, Lake Louise, and Sunshine Village in Canada. There was much to learn, including grooming techniques, ski-in/ski-out accessibility, ski center design, the annual pass system, and the functional layout of base towns. It became clear to me that, while Japan has numerous ski areas, it is virtually devoid of true ski resorts.

These overseas studies were compiled into articles published in the journal *Resort Development* (Figure 3).

Three Noteworthy Resort Studies

During the 1980s and 1990s, I was heavily involved in practical work related to resort research, such as surveys and planning. However, the following three resort studies remain particularly memorable.

1. Tokyo Institute of Technology

A Series of "Resort Studies" by Professor Takasuke Watanabe's Laboratory

Domestically, the research focused on villa areas around the Kanto region, while internationally, it examined resort cities. In the former, Hiroyuki Yasujima and Akira Soshiroda conducted research, while in the latter, graduate students pursued master's theses exploring how resort cities such as Cannes, Nice, Brighton, and Florida developed and evolved.

2. Urban Planner

"Large-Scale Resort Development" by Tadao Umezawa

The resort studies conducted by Tadao Umezawa, an urban planner who graduated at the top of his class from the Department of Urban Engineering at the University of Tokyo and later became a private-sector urban planning consultant, primarily focused on large-scale resort city developments. His work emphasized projects such as France's Languedoc-Roussillon and the major resort cities such as Las Vegas and Orlando in the United States. He is remembered as a key figure who, based on international research, sparked a resort development boom.

3. Rural Resorts and *Resort Archipelago*: A Critique of Large-Scale Resort Development

In 1990, Makoto Sato of Kumamoto University published *Resort Archipelago* (Iwanami Shinsho), which had a significant impact on society. During an era described as an unprecedented resort boom, the book's warning about societal pathologies such as excess liquidity, massive developments, and the fierce competition among municipalities to attract projects was highly significant. Furthermore, it proposed rural resorts as a model for Japanese-style resorts and explored the ideal way of resort living.

Resort Studies as Academic Research

A search for "resort" in the Scientific and Technical Information Dissemination and Exchange System yields a total of 776 results as of August 2024. The results include 6,952 journal articles, 520 conference papers and abstracts, 267 research and technical reports, 380 review and general information articles, and 3 others. The top five authors are Akira Soshiroda(39), Takaaki Uda(36), Masaaki Kureha(20), Takasuke Watanabe(18), Fumihiko Sunamoto(15). The top five journals are: Journal of the City Planning Institute of Japan (183), Journal of the Agricultural Engineering Society (169), Journal of Architecture and Planning (Transactions of AIJ) (145), Journal of Rural Planning Association (112), and Japanese Journal of Human Geography (98). By publication year, the top results are: 2017 (269), 1991 (268), 2018 (263), 2019 (263), and 1993 (254).

A search for "resort" in the National Diet Library Digital Collections yields 12,824 results. Among these, there are 35 doctoral dissertations, summarized in Figure 4. While

engineering dominates, the dissertations span a diverse range of disciplines, including agriculture, economics, law, literature, environmental science, and natural sciences.

Conclusion

I recognize that research in the field of tourism generally involves a reciprocal relationship between "academia" and "practice," where each influences the other. One subfield, "resorts," has long been in a challenging position. While the necessity of resorts is acknowledged, their development approaches and methods have faced significant criticism. For nearly 30 years following the burst of the economic bubble, even the term "resort" itself became difficult to use. During this period, the number of academic studies, such as doctoral dissertations on this topic, remained at a modest total of just 35, as previously mentioned. On the other hand, practical developments in the field appear to have made much greater progress. At the very least, the term "resort" has not faced the same stigma overseas, where resort development and investment have advanced in response to demand.

As Japan aspires to become a tourism-oriented nation and aims to create internationally competitive destinations, I hope to see renewed research on "resorts" and "resort development" in light of the "lost 30 years" following the economic bubble. In particular, I hope that insights from resort development can contribute to enhancing the "spatial quality" of tourist destinations, especially in areas where Japan lags behind. This includes improving the external environment of tourist areas and overall comfort, such as through planting and landscaping, signage and lighting design, techniques for deliberate aging to create a sense of historical depth, and fostering vernacular aesthetics that reflect the character of the land.

(Figure 4) Doctoral Dissertations on "Resorts"

1. **Research on River Planning in Lowlands**
Author: Takao Kodera (1991, Hokkaido University, Engineering)
2. **Research on the Development of Tourism Capital and Local Responses**
Author: Toshiyuki Tsuchiya (1991, University of Tokyo, Agriculture)
3. **Research on Coastal Resort Design Methods**
Author: Hiroaki Shimada (1992, Kyoto University, Engineering)
4. **Fundamental Study on Visual Simulation Techniques for Landscape Design**
Author: Kenji Yoshida (1992, Nihon University, Engineering)

5. **Sociological Analysis of Regional Development and Environmental Conservation**
Author: Takao Inoue (1992, Hosei University, Sociology)
6. **Research on Recreational Use and Forest Management Planning in Japan**
Author: Shigeyuki Miyabayashi (1992, Kyushu University, Agriculture)
7. **Research on the Spatial Composition of Hot Spring Areas in Japan**
Author: Akio Shimomura (1993, University of Tokyo, Agriculture)
8. **Comparative Study of Resort Development in Korea and Japan**
Author: Jungdae Kim (1995, University of Tokyo, Agriculture)
9. **Research on Cultural Transformation, Presentation Design, and Landscape Management Planning in Tourism Development Areas**
Author: Noriaki Nishiyama (1995, Kyoto University, Engineering)
10. **Fiscal and Administrative Issues in Inland Development: Regional Case Studies in the Tokai Area and Gifu Prefecture**
Author: Kunihiro Kakimoto (1995, Aichi University, Economics)
11. **Research on Visitor Facility Selection Behavior and Planning Proposal Evaluation**
Author: Masato Ujigawa (1996, University of Tokyo, Engineering)
12. **Research on Fashion and Textile Businesses in Cities and Resorts**
Author: Takeshi Otani (1997, Shinshu University, Arts and Sciences)
13. **Research on the Evolution of Industry and Cities**
Author: Masayuki Sasaki (1997, Kyoto University, Economics)
14. **Postwar Japanese Sports Policies: Structures and Developments**
Author: Harunami Seki (1997, Hitotsubashi University, Sociology)
15. **Theory and Analysis of Political Communication**
Author: Yutaka Oishi (1998, Keio University, Law)
16. **Interregional Comparative Analysis of Urban Tourism between Japan and Korea**
Author: Chang-Hoon Lee (1999, Kyushu University, Comparative Culture)
17. **Research on Coastal Resort Design Methods**
Author: Hiroaki Shimada (2000, Kyoto University, Engineering)
18. **Study on the Spiritual Development of Young People in Arishima Takuro's Works**
Author: Hiromi Kurita (2000, Tokyo Metropolitan University, Literature)
19. **The Structural Crisis of Japanese Forestry and Challenges for Reconstruction**
Author: Hidehisa Kurotaki (2000, Tokyo University of Agriculture, Agricultural Economics)

20. **Historical Study of International Resort Development in Modern Japan**
Author: Fumihiko Sunamoto (2001, University of Tokyo, Engineering)
21. **Current Status of ABC in Japan and Research on the Development Direction of ABM**
Author: Kenichi Suzuki (2001, Osaka University, Economics)
22. **The Birth of Okinawa's Image: The Process of Tourism Resortization After the Okinawa Ocean Expo**
Author: Osamu Tada (2003, Waseda University, Literature)
23. **Accounting Study on the Bankruptcy of Third-Sector Corporations: Financial Analysis of the Resort Industry's Management Conditions**
Author: Masahiro Sakata (2005, Hiroshima University, Management)
24. **Research on the Development of Parks, Green Spaces, and Coastal Resorts in Dalian**
Author: Zhang Dan (2012, University of Tokyo, Engineering)
25. **Development of Small-Scale Ger Camps in Mongolia and Regional Revitalization: A Case Study of Ger Camps Around Ugi Lake in Arkhangai Province**
Author: Chinbayar Tserenbat (2014, Tokyo Metropolitan University, Tourism Science)
26. **Research on the Development of Villa Areas in the Prewar Period: Focused on the Former Atami Town in Shizuoka Prefecture**
Author: Kanako Akazawa (2016, Nihon University, Engineering)
27. **Research on Human Behavior Analysis Using Spatial Information**
Author: Nobuhiko Yoshimura (2018, Hokkaido University, Environmental Science)
28. **Management Strategies and M&A of Major European Travel Companies: A Historical Review of the European Travel Industry**
Author: Shinji Kamio (2019, Saitama University, Management)
29. **Mechanisms of Local Labor Market Formation in International Mountain Resorts: A Case Study of Whistler, Canada**
Author: Yuzuru Komuro (2020, University of Tsukuba, Natural Science)
30. **Rethinking Relationships Between Resort Enterprises and Local Communities Focused on Personal Communication: Two Case Studies in Shimukappu Village, Hokkaido**
Author: Shiho Jin (2020, University of Tsukuba, Natural Science)
31. **Geographical Study on Ski Resort Development in the Niseko Area Viewed from Real Estate Information**
Author: Daisuke Shiozaki (2021, Hokkaido University, Literature)

32. **Structural Changes in Japan's Ski Resorts with the Development of International Tourism: Focusing on Changes in Actor Composition in Resorts**
Author: Nao Yoshizawa (2023, University of Tsukuba, Natural Science)
33. **Geographical Study on Lifestyle Migration to Resort Areas in and Around Metropolitan Areas: Focusing on the Perspective of Lifestyle Migration Research**
Author: Shuto Suzuki (2023, University of Tsukuba, Natural Science)
34. **Research on New Urban Development and Tourism Policy Using IR (Integrated Resorts) on Reclaimed Land**
Author: Hajime Tsuruta (2024, Tokyo Institute of Technology, Engineering)
35. **Appropriate Forest Management in Indonesia's Bukit Barisan Selatan National Park's Bija Resort and Its Buffer Zone**
Author: Anggi Mardiyanto (2024, Kyoto University, Environmental Studies)



Tomoya Umekawa

Professor

Kokugakuin University

Department of Tourism and Community Development

For nearly 40 years, the author worked on the revitalization and regeneration of resorts and tourist destinations at the Japan Travel Bureau Foundation. After stepping down as a board member in 2018, he served as a Specially Appointed Professor at the College of Tourism, Rikkyo University, before assuming his current position in April 2020. His areas of expertise include tourism planning, tourism policy, destination management, and tourism-oriented community development. He also serves as a part-time lecturer at Tokyo Woman's Christian University and as a committee member for organizations such as the Japan Tourism Agency, the Agency for Cultural Affairs, Mie Prefecture, and Kanagawa Prefecture.

Feature Article #5: The Impact of Climate Change on Experiences in Natural Parks

Tetsuya Aiko

In natural tourist destinations, including national parks, various activities take place against the backdrop of natural landscapes such as mountains, seas, rivers, and lakes. The natural experiences offered in these locations provide unique value that cannot be found elsewhere or through other activities. However, such experiences can be compromised by overuse beyond the environmental carrying capacity, inappropriate usage practices, inadequate facilities or management systems on the receiving side, and the development of infrastructure or services that disregard the characteristics of the natural environment. Furthermore, it has been reported that many of these attractive locations are increasingly being affected by climate change. These include, of course, glaciers at risk of melting due to global warming and coastal areas threatened by rising sea levels. In Japan, it has been suggested that the famous "Omiwatari" phenomenon on Lake Suwa may become a "sight unseen" (Kobayashi, 2024). While various fields of natural sciences have reported the impacts of climate change and identified it as a factor contributing to societal uncertainty, research on its effects in the context of park usage and tourism remains limited. Looking ahead, what roles should research institutions and scholars play in devising mitigation and adaptation strategies for climate change in natural parks and similar areas?

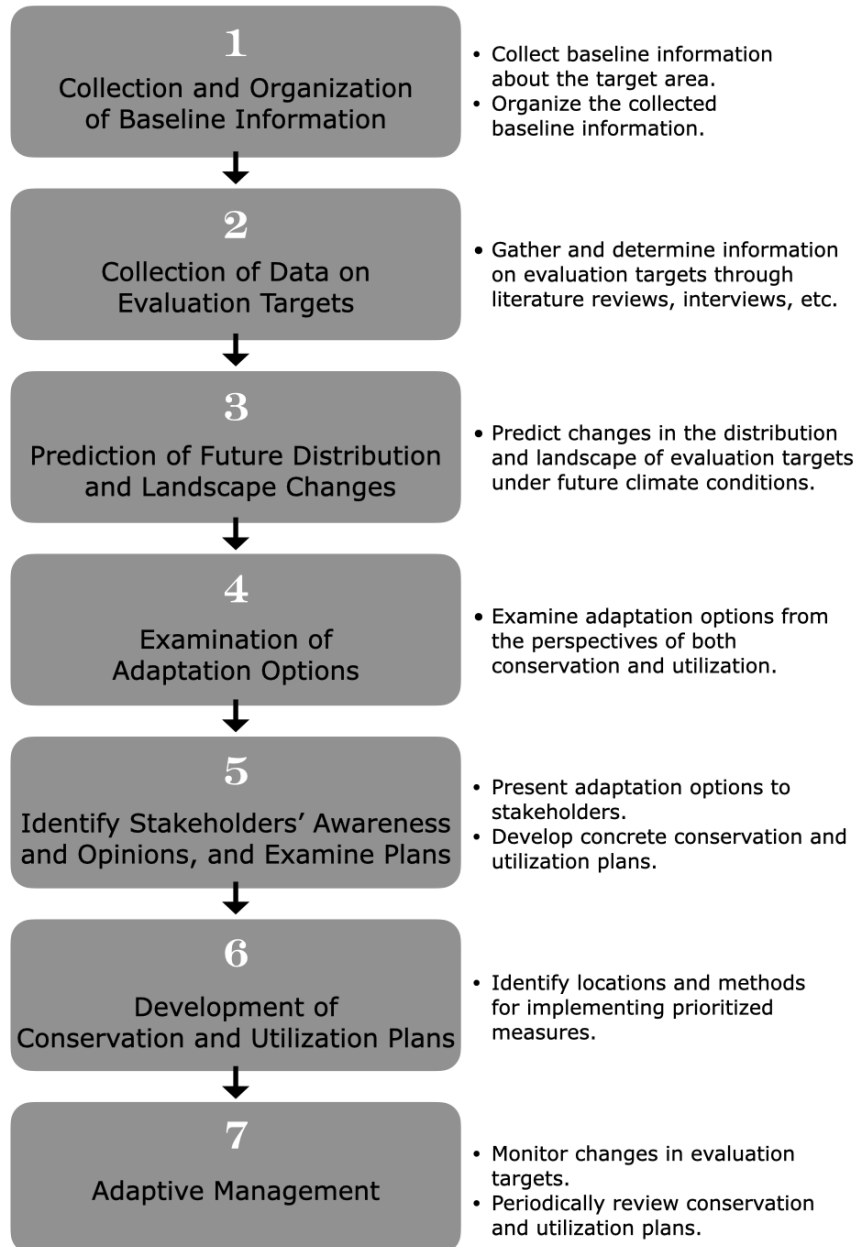


(Photo1) The Chinguruma (*Geum pentapetalum*) Colony Spreading Across Susoaidaira in the Taisetsuzan Mountains

The National Institute for Environmental Studies has conducted future projections of the area of alpine meadows in Taisetsuzan National Park. Their research findings indicate that if greenhouse gas emissions continue at the current pace, alpine vegetation may nearly disappear, potentially being replaced by subalpine forests up to the vicinity of the mountaintops (Amagai et al., 2022). The expansive alpine meadows, along with the gently sloping mountaintop areas that turn vibrant with autumn foliage, are iconic landscapes of Taisetsuzan and attract numerous hikers and tourists (Photo 1). Research findings indicating a decrease in snowfield grasslands and wind-exposed grasslands, coupled with an increase in dwarf bamboo communities due to global warming, have become a major concern for local mountain and tourism industry stakeholders. Additionally, in recent years, there have been reports from stakeholders in Taisetsuzan that the timing of snowmelt is advancing, leading to earlier blooming periods for alpine plants. Changes in the natural environment that shape these landscapes have the potential to significantly impact the behavior of tourists visiting these destinations as well as the tourism industry itself. However, understanding and predicting these impacts remain insufficiently developed.

In Europe, the impact of global warming on tourism, particularly in the Alps, has become a significant concern. Substantial research has already been conducted, leading to the development of concrete countermeasures. In Austria, the duration and depth of snow cover have significantly decreased since 1950, which is expected to have a substantial impact on winter sports, such as skiing, and the tourism industries associated with them (Pröbstl-Haider et al., 2021). To address these challenges, research institutions and scientists from various fields have come together to study the impacts of climate change on tourism and to explore adaptation strategies. Their findings have been compiled into reports following discussions with stakeholders. According to the report, adaptation measures to address global warming are required at the national, destination, corporate, and tourist levels. It emphasizes the need for each sector to act based on a clear vision, including reducing greenhouse gas emissions, enhancing energy efficiency, and developing or adopting new technologies. Additionally, the report highlights the importance of providing appropriate information to tourists, grounded in an understanding of their decision-making processes. Particularly in the area of information dissemination, insights from not only natural sciences but also fields such as economics and environmental psychology are deemed essential. Proposals include understanding how tourists perceive the risks of climate change and the effectiveness of adaptation measures, and how they incorporate these perceptions into their behavior. Other suggestions involve providing financial support and incentives to tourism operators, developing communication methods to influence consumer behavior, and applying research methods to clarify decision-making processes and trade-offs.

(Figure 1) **Steps for Developing Climate Change Adaptation Measures in Protected Areas** (Ministry of the Environment, 2019)



In Japan, the Ministry of the Environment published the *Guidelines for Developing Climate Change Adaptation Measures in Protected Areas such as National Parks* in 2019. The guidelines highlight alpine vegetation in Taisetsuzan and coral reefs in the Kerama Islands as case studies and outline seven steps for formulating adaptation measures to address the impacts of climate change (Figure 1). The guidelines emphasize the necessity of scientific

monitoring, adaptive approaches, consensus-building among stakeholders, information sharing, and capacity building. However, many of the proposed adaptation measures are primarily focused on ecosystem conservation. In Taisetsuzan, adaptation measures include prioritizing bamboo cutting and trail management based on visibility from hiking trails. In the Kerama Islands, measures involve selecting suitable diving locations based on predictions of coral mortality. These serve as illustrative case studies. While the importance of conserving the foundational ecosystems is unquestionable, the guidelines lack discussion on the economic impacts on the tourism industry or changes in tourist behavior, as seen in the Austrian case.

In the Shiretoko World Natural Heritage area, the Scientific Committee has initiated discussions on an "Adaptive Management Strategy for Climate Change." It provides a framework for assessing the impacts and risks of reduced sea ice and shorter ice duration, caused by rising air and water temperatures, on marine mammals, fish, seabirds, vegetation, and terrestrial mammals, while developing appropriate adaptation measures. What enables this framework is the foundation laid by the Scientific Committee, which serves as an advisory body for the sustainable management of the World Natural Heritage area. This includes a long-term monitoring plan and platforms for information and opinion exchange with local stakeholders.

Although tourism businesses and tourists have not yet been explicitly incorporated into the climate change adaptation strategy in Shiretoko, the long-term monitoring efforts include ongoing interviews with local stakeholders, including tourism operators, to gather insights on changes observed in the field. The findings include observations such as: "A decreasing trend in snowfall and snow depth, with shorter snow-covered periods," "Reduced operable days for winter tours of the Shiretoko Five Lakes due to the effects of warm winters," "A decline in fish populations caused by rising sea temperatures, leading to seabirds like cormorants and gulls abandoning cliff nesting," "Earlier snowmelt preventing bears from hunting deer, a key food source in early spring," and "Squirrels' cached nuts becoming more susceptible to consumption by deer and bears." These insights are scattered throughout the reports. In practice, at the Shiretoko Five Lakes, changes in snow-covered periods have led to partial modifications of winter routes. While other factors also play a role, the impact of climate change on visitor numbers and tourism businesses has yet to be fully recognized. Nevertheless, the significance of continued monitoring remains substantial.

To evaluate the impacts of climate change, it is essential to accumulate long-term monitoring data, apply scientific knowledge for assessment, and build consensus among stakeholders to implement adaptive measures. However, not many regions have the capacity to establish a framework comparable to that of a World Natural Heritage site. Therefore, research institutions with specialized knowledge and extensive experience, as

well as researchers who focus on natural tourist destinations, play a crucial role. The Japan Travel Bureau Foundation conducts various surveys on tourism trends, with the results being accumulated and made publicly available. For example, could the landscapes listed in the nationwide evaluation of tourism resources, *The Beautiful Japan National Tourism Resource Register*, already be showing signs of the impacts of climate change? In U.S. national parks and similar areas, the method of repeat photography is used to document long-term changes in natural landscapes. The author has also begun collecting and comparing photographs in areas such as Taisetsuzan (<http://lab.agr.hokudai.ac.jp/hsla/aikoh/site/cocoen/index.html>). In this era of uncertainty about the future, stable organizations capable of conducting ongoing research are essential for reflecting on past changes and preparing for future predictions. It is crucial to document changes in the local natural environment and landscapes, share necessary information with stakeholders, and engage in collaborative discussions. To develop mitigation and adaptation strategies for climate change in natural tourist destinations, enhance the sustainability of tourism businesses, and encourage concrete behavioral changes among tourists, a broad range of knowledge—including humanities and social sciences such as tourism studies—is required. Continuous efforts and proactive information dissemination are essential in achieving these goals.



Tetsuya Aiko

Professor

Graduate School of Agriculture Research Faculty of Agriculture
Hokkaido University

Originally from Kagoshima Prefecture, the author researches topics such as the carrying capacity of natural parks, visitor management, urban park planning, and citizen collaboration in green space management. Published works include *Survey on Nature Conservation and Use* and *Visitor Behavior and Experiences*.

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Feature Article #6: To Record, Discuss, and Experiment within an Uncertain World — Reflecting on unchanging landscapes and evolving regions and people

Kiyotatsu Yamamoto

The pride fostered by unchanging landscapes

For the author, a member of the second baby boom generation, the hitmaker Tetsuya Komuro, who once dominated the music scene, is an unavoidable figure. Though an old story, a television program aired at the end of 2016 featuring Tetsuya Komuro walking through London, the city that inspired his signature sound, while reflecting on the behind-the-scenes stories of his songwriting. Opinions about him may vary widely, whether in terms of admiration or criticism. However, his remark during the program, "(London) makes you feel that growing older isn't something unpleasant" was particularly striking. As I reflected on how Komuro himself has aged, I couldn't help but find his words deeply evocative. Is Japan a country that makes people feel as though growing older is inherently negative? In recent years, issues such as accumulated debt, declining birthrates, population aging, population decline, regional stagnation or disappearance, and a shortage of stewards to manage local resources have been repeatedly discussed, painting a grim picture of the nation's future. Looking at the population pyramid, one cannot help but feel alarmed by the imbalance projected between the elderly and the working-age population. The structure clearly illustrates how the elderly impose a burden on the younger generation. In such a scenario, aging itself risks being perceived entirely as a societal ill.

However, even from a general perspective, aging itself is not inherently a negative. As the proverbs say, "The elderly are the treasure of the household," and "Doctors and miso improve with age." Wisdom borne of experience is something that should not be easily dismissed. In March 2014, I had the opportunity to visit the United Kingdom to observe footpaths—trails designed for the enjoyment of walking. Before the pandemic, I used to spend about three weeks each year hiking in U.S. national parks with students. As a result, I was undeniably enamored with America. My impression of the U.K. prior to my visit was that of a former empire with the largest territorial reach in history, a nation of serious-minded people, unappetizing food, and a dull landscape devoid of mountains. However, from the moment I rented a car in London and merged onto the motorway, I was met with a series of surprises. First, there was no visible concrete on the highways. To be precise, efforts had been made to ensure it wasn't noticeable. Even on regular roads, the ubiquitous white guardrails commonly seen in Japan were absent. As I approached the curves of narrow roads, towering stone walls, meticulously stacked, loomed close, evoking a sense of unease. Yet, no matter how far I drove, there were no obtrusive man-made structures to disrupt the scenery.

I learned that in the Cotswolds region, which I visited (Photo 1), local volunteers are actively involved in maintaining and managing the stone walls that gradually erode over time. They meticulously restack new stones as needed—a process that incurs considerable costs. However, this effort results in a seamless and stunning rural landscape stretching from the foreground to the horizon, harmonizing beautifully with the historic stone-based townscape. It reflects the resilience and enduring sustainability of the region's cultural landscape. According to statistics from 2018 and 2019, the average lifespan of a house is 39 years in Japan, 56 years in the United States, and 79 years in the United Kingdom. Such durability is far beyond the reach of Japan, where dramatic cycles of scrap-and-build have defined its urban landscapes. Moreover, stepping into a pub, I was treated not only to meals featuring local herbs but also to enthusiastic tales of regional pride. At the time, I couldn't help but inwardly think, "They don't even have notable agricultural products compared to the northeastern Tohoku region where I lived." Yet, as I left the pub and walked down the dimly lit streets of the town, where the lighting was so subdued that faces were barely recognizable, I was struck by the pride of an elderly couple who seemed to silently ask, "What could possibly be more interesting than our town compared to London?" It left a deep impression on me. At the same time, I couldn't help but feel a pang of envy.



(Photo 1) The picturesque countryside of the Cotswolds region in the United Kingdom

Amid the ongoing efforts to rebuild following the 2011 Great East Japan Earthquake, I have consistently felt that people seek and deeply need unchanging elements in the places and spaces where they have lived their lives. The enduring landscapes I observed in the UK are not entirely static; they gradually evolve over long periods through meticulous maintenance and management. Yet, they undeniably contribute to a sense of security in life and foster a deep pride in the local community. We often equate "unchanging" with being "outdated," and at times, it can even evoke a sense of unease. However, observing an unchanging landscape allows us to place ourselves within a broader timeline, offering a sense of perspective and grounding. This, in turn, might enable us to embrace the process of aging with a sense of enjoyment—a thought I can't help but entertain.

Evolving regions and shifting perceptions and aspirations of people

Ten years have passed since my experience in the aforementioned Cotswolds region.

In fact, I am currently staying in a rural town in England as I write this. Unlike urban areas, the suburban and rural natural landscapes—still shrouded in mist and dotted with sheep pastures established in the 17th century—retain an unchanging charm. However, I've noticed a shift: rental cars now include hybrid models that combine gasoline refueling with electric charging. Additionally, while some parking payment machines at footpath trailheads still accept only cash in the form of coins, many have adopted a cashless payment system integrated with smartphone apps (Photo 2). Moreover, popular tourist destinations such as castles and palaces have adopted a reservation system, making it impossible to gain entry without prior booking. Elderly individuals in the UK have impressively mastered the use of apps, seamlessly enjoying both the towns and the great outdoors. It leaves a strong impression that, without much fanfare, the systems for accommodating travelers at tourist destinations have undergone significant, albeit gradual, changes.

Looking back over the past decade, the tourism environment has been shaped by numerous unpredictable events, including natural disasters, the outbreak of the COVID-19 pandemic, the eruption of wars, and soaring prices. These factors have significantly impacted not only the tourism industry but also the individuals who seek to enjoy travel. Particularly during the pandemic, travel restrictions caused a significant stagnation in the tourism industry, forcing many accommodations and restaurants in Japan's tourist areas to close—a memory still fresh in our minds. Like myself, I believe many were both shocked and disheartened to confront the pervasive shadow of uncertainty that enveloped the entire world. On the other hand, the rapid recovery of tourism and the surge in travelers in the aftermath have sparked various issues worldwide. This has reignited discussions around overtourism, a topic that had already been debated before the pandemic, prompting

renewed efforts to reassess and address its challenges. In fact, at the International Geographical Union conference held in Dublin at the end of August this year, numerous cases were presented showcasing the implementation of new visitor management systems and the strengthening of regulations in tourist destinations struggling with overtourism. Tourist destinations are working to protect critical resources while advancing IT, ICT, and DX initiatives, spurred by the experiences of the COVID-19 pandemic. These developments are enabling regions not only to secure their own financial resources but also to digitize visitor awareness and behavior, allowing for the formulation of more strategic visitor management plans. From this perspective, I am surely not the only one curious about how far Japan has progressed in these efforts.

Equally significant is the evolving awareness of those who visit tourist destinations. It is well known that a consciousness of returning to nature emerged following the Industrial Revolution. Similarly, in Japan, after the Meiji Restoration and the anti-Buddhist movement (haibutsu kishaku), the necessity of protecting cultural assets was widely recognized, laying the foundation for some aspects of modern preservation systems. Additionally, during Japan's period of rapid economic growth and the generalization of automobile-based tourism, much of the country's land became the focus of resort development. While these developments were criticized, it is also important to recognize that such spaces were in demand within the public consciousness at the time. Furthermore, in the aftermath of major natural disasters such as earthquakes and tsunamis, there is an increased awareness of safety. These events compel a shift in attitudes, prompting people to reconsider how to coexist with both the blessings and the threats that nature presents. As history demonstrates, societal transformations and natural phenomena have continuously shaped and reshaped human awareness. In the realm of tourism, it is widely recognized that shifts in societal and individual values have driven movements toward transformation. These include transitions from mass consumption to sustainable consumption, from passive observation to active experiences, and from circuit travel to stay-oriented, interactive travel. Such changes have significantly influenced traveler preferences and behaviors.

The role of researchers and academia in an era of uncertainty

In an era characterized by uncertainty and unpredictability, what should tourism-related research aim to achieve? For example, hazardous events include earthquakes, tsunamis, volcanic eruptions, and epidemics. Moreover, phenomena related to climate change—such as typhoons, heavy rainfall, and droughts—not only become more extreme but also occur with increasing frequency, amplifying the associated risks. While tourism studies rarely engage directly in elucidating the mechanisms behind such events, the aforementioned

pandemic had a profoundly negative impact on specific industries and sectors. It is essential to document and analyze both the scale of these impacts and the effectiveness of the measures taken in response. By doing so, we can better minimize the effects and facilitate a faster recovery when the next pandemic occurs.

From the perspective of landscape and tourism planning, it is evident that what sustains and preserves seemingly unchanging landscapes are the lives, livelihoods, and industries of the people. However, changes in these regional activities are often subtle and go unnoticed, making them inherently vulnerable to hazardous events. I have previously conducted research aimed at contributing to the restoration of grasslands and the revival of tourism in Aso (Photo 3). However, with the decline in activities such as livestock farming, controlled burns, and grass harvesting, the grasslands have been shrinking. Compounding these challenges, the Kumamoto Earthquake and the pandemic dealt significant blows to the tourism industry, which remains in the process of recovery even today. When engaging with a region, researchers have a crucial role in prompting discussions around key questions: What are the values that make the region appealing to travelers? What values must be preserved? And what are the threats to those values? Addressing these fundamental points is essential for guiding sustainable regional development.

Furthermore, the awareness and preferences of individuals are intricately linked to the readiness of tourist destinations, with both evolving in response to one another. While researchers should remain attuned to these changes, the role of academia lies in systematically transforming experiences into knowledge and wisdom. It is equally important to support experimentation to determine whether these insights can be applied to other cases. For example, national parks in the United Kingdom, like those in Japan, are characterized by inhabited areas within their boundaries. Due to the numerous roads providing access to the parks, there are no gates or entrance fees, unlike the system commonly seen in the United States. However, as mentioned earlier, parking fees are designed to be conveniently paid through apps, with proceeds contributing to nature conservation. This system asks visitors to share some of the financial burden. While there were several instances where the system appeared broken or incomplete, it might be reasonable to tolerate a certain level of error in such setups. The 2022 Beijing Olympics women's curling final was a showdown between Japan and the UK, humorously described as a battle between two island nations with a shared love for green tea and black tea. Interestingly, in 2021, during the height of the COVID-19 pandemic, the UK conducted a social experiment by holding a soccer match to study the impact of such events on the spread of infections. The UK's society, which embraces trial and error and encourages challenges, makes me tempted to grumble that such a mindset is lacking in Japan. Perhaps it's just a sign that I've grown too old.



(Photo 2)
Parking fee payment machines
integrated with smartphone apps



(Photo 3) The vast landscape of Aso, where grassland
restoration efforts are underway



Kiyotatsu Yamamoto

Associate Professor

Graduate School of Agricultural and Life Sciences

The University of Tokyo

Born in 1973 in Kochi Prefecture, aged 51. After serving as an Assistant Professor at the Graduate School of Agricultural and Life Sciences, The University of Tokyo, and as an Associate Professor at the Faculty of Agriculture, Iwate University, he has held his current position since October 2017. Ph.D. in Agriculture, The University of Tokyo. Specializing in landscape architecture and tourism studies, his research focuses on methodologies for environmental conservation and spatial planning, with study fields including World Heritage sites, national parks, and tourist destinations. He currently serves as an Executive Director and Chair of the Academic Committee of the Japan Institute of Tourism Research.

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Feature Article #7: The Role That Tourism Research Should Fulfill —Consideration from the perspective of precisely capturing causal relationships

Takeshi Moriguchi

The author conducts research in the field of marketing, where the precise capture of causal relationships has become a significant challenge, not only within marketing but also across the broader domain of social sciences. In the field of tourism, accurately capturing the causal relationships between tourism marketing initiatives and promotion strategies implemented by businesses or local governments and the behavior of tourists is considered a critical challenge. In this paper, from the perspective of a marketing researcher, I will discuss the idea that accurately capturing such causal relationships is a crucial role that tourism research and researchers should fulfill.

Many businesses engage in various marketing activities to influence changes in consumer behavior and attitudes. Additionally, in recent years, data on consumer purchase histories and behavioral histories have been increasingly accumulated in practical settings, and such data is now widely utilized in marketing research. On the other hand, it is typically very challenging to precisely capture causal relationships between initiatives and responses using real-world data.

For example, many companies implement promotional strategies such as targeting customers with coupons or discounts. Even if the sales of customers who received coupons significantly increased compared to those who did not, it cannot be concluded that the entire difference is attributable to the effect of the coupons. When companies implement promotional strategies, they typically target customers who are likely to purchase the product. These customers might have achieved high sales even if they had not received the coupons. When measuring the effects of initiatives using real-world data, there is usually a bias stemming from the fact that the initiatives are often implemented for a specific subset of customers. Therefore, analyses that account for such biases are necessary.

To accurately capture the causal relationship between marketing activities and consumer responses while accounting for such biases, it is essential to appropriately employ analytical methods known as causal inference and to meticulously design and conduct surveys and experiments. On the other hand, since implementing these approaches requires advanced expertise, accurately capturing causal relationships is considered one of the essential roles that researchers should fulfill.

The importance of accurately capturing causal relationships has long been strongly recognized in fields such as medicine, where methodologies like Randomized Controlled Trials (RCTs) have been developed and refined. RCT is a method in which participants are randomly divided into multiple groups. The test group is administered the drug under

investigation, while the control group is given a placebo. The efficacy of the drug is then evaluated by comparing the outcomes between the two groups.

An example of an RCT is the clinical trial conducted by Pfizer for its COVID-19 vaccine. Pfizer's clinical trial examined the number of COVID-19 cases and severe cases among approximately 20,000 participants in the vaccine group and an equal number in the placebo group following administration. As a result, during the observation period, 8 individuals in the vaccine group developed COVID-19, compared to 162 individuals in the placebo group. The figure of 8 individuals in the vaccine group represents approximately 5% of the 162 individuals in the placebo group. From this, the vaccine's efficacy was calculated to be 95%. This indicates that vaccination reduced the risk of developing COVID-19 by 95%. RCT is considered the most effective method for rigorously measuring such effects.

In recent years, the use of RCTs in research has been increasing across the broader field of social sciences. For example, the three economists Abhijit Banerjee, Esther Duflo, and Michael Kremer, who were awarded the 2019 Nobel Prize in Economic Sciences, have evaluated policies aimed at reducing global poverty through field experiments utilizing RCT methods, often referred to as randomized field experiments. Randomized field experiments have also been increasingly utilized in marketing research in recent years.

Many companies in the internet industry routinely conduct randomized field experiments known as A/B testing. For example, two versions of a product description page, A and B, are created and randomly presented to site visitors. By comparing the click-through rates or purchase rates of the two groups, the effectiveness of the page design can be evaluated.

Of course, click-through rates and purchase rates are influenced by factors other than page design, such as visitor attributes, preferences, and inclinations, as well as the day of the week or time of day the site was visited, the device used, and the communication speed. However, by randomizing the assignment to either A or B, these factors are theoretically balanced between the groups. That said, when the number of participants in each group is small, random biases may still occur, making it necessary to have a sufficiently large sample size. Moreover, the theoretical advantage of minimizing bias applies not only to observable attributes but also to unobservable factors. Consequently, by comparing outcomes such as purchase rates between the groups, it becomes possible to measure the effect of a factor without bias.

A well-known example of using A/B testing to improve a website is the 2008 presidential campaign of Barack Obama's team. They utilized A/B testing to evaluate the design of the homepage images and the call-to-action buttons leading to the conversion page on their campaign website. As a result, the improved design achieved a conversion rate approximately 40% higher than the original design (Source: Optimizely website).

Thus, randomized field experiments are a method that involves grouping real-world consumers who engage in consumption and purchasing activities randomly, allowing for the clear identification of the relationship between factors and outcomes. This approach possesses numerous advantageous characteristics. On the other hand, in real-world settings, it is often challenging to conduct experiments by randomly dividing participants due to physical or ethical constraints. Therefore, many alternative methods have been studied, such as matching techniques that select comparable test and control groups with similar attributes and conditions from existing data, and natural experiments that leverage situations resembling experiments occurring naturally in typical environments. Additionally, research in fields such as causal inference is advancing to develop methods for eliminating biases like those mentioned above when analyzing existing data.

As described above, accurately capturing causal relationships is an extremely important challenge across many fields, both academic and practical, and this should also hold true in the domain of tourism. As the weight of the tourism industry in the Japanese economy grows, the importance of tourism promotion strategies is increasing, while issues such as overtourism are also becoming more apparent. Various measures are being implemented to address these issues, but accurately assessing their effectiveness and enhancing their impact is a critical challenge not only for the tourism industry but also for Japanese society as a whole. From this perspective as well, rigorously measuring the effects of tourism-related initiatives is considered a vital role that tourism research and researchers should fulfill.

*This article was partially written with reference to Takeshi Moriguchi (2018), "A Review of the Current State and Challenges in Empirical Research on Consumer Behavior," Introduction to *Empirical Research on Consumer Behavior* (Chuoikeizai-sha).



Takeshi Moriguchi
Professor
Faculty of Commerce
Waseda University

Graduated from the School of Political Science and Economics, Waseda University; completed the doctoral program at the Graduate School of Tokyo Institute of Technology; Ph.D. in Engineering. After serving at institutions such as Rikkyo

University, he assumed his current position in 2005. He has held various roles, including Dean of the Graduate School of Commerce at Waseda University, President of the Japan Association for Consumer Studies, and Vice President of the Japan Society of Marketing and Distribution. His major publications include Promotion Effect Analysis (Asakura Shoten), Introduction to Marketing Science (Yuhikaku Arma, co-authored), and Empirical Research on Consumer Behavior (Chuokeizai-sha, co-edited). His areas of expertise are marketing and consumer behavior theory.

Feature Article #8: Strategies for Overcoming the Structural Low-Wage Problem in the Hospitality Industry

Tadayuki Hara

In the hospitality industry, which serves as the core of a diverse range of tourism-related sectors, a pronounced "labor shortage" has become a widespread concern. On the supply side of the labor force, Japan's population has begun to decline, as evidenced by the population pyramid showing age-specific population distribution. The operational model, based on labor-intensive strategies established during the Showa era and premised on the rapid population growth that accelerated from the 1950s, is now reaching a breaking point. On the demand side, while Japan's domestic travel demand recovery following the pandemic has not been supported by measures akin to the United States' approach of providing three rounds of direct stimulus payments to individuals—leading to a surge in discretionary consumer spending on tourism-related industries and driving rapid economic recovery—the situation in Japan is shaped by a different dynamic. Specifically, the rapid growth of inbound tourism, an external shock absent in the U.S. context, is beginning to disrupt the equilibrium between tourism demand and supply. This disruption is exerting upward pressure on wages in certain regions.

This paper aims to present concrete strategic action plans on how to leverage the disruption in the balance of tourism supply and demand to address the over 30-year trap of low wages and long working hours in the hospitality industry, while linking these improvements to enhancing the quality of life for local residents. To achieve this, the discussion will first outline the methodological framework for strategy formulation before delving into the proposed strategies.

1. Strategy Formulation

The author teaches that strategy formulation involves three key steps, as outlined in hospitality management courses at U.S. universities. These steps are:

1. Understanding the Current Situation
2. Defining the Ideal Vision
3. Setting a Time Frame for Transition

1-1. Understanding the Current Situation

In other words, to drive meaningful change in the current situation, it is essential to first develop an accurate understanding of the present state. For example, if you wish to drive to Tokyo Disneyland from your current location but your car navigation system cannot accurately determine your starting point, it will be unable to provide directions—whether to go straight, turn right, or turn left at the next intersection. In the process of understanding the current situation, uncomfortable truths and criticisms may arise. However, confronting them head-on rather than avoiding them is the crucial first step toward meaningful reform.

This is where cultural differences between Japan and the United States become apparent. In Japan, there seems to be a stronger tendency to hesitate or avoid confronting the current situation compared to the United States. It is reminiscent of middle-aged individuals reluctant to undergo a health check-up, avoiding the doctor out of fear of being told uncomfortable truths such as "high body fat percentage," "lack of exercise," or "fatty liver." This avoidance mirrors the resistance to facing unpleasant realities head-on. From the perspective of having experience in academia, government, and industry in both Japan and the United States, a notable difference lies in how individuals perceive the acknowledgment of unfavorable realities. In Japan, formally acknowledging unfavorable realities often results in the current person in charge being held solely accountable, including taking on the responsibilities of predecessors and past leadership. This is perceived as inequitable and potentially damaging to one's professional record, fostering a strong tendency to avoid confronting the situation and to defer addressing it. In contrast, in the United States, identifying and fully disclosing the issues in the current situation is seen as an opportunity, as the credit for any subsequent improvements is attributed to the current person in charge. This perspective reduces any sense of hesitation or reluctance toward acknowledging the present challenges. Conducting a thorough understanding of the current situation can also serve as a means of self-preservation. It provides a basis for creating a record that demonstrates which indicators have improved since the individual took charge and which deteriorations have been prevented, thereby constructing an "alibi" to support their management efforts.

1-2. Defining the Ideal Vision

When defining the ideal vision, it is essential to incorporate as many quantitative metrics as possible. Without such specificity, it becomes difficult for successors or future generations to objectively evaluate progress or outcomes. Additionally, in situations such as a change in evaluators, a shift in organizational leadership, or a government transition (common in the

United States), creating an environment where objective evaluations can be made regardless of the individuals or circumstances involved is crucial. Quantifying goals provides the advantage of minimizing the influence of human subjectivity and personal biases, ensuring more consistent and impartial assessments.

1-3. Setting a Time Frame for Transition

Once the current situation is understood and the ideal vision is defined, the next step is to determine the time frame for the transition. Rather than limiting the plan to a single year, periods of at least three years for short-term goals and 10 to 20 years for medium- to long-term objectives are commonly used. By incorporating clear numerical targets for both the current state and the ideal vision, these time frames can be divided to allow for annual progress checks, ensuring that steady advancement toward the goals can be monitored.

2. Current Situation in Japan's Hospitality Industry

2-1. Current Situation on the Demand Side of the Hospitality Industry

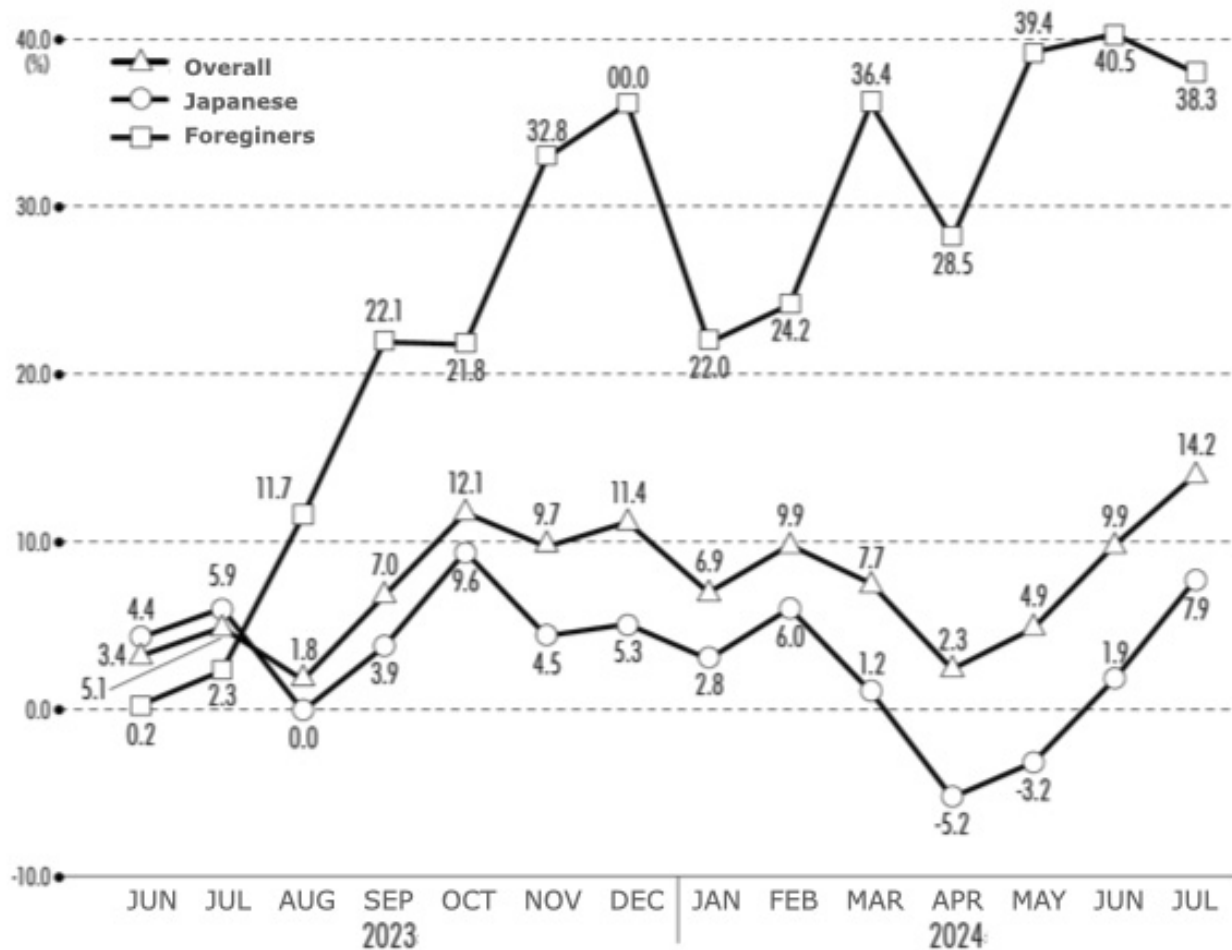
As of 2024, the tourism industry can be considered thriving. However, it is evident that this success is primarily driven by inbound tourism, particularly by foreign visitors to Japan, as had been anticipated for some time. According to the 2023 annual data from the Japan Tourism Agency's Tourism Statistics and Accommodation Survey, the total number of overnight stays reached 617.47 million (a 37.1% increase year-on-year). Of these, overnight stays by foreign visitors accounted for 117.75 million (a 613.5% increase year-on-year). Foreign visitors accounted for 19.1% of the total overnight stays, meaning nearly 20% of accommodation demand originated from inbound tourism.

(Source : <https://www.mlit.go.jp/kankocho/content/001751247.pdf>)

When examining the figures up to July 2024 on a monthly basis and comparing them to the same months in pre-pandemic 2019, it becomes evident that the growth in Japan's accommodation demand is being driven primarily by inbound tourist demand (Figure 1).

(Source :[Japan Tourism Agency Statistics] Record Overnight Stays in July: Highest Monthly Total for Foreign Visitors, Highest July Figures for Japanese Travelers – Tourism Economics News (kankokeizai.com))

(Figure 1) Trends in Total Overnight Stays Compared to the Same Months in Pre-COVID 2019(%)



According to the preliminary figures from the Japan Tourism Agency's Accommodation Travel Statistics Survey, the total number of overnight stays at accommodation facilities nationwide in July 2024 reached 59.15 million. This represents a 14.2% increase compared to the same month in 2019, prior to the COVID-19 pandemic, and an 8.6% increase compared to July 2023. Among these, the number of foreign visitors recorded a new all-time high for a single month. The number of overnight stays by Japanese visitors also reached a record high for July, the highest since comparable statistics began in 2010.

The number of overnight stays by foreign visitors increased by 38.9% compared to July 2019 and by 35.2% compared to the same month in 2023, reaching 14.94 million in July 2024. The strong performance of inbound travel demand continued, with April 2024 surpassing 14.5 million overnight stays, marking a new record. Compared to the pre-COVID period, the figures have been positive for 13 consecutive months since July 2023, showing a clear trend of surpassing pre-pandemic levels.

The demand recovery in 2023, driven primarily by inbound tourism, reveals disparities when analyzed by prefecture. In the three major metropolitan areas (Tokyo, Kanagawa, Chiba, Saitama, Aichi, Osaka, Kyoto, and Hyogo), accommodation demand increased by 16.0% compared to 2019. In contrast, regional areas (the remaining 39 prefectures) saw a 22.1% decline. Despite these differences in recovery pace, as indicated by Figure 1, it can be anticipated that the growth in inbound demand will continue to drive the overall increase in accommodation demand moving forward. Although inbound tourism spending fell below 1 trillion yen during the pandemic, the government's target of achieving 15 trillion yen in annual inbound tourism spending by 2030—just six years from now—remains a realistic possibility. This would require a compound annual growth rate exceeding 30%, but the current pace of growth appears sufficient to meet this target. From a domestic perspective in Japan, one might question whether such a growth rate can be sustained. However, taking a broader view from an international standpoint—considering Japan's unique characteristics such as pricing levels, safety standards, and overall attractiveness—the steady growth of the global economy is likely to translate directly into increased inbound tourism demand. This suggests that stable growth on the demand side can be reasonably anticipated.

2-2. Supply Side of Accommodation: Issues with Employee Working Conditions

2-2-1. Wage Income by Industry Sector

While demand is being driven by the increase in inbound tourism, it is essential to examine the supply side—particularly the labor force and personnel costs, which represent the largest input and expense items in accommodation operations.

The position of the hospitality industry relative to other sectors will be analyzed using statistical data from the National Tax Agency.

(Source : <https://www.nta.go.jp/publication/statistics/kokuzeicho/minkan/top.htm>)

Figure 2 categorizes Japan's industries into 14 sectors and organizes them by the average annual income of salaried workers, including both regular and non-regular employees (Source: All About). In this broad classification, the hospitality industry is grouped together with food service, takeaway and delivery food service industries under the same sector (Figure 2).

(Figure2) Aggregated data based on the 2020 National Tax Agency Private Sector Salary Survey

Industry	Male	Female	Total
Electricity, Gas, Heat Supply, and Water Utilities	7,667	5,299	7,147
Finance and Insurance	8,139	4,167	6,297
Information and Communications	6,804	4,420	6,111
Construction	5,584	2,959	5,090
Academic Research, Professional and Technical Services, Education, Learning Support	6,171	3,703	5,029
Manufacturing	5,773	3,023	5,014
Miscellaneous Service Businesses	5,287	3,421	4,518
Transportation and Postal Services	4,830	2,682	4,443
Real Estate and Leasing	5,210	3,031	4,234
Medical and Welfare Services	5,448	3,393	3,968
Wholesale and Retail	4,958	2,394	3,722
Service Industry	4,328	2,495	3,525
Agriculture, Forestry, and Mining	3,644	2,232	2,999
Accommodation, Food, and Beverage Services	3,421	1,718	2,513
Total	5,322	2,926	4,331

This data aggregates the average wages of salaried employees (including non-regular workers such as part-timers, temporary workers, dispatched workers, contract employees, and commissioned workers) who were employed at private companies for one year, categorized by industry type and gender.

Source: 2020 Survey on the Actual Status of Salaries in Private Companies (National Tax Agency).

What becomes evident here is that the accommodation and food service industry ranks at the lowest level in terms of annual income among the 14 sectors, both on an overall basis and when broken down by gender. In the tourism industry, particularly in its core sector of hospitality, many business owners cite a "labor shortage" due to the increase in inbound tourists. However, the reality is not a lack of labor but rather a "lack of workplace appeal" caused by inadequate compensation.

The annual income for men in the accommodation and food service industry stands at 64% of the average annual income across all industries, while for women, it is 58% of the average. In Japan's industries, where a gender disparity in income is prevalent, the average annual salary across all industries for men is 5.32 million yen, compared to 2.92 million yen for women, or 54% of the male average. However, in the accommodation and food service industry, the disparity is even more pronounced, with men earning 3.43 million yen and women earning 1.72 million yen, or only 50% of the male average. This highlights the notably lower treatment of women in this sector compared to the national average. Looking at the top industry sector, Electricity, Gas, Heat Supply, and Water, men earn an average of 7.67 million yen, while women earn 5.29 million yen, with women's income at 69.1% of men's. In contrast, the Wholesale and Retail Trade sector shows an even worse gender

disparity, with women earning only 48.2% of men's income, a ratio lower than that of the accommodation and food service industry.

Of course, regarding the relatively low annual income of women, some argue that this is partly due to the constraints of the spousal tax deduction system, where individuals voluntarily choose lower-paying jobs to stay within its income limits. This system, as defined under the Income Tax Act, allows for certain income deductions if a taxpayer has dependents who meet specific criteria. One such criterion is that the dependent's total annual income must not exceed 1.03 million yen for salaried employees, including part-time workers, temporary staff, or those in non-regular employment. There are industry sectors where annual incomes far exceed the 1.03 million yen threshold. For women earning at least the average annual income of female salaried workers, 2.92 million yen, it can be assumed that their post-tax income would surpass the benefits of keeping their income below the 1.03 million yen threshold for the spousal tax deduction.

2-2-2. Wage Income by Employment Type

Next, we examine the income disparity between regular and non-regular employment types. Although the data is not available by industry sector and is instead aggregated across all industries, it still highlights critical points of importance (Figure 3).

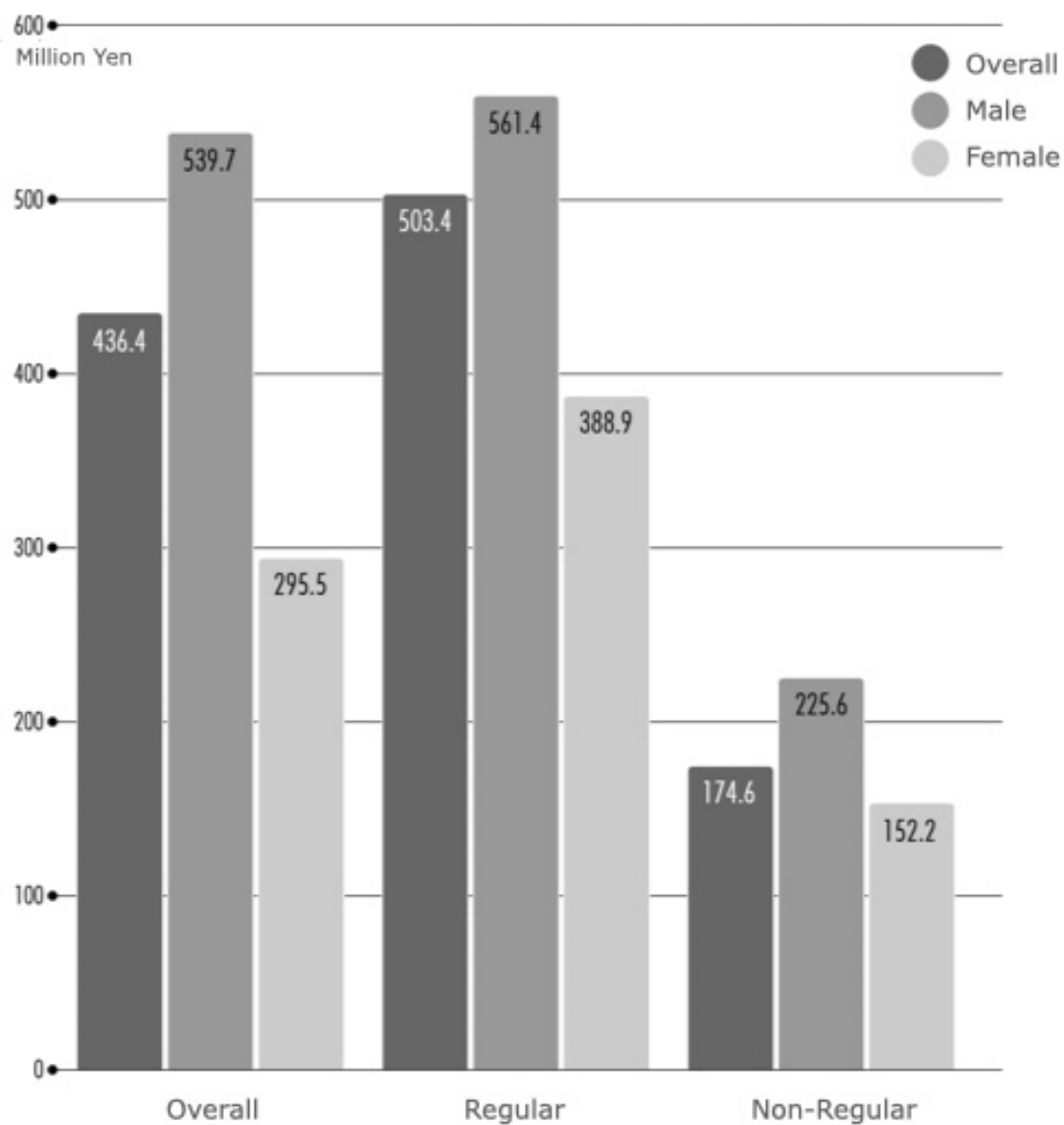
According to the latest data for fiscal year 2022, the average annual income for regular male employees was 5.607 million yen, while for regular female employees, it was 3.64 million yen. In contrast, non-regular male employees earned 2.267 million yen, and non-regular female employees earned 1.529 million yen. Over the past four years, both the income disparity between regular and non-regular employment and the gender income gap have remained largely unchanged, as shown in Figure 3.

2-2-3. Proportion of Regular and Non-Regular Employees

According to publicly available data from the Statistics Bureau of the Ministry of Internal Affairs and Communications (Source: Report on the Results of the 2022 Employment Status Survey [stat.go.jp]), as of October 1, 2022, the total number of employed persons was 67.06 million (36.71 million men and 30.35 million women), with the employment-to-population ratio at 60.9%. Breaking this down by employment type, 54.0% were regular employees, 31.6% were non-regular employees, and 14.4% fell into other categories (7.6% self-employed, 5.3% corporate executives, and 1.5% family workers). Estimating the size of the non-regular workforce yields $67.06 \text{ million} \times 0.316 =$ approximately 21.19 million. Looking at the distribution across primary, secondary, and tertiary industries, 73.9% of employed persons were engaged in the tertiary sector. Within this breakdown, employees in the

accommodation and food service industry accounted for 5.6% in 2022. Estimating the number of workers in this sector yields: $67.06 \text{ million} \times 0.739 \times 0.056 =$ approximately 2.77 million employees.

(Figure3) Average annual salary per salaried worker employed throughout the year (2019)
(By Employment Type and Gender)



According to data from the Equal Employment Opportunity Division of the Employment Environment and Equal Employment Bureau, Ministry of Health, Labour and Welfare (Source : <https://www.mhlw.go.jp/content/11901000/001101169.pdf>), the number of non-regular employees in 2022 was 21.01 million, of which 6.69 million were men and 14.32 million were women. This indicates that women accounted for 68.1% of all non-regular employees (p. 11). A report from 10 years ago by the Statistics Bureau of the Ministry of Internal Affairs and Communications in 2013 also pointed out that "approximately 70% of non-regular employees are women." This indicates that over the past decade, the majority of non-regular employees being women has remained unchanged.

2-2-4. Number of Employees and Gender Ratio in the Accommodation and Food Service Industry

Although explicit data by industry sector is unavailable, it is possible to make estimations. According to the aforementioned data from the Ministry of Health, Labour and Welfare, the gender breakdown of employees in the accommodation and food service industry in 2022 shows that 1.2 million were men and 2.1 million were women (pp. 18–19). This means that out of a total of 3.3 million employees in this sector, 63.6% were women.

2-2-5. Annual Income in Major Companies within the Hospitality Industry

For publicly listed companies, this information is publicly available, and we will examine it accordingly (Figure 4).

(Source: Average annual salaries in the hotel industry (Top 10 listed companies) jinzaitemshokuroot.jp)

(Figure4) Average annual salary of top 10 listed companies in the hospitality industry

Company Name	Average Annual Income (10,000 yen)	Average Age
Seibu Holdings	811.2	40.9
Kyoritsu Maintenance	363.4	42.5
Resort Trust	583.4	36.5
Fujita Kanko	526.8	38.9
Imperial Hotel	503.1	40.1
Greens	478.6	39.1
Royal Hotel	398.5	44.0
Resol Holdings	603.5	39.1
Washington Hotel	418.3	40.7
Kyoto Hotel	364.2	39.1

(Figure5) National average salary table for U.S. hospitality workers: annual, monthly, weekly, and hourly earnings

Wage	Annual Salary	Monthly Pay	Weekly Pay Hourly
Top Earners \$33	\$68,500	\$5,708	\$1,317
75th Percentile \$31	\$64,000	\$5,333	\$1,230
Average \$24	\$49,217	\$4,101	\$946
25th Percentile \$18	\$36,500	\$3,041	\$701

In the hotel industry, large publicly listed companies typically offer significantly higher annual incomes than the industry average of 2.51 million yen for the accommodation and food service sector cited in Figure 2. Moreover, the majority of these companies provide annual incomes that exceed the national average of 4.33 million yen for all industries, as also referenced in the same figure.

From an overview of the realities described in sections (2-1) through (2-5), the following observations can be made regarding the current state of the accommodation and food service industry:

- The annual income level for the accommodation and food service industry ranks the lowest (14th) among the 14 domestic industry sectors for overall, male, and female earnings.
- Regular employees in large corporations can achieve an annual income at or above the industry-wide average.
- As in other industries, the annual income for non-regular employees is low; however, there is particular concern regarding the extremely low income levels of female non-regular employees, which are among the lowest across all sectors.
- Women account for approximately two-thirds of the total workforce in the accommodation and food service industry. When combined with the prevalence of non-regular employment, this results in some of the lowest annual incomes across all domestic industries.
- What business leaders often describe as a "labor shortage" is, in reality, a "lack of workplace appeal" caused by the industry's persistently low-wage environment. This highlights the urgent need to transform the industry into one aligned with the broader concept of sustainability—not limited to environmental concerns but also encompassing the organizational and business model sustainability necessary for long-term viability.

2-2-6. Reference Comparison: Employment Statistics in the United States

Focusing on the hotel industry, the latest 2024 national average data in the United States is summarized in the table below (Figure 5).

(Source: ZipRecruiter: Salary: Hotel Employee (September, 2024) United States (ziprecruiter.com) — Compiled by the author)

Assuming an exchange rate of \$1 = 150 yen, the average annual income for hotel industry employees across the United States is approximately 7.38 million yen, with an average hourly wage of 3,600 yen.

For reference, Orlando, Florida—located in Orange County and the city with the highest number of annual visitors in the U.S. (74 million in 2023)—has an average annual income of \$45,945 (6.89 million yen at the same exchange rate) for hotel industry employees. This represents 93% of the national average. On an hourly basis, the average wage is \$22.3 (3,345 yen). Both annual and hourly wages reflect a significant disparity compared to working conditions in Japan.

At the University of Central Florida's Rosen College of Hospitality Management, where the author works, dozens of graduates each term join Management in Training Programs at global hotel chains in the United States. Prior to the pandemic, in 2019, the starting annual salary for these students was \$38,000 (5.7 million yen). Following the onset of the pandemic in April 2020 and the beginning of domestic tourism recovery in April 2021, the figure rose significantly. By 2022, the starting salary increased to \$53,000 (7.95 million yen), marking a 40% rise from 2019. In 2023, the figure further climbed to \$61,000 (9.15 million yen), representing a 60% increase compared to pre-pandemic levels.

(Source : Rosen-Professional-Internship-v7-low-res.pdf (ucf.edu))

In Orlando, the hourly wage for entry-level hotel positions for inexperienced workers increased from \$10 (1,500 yen) before the pandemic to \$16 (2,400 yen) from mid-2022 onward. This reflects a 60% rise in hourly wages post-pandemic, which has since become the norm. Notably, during the November 2020 presidential election, Florida voters, a majority of whom supported Republican candidate Donald Trump, also overwhelmingly approved a minimum wage law through a state referendum—an initiative typically not aligned with Republican policies. The proposal received a decisive 60.8% approval rate, enacting a state law to nearly double the minimum wage from \$8 (1,200 yen) at the time to \$15 (2,250 yen) over seven years, with a target completion in 2026. However, by 2022, just the third year of this transition, the rapid post-pandemic recovery in tourism demand had already driven wages in Orlando's hotel labor market above the final target set by the law.

(Source: Florida Amendment 2, \$15 Minimum Wage Initiative (2020) -Ballotpedia)

Effective Date		Florida Minimum Wage
January	1, 2021	\$8.65
September 30, 2021		\$10.00
September 30, 2022		\$11.00
September 30, 2023		\$12.00
September 30, 2024		\$13.00
September 30, 2025		\$14.00
September 30, 2026		\$15.00

(Figure 6) Annual progression of minimum wage rates under Florida’s minimum wage law

(Source : Florida's Minimum Wage Changes Through 2026 : Office of Human Resources (fsu.edu) — Compiled by the author)

3. Ideal Vision for Japan's Accommodation Industry

3-1. Establishing an Ideal Vision for the Tourism Industry

From the perspective of demand, the three major metropolitan areas (Tokyo, Kanagawa, Chiba, Saitama, Aichi, Osaka, Kyoto, and Hyogo) have already surpassed pre-pandemic levels, driven by inbound tourist demand, and the future outlook appears promising. However, on the supply side of tourism, the most significant input factor—labor—has seen wage levels rise to approximately 1,100 yen per hour, reflecting market conditions. Compared to the revised minimum wage levels set for 2024, it appears that wages exceeding this standard, projected to surpass 1,000 yen per hour after the revision, are becoming attainable in the three major metropolitan areas.

(Source: The impact of the 2024 minimum wage increase: strategies for small and medium-sized enterprises (neo-career.co.jp))

However, the typical short-term perspective prevalent in Japanese administrative practices, focusing only on the current and following fiscal years, fails to provide a clear direction for organizational and industry-wide reforms. Ideally, transitioning toward an envisioned ideal state over a period of about 10 years would be desirable. However, the following considerations necessitate a more focused and ambitious approach within a shorter timeframe: 1. The tourism industry is benefiting from favorable conditions, particularly the strong demand from inbound tourists. 2. To achieve the national strategic goal for 2030 of 15 trillion yen in annual consumption by inbound tourists (60 million visitors), it is essential to address labor-related bottlenecks not only in the three major metropolitan areas but also in regional economic zones. Given these factors, an ambitious vision should be set with a target achievement period of six years, culminating at the end of 2030. This timeframe aligns closely with feasibility while driving the necessary transformations. Clarifying such a direction is crucial as it fosters organizational and societal change towards a defined goal.

Ideal Vision for the End of 2030 (Uniform targets nationwide except for the three major metropolitan areas, with a 10% premium in those areas)

Accommodation Industry Workforce - Non-Regular Employees

- Women: Annual income of 3 million yen (equivalent to an hourly wage of 1,500 yen)
- Men: Annual income of 3.6 million yen (equivalent to an hourly wage of 1,800 yen)

This represents nearly a doubling of income for women and a 60% increase for men.

Accommodation Industry Workforce - Regular Employees

- Women: Annual income of 4 million yen
- Men: Annual income of 5.3 million yen

Women: Achieve a 30% increase above the national average for all industries, representing a doubling of the current levels within the accommodation industry.

Men: Achieve parity with the national average for all industries, reflecting a substantial increase from the current levels within the accommodation industry.

Accommodation Industry Managers

- Women: Annual income of 6 million yen
- Men: Annual income of 7.8 million yen

It would be reasonable to include as part of the ideal vision the establishment of annual income levels for roles essential to promoting inbound tourism, such as "foreign language tour guides" and "DMO personnel," equivalent to those of regular employees in the accommodation industry. This would enable both career advancement and life planning. Additionally, for DMO management positions, ensuring at least the same annual income levels as managerial roles in the accommodation industry should also be considered a key component of the ideal vision.

Setting a six-year timeframe from 2024 to the end of 2030 to achieve these goals establishes a clear strategy. By dividing the transition from the current state to the ideal vision into six equal parts, it becomes possible to define annual progress targets and evaluate outcomes on a yearly basis moving forward.

For example, if the annual income of non-regular female hotel employees in 2024 is 1.5 million yen, the ideal target of 3 million yen is clear. By calculating $(3 \text{ million yen} - 1.5 \text{ million yen}) \div 6$, an annual income increase of 250,000 yen would be required. Achieving this would necessitate improvements in the social environment and management practices to enhance employee treatment accordingly.

This allows for the establishment of quantitative annual progress targets as follows:

End of 2025: 1.75 million yen

End of 2026: 2.00 million yen

End of 2027: 2.25 million yen

End of 2028: 2.50 million yen

End of 2029: 2.75 million yen

End of 2030: 3.00 million yen

Such targets provide a clear roadmap, allowing for quantitative progress targets to be established.

3-2. Structural Improvements to the Work Environment in the Tourism Industry and Concrete Implementation Plans

The structural improvements to the work environment in the tourism industry outlined above, including ensuring annual income levels that enable both career advancement and life planning, are beneficial for securing personnel and talent within the accommodation sector. However, under conditions where other factors, such as revenue, remain unchanged, an increase in labor costs in the accommodation industry would naturally raise the operating expense ratio, thereby exerting downward pressure on current profits. The mission of private for-profit companies, especially corporations, is to "maximize shareholder value through the maximization of current profits." Relying on external factors such as government subsidies or regulatory revisions cannot drive the kind of swift and structural transformation required.

While the fundamental principle of capitalism—maximizing shareholder value through the maximization of current profits—may appear to conflict with this goal in the short term, improving industry-wide working conditions is essential for rebuilding the long-term appeal of the sector. To achieve this, the industry must take the initiative to develop strategic plans and leverage the favorable tailwinds of increasing labor market demand, seizing the opportunity to implement transformative changes when conditions allow. Working conditions in the accommodation industry, with the exception of regular employees in large corporations, have seen little significant improvement over the past 30 years. However, the sharp rise in inbound tourism demand in Japan following the pandemic suggests a scenario similar to that of the United States, where economic growth was driven by increased domestic consumer spending after the pandemic. This growth particularly benefited three major sectors: dining out, arts and entertainment, and the accommodation industry.

Therefore, analyzing the rapid economic recovery and improvements in working conditions within the accommodation industry in the United States can provide valuable insights for formulating strategic implementation plans to enhance working conditions in Japan's accommodation industry.

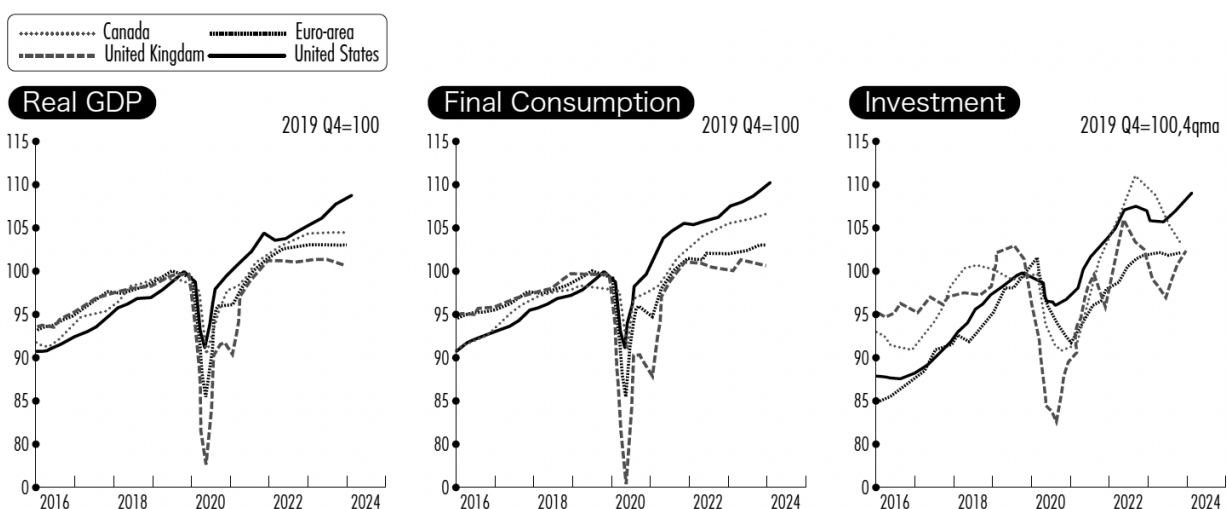
Analysis of Factors Behind the United States' Rapid Economic Recovery

The pandemic dealt a severe blow to the socio-economic landscape, including the tourism industry, in both Japan and the United States in April 2020. However, a key difference lies in the recovery timeline of the tourism sectors. In the United States, tourism demand began to recover 12 months later, in April 2021. In contrast, Japan's recovery started approximately 30 months later, in October 2022, when the country significantly eased its pandemic-related border control measures. (As of September 14, 2024, the number of COVID-19 deaths in the United States stands at 1,219,487, compared to 74,694 in Japan—a stark difference by an order of magnitude.)

The U.S. Federal Reserve has created a graph comparing the pace of economic recovery in the United States to that of Europe, the United Kingdom, and neighboring Canada. This graph uses the fourth quarter of 2019 as a baseline of 100 and shows growth rates for GDP, final demand (personal consumption), and corporate capital investment. It illustrates that GDP and personal consumption in the United States have recovered at a significantly faster pace, outperforming the comparison countries. While Canada temporarily surpassed the U.S. in capital investment growth, the U.S. has recently outpaced its peer group, demonstrating a distinct lead in growth rates. (Figure 7)

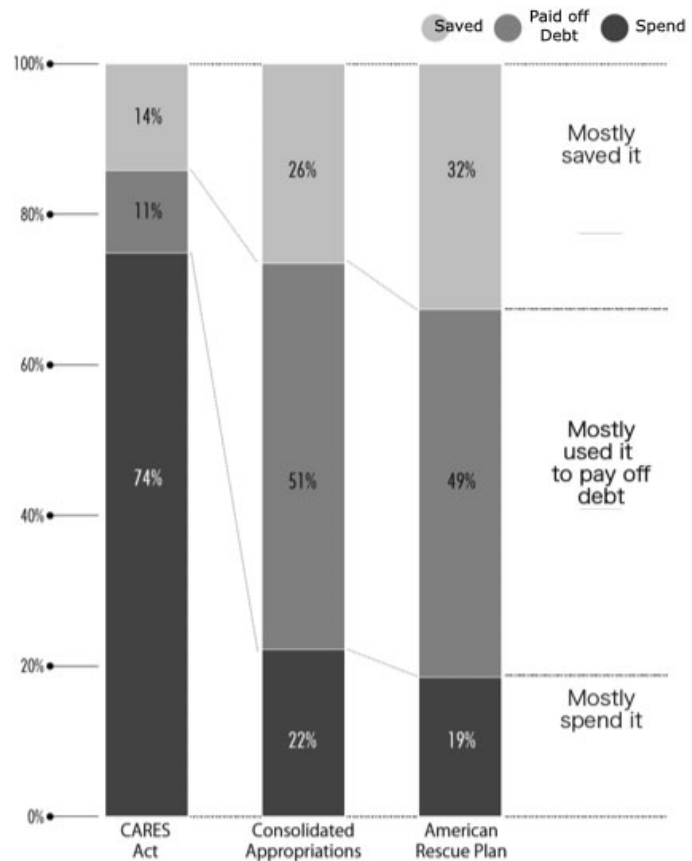
(Source : The Fed – Why is the U.S. GDP recovering faster than other advanced economies? (federalreserve.gov))

(Figure 7) Annual economic indicators for the U.S., Canada, the European bloc, and the U.K. since 2015 (Set at 100, with the fourth quarter of 2019 as the baseline)



The U.S. federal government issued three rounds of direct payments to individuals during the pandemic, with the third and final round—the American Rescue Plan—serving as the catalyst for the rapid resurgence in tourism demand. Under this plan, \$1,400 (approximately 210,000 yen) in cash was distributed per person, with income limits set generously at \$150,000 (approximately 22.5 million yen) or less for couples to qualify. A family of five (a couple with three children) could receive \$7,000 (approximately 1.05 million yen) in total—a significant amount. However, only 19% of the total funds received by recipients were used for immediate consumption (such as rent, utilities, groceries, and taxes), while the remaining 81% was allocated to savings and debt repayment. From the perspective of economists advocating for a primary balance approach, such payments might be deemed entirely wasteful. However, much of the debt repayment by Americans went toward settling short-term credit card debt. This allocation effectively increased their available credit limits, creating a perception among U.S. consumers that their disposable liquid funds had grown, thereby stimulating spending. Combined with the cash saved, this increase in liquid assets became the catalyst for a surge in discretionary consumer spending by U.S. consumers over the following two years. This surge in personal consumption was the driving force behind the rapid recovery. (Figure 8)

In Japan, the *Go To Travel* campaign provided subsidies conditional on traveling, whereas in the United States, the payments were distributed without such conditions. As a result, spending was directed toward specific industry sectors in the U.S., particularly: 1. Dining out, 2. Arts and Entertainment, 3. Accommodation. As a result, personal consumption was directed toward increased service consumption in tourism-related industries.



(Figure8) Use of funds from the three rounds of Individual stimulus payments in the United States

Analysis of the Mechanism Behind the Rapid Improvement in Working Conditions in the Accommodation Industry

Since the onset of COVID-19 in April 2020, tourism-related industries faced significant challenges. Non-regular employees were dismissed, while regular employees experienced zero overtime. In some cases, they were subjected to furloughs—a temporary leave of absence during which employees retained their positions but did not receive salaries for a certain period. In other words, the number of employees was reduced to the bare minimum. By April 2021, 12 months later, guests began to return, and consumer spending surged into a state of "revenge spending" on activities they had been unable to enjoy during the 12-month pandemic period. This sudden surge in demand left the tourism-related industries, with the accommodation sector at their core, facing a severe labor shortage.

1. A rapid surge in labor costs to accommodate increasing demand

In Orlando, industry responses varied. Some companies continued to offer pre-pandemic wages (starting hourly rates for inexperienced workers at \$10, approximately 1,500 yen), while others raised wages to address the acute labor shortage. Hotels and facilities hesitant to improve working conditions faced a rise in resignations and employee turnover, resulting in absolute labor shortages that forced them to close some guest rooms or restaurant sections. Meanwhile, companies that proactively increased wages to retain employees and attract new talent effectively led the market in wage hikes. By July 2021, just four months later during the summer season, the market hourly wage had surged by 60% to \$16 (approximately 2,400 yen). More than three years have passed since then, and the market hourly wage is now around \$17. While there has not been a sharp increase like in 2021, wages have remained elevated and stable at this higher level.

2. Management and owners fully passed on the increased labor costs to retail prices

For business owners hesitant to raise labor costs, particularly base wages, a surge in external demand, as seen post-pandemic, presents two options: either avoid the increased costs and forgo the rapidly growing business opportunities, or accept higher labor costs and operating expenses to capture the business. In the case of Orlando, those who chose the latter approach and adopted a strategy of fully passing on the increased labor and operating costs to retail prices emerged as the winners. This method proved sustainable for both management and owners. There are likely to be those in Japan who argue for a reduction in demand due to "price elasticity"—the assumption that consumers will avoid higher prices, leading to decreased demand. However, consumers motivated by revenge

spending did not reduce their consumption at all. On the contrary, they fully absorbed the retail price increases, resulting in not only sustained demand but also an increase in occupancy rates. When tourism demand is so high that it disrupts market supply-demand balance, the argument of price elasticity becomes entirely irrelevant. Instead, both average room rates and occupancy rates increased significantly, as evidenced by a 90% year-over-year increase in annual lodging tax revenue in 2022, compared to a 40% decline in 2020. (Figure 9) The trends in lodging tax revenue vividly demonstrate the remarkable resilience of revenge spending. However, such fluctuations in tax revenue are observed only under a fixed-rate lodging tax system, which raises a separate issue.

Table : Orange County FL Tourism Development Tax Annual Revenues

Year	Tourist Development Tax	Tax %	Change %
2014	\$201,400,252	6.0%	7.72%
2015	\$226,178,591	6.0%	12.30%
2016	\$239,528,483	6.0%	5.90%
2017	\$254,942,009	6.0%	6.43%
2018	\$276,847,383	6.0%	8.59%
2019	\$283,998,382	6.0%	2.58%
2020	\$167,386,000	6.0%	-41.06%
2021	\$176,872,100	6.0%	5.66%
2022	\$336,319,200	6.0%	90.14%
2023	\$359,324,500	6.0%	6.84%

Source: made by the author based on Orange County FL, Comptrollers' Office.
https://occompt.com/download/Comprehensive-Annual-Financial-Reports-Expanded-Version/CAFR_Expanded_2019.pdf

(Figure9) Trends in lodging tax revenue over the past 10 years in Orlando, Florida (Orange County)

How much revenue growth would be necessary to offset the increase in operating expenses caused by a 50% rise in labor costs? To answer this, let's conduct a simulation using simplified figures based on the framework of the Uniform System of Accounts for the Lodging Industry. Figure 10 presents three income statements side by side. The one on the far left represents the current situation. The middle statement projects net profit if labor costs are increased by 50% while keeping current revenue levels unchanged. In this scenario, the net profit turns into a deficit. However, as seen in the simulation on the far right, a mere 20% increase in revenue is sufficient to fully absorb the 50% rise in labor costs, while also achieving a modest increase in net profit. (Figure 10)

(Figure 10) Hotel management – Calculation table: current situation vs. 50% increase in labor costs vs. 20% revenue increase & 50% labor cost increase

Current	Near Future 1	Near Future 2
Gross Revenue	Gross Revenue	Gross Revenue
100	100	120
Operating Expenses	Operating Expenses	Operating Expenses
60	77	77
Labor Costs	Labor Costs	Labor Costs
35	52	52
Other Fixed Costs	Other Fixed Costs	Other Fixed Costs
25	25	25
Net Income	Net Income	Net Income
15	-2	18
	Labor Cost : 50% Increase Sales : No Change Operating Rate : No Change	Labor Cost : 50% Increase Sales : 20% Increase Operating Rate : No Change

With this understanding, comparing the financial statements of the accommodation industry in the three major metropolitan areas for 2022 and 2023, or alternatively, comparing the monthly profit and loss statements for the same month in 2023 and 2024, would help determine the revenue growth rate. This analysis would clarify whether the 20% revenue increase necessary to accommodate a 50% rise in labor costs has already occurred.

It can be observed that, even in Japan, a significant number of accommodation facilities, particularly in the three major metropolitan areas, have achieved a revenue increase of approximately 20%. In the future, by strengthening DMOs outside the three major metropolitan areas and focusing on attracting inbound tourists to regional areas for overnight stays, the accommodation industry across Japan should aim for a 20% increase in revenue. When this goal is achieved, all additional revenue should be used to absorb the 50% increase in labor costs. This approach will allow the industry to transform the current challenging employment conditions on its own and should be considered a forward-looking investment that will help secure talent in the medium and long term. In the U.S. example, those who secured the resources for their reforms through increased revenue from higher retail prices—without relying on government support or subsidies—were the ones who succeeded in driving their own transformation.

3. Secondary effects of rapid hourly wage increases

With the hourly wage of non-regular employees increasing from \$10 to \$16, their annual income rose from \$20,000 (approximately 3 million yen) to \$32,000 (approximately 4.8

million yen), assuming a 40-hour workweek and two weeks of vacation per year, before taxes. This growth led to a situation known as salary compression, where the income gap between non-regular and regular employees became misaligned. As a result, HR departments addressed this by adjusting salaries, leading to a 30–40% increase in the annual income of regular employees. A prime example of the aforementioned salary compression adjustment is the starting annual salary for recent graduates from our faculty, which rose by 40%, from \$38,000 (approximately 5.7 million yen) before the pandemic to \$51,000 (approximately 7.65 million yen). As a result, the hotel industry now offers salary levels that enable employees to establish both a clear career path and life planning. This has attracted job seekers, including those with no prior experience and those transitioning from other industries. Consequently, the industry's image of "long hours and low wages" has rapidly diminished. It is worth noting that the treatment of managerial positions and executive candidates has improved significantly compared to previous levels.

This is precisely the area that Japan's tourism and accommodation industries should focus on for structural reform to ensure long-term sustainability. In the United States, when the balance of market supply and demand was disrupted after the pandemic, the private sector leveraged market principles to drive its own improvements, achieving these results independently.

In other words, if Japan can similarly leverage the period of increased tourism demand to significantly improve employee conditions within a short timeframe, it can achieve the same results as seen in the United States. In Japan's case, instead of relying on the large but stagnant domestic travel demand, the industry can use the rapidly expanding inbound tourism market as a catalyst. This segment is expected to grow at an annual rate exceeding 30%, driving significant expansion toward 2030.

4. Contributing to the Resolution of Social Issues Through the Expansion of Mission in Tourism Industry Strategy Formulation

A strategic plan for improving working conditions within the tourism industry sector has been outlined, drawing on the U.S. case as a model and justification, along with a clear indication of the financial resources for self-driven transformation. Finally, it is worth emphasizing that the successful implementation of structural improvements in the treatment of accommodation industry workers can have secondary effects that extend beyond the industry itself, positively impacting local socio-economic systems.

"Reasons Why the U.S. Recession Predicted by Economists in 2023 Did Not Occur"

At the beginning of 2023, many economists and financial publications predicted that the U.S. economy would fall into a recession due to the exhaustion of "revenge spending." *The Wall Street Journal* was among those making this projection. However, the anticipated recession did not occur. On August 10, 2023, *The Wall Street Journal* published an article titled "Women Own This Summer. The Economy Proves It.," offering an apology for its inaccurate prediction and providing an analysis of the reasons behind this unexpected outcome. In 2023, the average annual income of female wage earners in the United States exceeded \$50,000 (approximately 7.5 million yen) for the first time in history. According to *The Wall Street Journal*, "When male wage earners in the past had surplus funds, their spending patterns often involved investments in fixed assets, such as purchasing investment properties or luxury European cars. These expenditures resulted in significant capital outflows to overseas regions, particularly Europe, and often came with corresponding fixed liabilities. However, as women's disposable incomes increased, their spending patterns diverged from the traditional male-centric consumption trends. Rather than investing in fixed assets, women focused on experiential consumption. For instance, purchasing tickets to a Taylor Swift concert often entailed additional spending on once-in-a-lifetime experiences such as custom-made dresses, hair salon appointments, pedicures and manicures, and custom bracelets. These types of experiential spending stimulated labor-intensive small businesses within local economies, leading to a more localized economic circulation of goods and services. As a result, local economies were bolstered by women's consumption, preventing the recession that economists had predicted." *The Wall Street Journal* highlighted in its article that economists had underestimated the economic impact of increased female incomes on regional economies, which ultimately played a key role in averting an economic downturn.

In other words, improving the working conditions of accommodation industry employees—an industry where women account for two-thirds of the workforce but face some of the lowest treatment levels among industrial sectors in Japan—could achieve the following:

- Increase in disposable income for women living in regional areas, leading to greater personal consumption on experiential spending, which has high final demand for labor-intensive industries. This, in turn, would boost regional economies.
- Creation of high-paying jobs in regional areas, comparable to those in the three major metropolitan areas, which could retain talent from regional areas who would otherwise move to metropolitan areas for better employment opportunities.

To achieve these goals, it is essential to offer higher compensation for specialized skills that are indispensable and valuable for accommodating inbound tourism. For instance,

providing monthly allowances of 50,000 yen for holders of English Proficiency Test Level 2 and 100,000 yen for Level 1 holders would result in significantly improved compensation. A new employee with an annual starting salary of 2 million yen could earn 2.6 million yen with Level 2 certification or 3.2 million yen with Level 1 certification. Such compensation levels would make it possible to offer competitive pay even in regional economies, helping to prevent the outflow of talent to the three major metropolitan areas. Additionally, a system of allowances for specialized skills can clearly demonstrate to regional talent what they need to learn during their middle and high school years to secure high-paying local employment. This clarity would be instrumental in fostering a greater number of tourism professionals capable of supporting inbound tourism in the future.

Moreover, the education infrastructure for continuing knowledge and skill development among regional employees should move away from the traditional in-person approach and adopt online courses. These courses should include proper proficiency assessments (examinations) to ensure learning outcomes, thereby eliminating disparities in educational opportunities based on place of residence. For individuals who invest in themselves through reskilling, the system should offer accelerated promotion opportunities from employee to managerial positions, contributing to earlier improvements in compensation and career advancement.

Furthermore, when an industry sector with the lowest compensation among 14 sectors undergoes structural improvements in working conditions, it creates secondary structural changes. Specifically, as labor flows into the improving sector from other low-income sectors—in Japan's case, wholesale and retail, and service industries—wage pressure increases across these sectors as a whole. This phenomenon, observed in the United States, highlights the broader impact of wage improvements in a single sector.

An increase in retail prices, when the number of employees remains unchanged, directly translates into improved labor productivity. Furthermore, as the recovery and rapid growth of inbound demand, which began in the three major metropolitan areas, continue to expand into regional areas, the demand for individuals with English and other foreign language skills will increase significantly. Introducing a robust allowance system for such specialized skills, which have often been overlooked, can provide a clear incentive for young people in regional areas (middle and high school students) to learn these languages as tools. This would highlight the pathway to securing better-paying local employment, motivating them to invest in their language education. In the future, as globally competitive DMOs are established across various regions, implementing a fixed-rate lodging tax to secure regional special-purpose tax revenue exclusively for tourism promotion would enable these DMOs to provide compensation packages that exceed those in the three major metropolitan areas. This would ensure world-class treatment for DMO executives and staff, positioning them as exemplary employers and stars of regional employment. Achieving this level of reform

would allow the tourism industry to shed its image of long hours and low wages. Furthermore, it could reposition itself as a high-performing export industry, capable of earning foreign revenue on par with metropolitan areas, even within regional economies.

Over the next six years, it is crucial for the private accommodation industry to take the lead in implementing strategic plans and achieving the envisioned ideal state. This discussion has provided an example of how this can be accomplished.



Tadayuki Hara

Associate Professor

Rosen College of Hospitality Management

University of Central Florida

Visiting Professor

Kyushu Sangyo University

UNESCO CSA, Technical Advisory Committee Member of
ICAOASA

Graduated from the Faculty of Law at Sophia University. After working at the Industrial Bank of Japan and the Ministry of Foreign Affairs, he earned a Ph.D. from Cornell University's School of Hotel Administration. He also holds three master's degrees in hotel management, business administration, and regional science. His expertise lies in the economic impact of the tourism industry and hospitality management. He teaches courses in finance, applied statistics, economic impact analysis, and international event management. Additionally, he delivers intensive lectures annually at several universities in Japan, including the University of the Ryukyus, Hitotsubashi University, Kyoto University, and Waseda University. A pioneer in tourism studies through Massive Open Online Courses (MOOCs), he currently resides in Florida, USA.

Column #1: Towards the Establishment of a Planning Theory Through 'Strategically Implemented Tactics

Masahiro Kanno

In tourism-oriented regional development, strategy is often deemed essential. The process of envisioning a desired future or vision for the region, deriving pathways to achieve it through backcasting, and fostering a shared understanding among stakeholders can be considered an ideal approach. Consequently, "strategy" is recognized as one of the key elements in the field of tourism studies, particularly within the scope of "destination management." Furthermore, it is a frequently discussed concept from the perspective of "destination governance," which addresses decision-making and consensus-building.

In fact, supporting the formulation of such strategies for tourism destinations has become one of the core domains of our foundation's activities. Particularly in the current context, as the COVID-19 pandemic subsides and tourism, including inbound travel, experiences a robust recovery exceeding pre-pandemic levels, there seems to be a noticeable increase in opportunities for such strategic engagements once again.

However, given the rapidly changing environment surrounding tourism destinations in recent years and the increasing difficulty in forecasting future developments, it is equally true that these strategies must be approached with flexibility and periodically reassessed to adapt to evolving circumstances. In particular, regional strategies like those mentioned above are often formulated as administrative plans. While such plans typically include a defined planning period and are generally reviewed every few years, their ability to adapt flexibly to environmental changes occurring at an even faster pace remains limited.

For instance, as mentioned by Nakajima in Feature 3, the concept of "Tactical Urbanism" has been gaining attention, particularly in the United States, since the 2010s in the field of urban planning. The term can be directly translated as "tactical urban planning." This concept is defined as "an approach to community building that uses short-term, low-cost, and scalable projects to *intentionally* serve as catalysts for long-term change." Specifically, it refers to initiatives that intervene in urban spaces not through costly, long-term projects but rather through temporary structures or installations. These interventions allow for the flexible renewal of spaces and aim to enhance the experiential value for users, including residents, businesses, and visitors utilizing the urban environment.

What is crucial here is that, while it is described as a tactical approach, it is emphasized that it is "not merely a one-off guerrilla activity, but rather a means to realize strategic plans." This indicates that strategy is not rendered unnecessary; rather, it remains an integral component of the approach. An example of an initiative that applies the principles of Tactical Urbanism is the project centered on the formulation of the "Float Vision" in

Hachioji City. This initiative is a series of efforts aimed at enhancing the appeal of the city center through urban development in collaboration with landscape administration. It involves consolidating discussions from citizen workshops and expert panels on envisioned future landscapes and activities into a booklet—a landscape picture book titled *Hachioji Machinaka Keikan Mirai Monogatari (Hachioji Cityscape Future Story)*. Actions based on this vision have been implemented as part of the project. ("Float Vision" refers to a planning approach deliberately designed to "detach" the envisioned future from existing municipal plans. This method aims to present the area's value and potential as a concrete and proactive vision of its future.)

Now, turning our focus back to tourism destinations, it becomes evident that, much like urban environments, they involve a diverse range of stakeholders and are inherently characterized by constant uncertainty.

If that is the case, then in destination management as well, it may be necessary to adopt an approach of "strategically implementing tactics"—sharing an overarching long-term strategy while taking practical measures at the tactical level in the short term. While "strategy" and "tactics" are often used as opposing concepts, this approach may seem paradoxical. However, it can be regarded as one of the essential perspectives required in an era marked by uncertainty and unpredictability.

An example of this is the *Tourism Master Plan* and the *Tourism Promotion Plan* formulated in Kutchan Town in fiscal year 2019. The *Master Plan* was developed through collaboration between the local government and tourism-related organizations, such as the DMO, to share a concrete vision of the desired future for the destination and establish approaches for the tourism industry to achieve that vision. On the other hand, the *Tourism Promotion Plan* outlines the fundamental principles and policies for tourism promotion in Kutchan Town, as well as the initiatives undertaken by the local government to support the tourism-related industries. While the *Master Plan* includes strategic elements, it is characterized more strongly as a detailed collection of tactics. The *Tourism Promotion Plan*, on the other hand, is intended to function as a regional strategy that encompasses and integrates these tactical elements.

Future tourism research should draw insights from practical examples like those mentioned above and focus on developing methodologies to establish "strategically implemented tactics" as a functional planning theory.

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Masahiro Kanno

Senior Researcher

Regional Management Specialist

Tourism Research Department

Japan Travel Bureau Foundation

Column #2: The Role of Tourism Research in an Era of Uncertainty: Perspectives from the "Islands"

Yutaka Nakajima

In 2022, the Japan Travel and Tourism Foundation, a public interest incorporated foundation, established its Okinawa Office (nicknamed the Okinawa Sustainable Lab), marking its first regional branch office outside its main headquarters in Tokyo's Aoyama district. Since its establishment two years ago, the Sustainable Lab has been actively engaged in initiatives centered around the theme of sustainable tourism. Its activities aim to: support the recovery and sustainable development of tourism in Okinawa, conduct research and field studies on the practical implementation of sustainable tourism, and create a platform for connecting individuals and sharing knowledge dedicated to the practice of sustainable tourism.

One of the Sustainable Lab's primary goals is to develop numerous practical initiatives based on theories grounded in the accumulation of objective knowledge. To identify opportunities for practical activities, the team has engaged in extensive dialogue with practitioners, not only within Okinawa Prefecture but also across various islands in the Ryukyu Archipelago, including those in Kagoshima Prefecture.

Islands often face various challenges, both in daily living and in conducting business, such as limited access to shopping, emergency and medical services, child-rearing support, and the constraints of a small market area. These challenges are increasingly becoming commonplace disadvantages in modern times. Many young people leave islands due to a lack of job opportunities, and numerous islands now struggle to sustain themselves without government subsidies or public works projects.

The practitioners I have met, despite facing such harsh conditions, have supported their livelihoods through initiatives such as renovating traditional houses or developing and selling local specialty products. In doing so, they have fostered exchange populations, driven the local economy, and contributed to the sustainability of the islands themselves. For some, these efforts represent a way to restore the nostalgic landscapes of their ancestral hometowns, while for others, they may symbolize the creation of a new vision of



Statue of the Iriomote Cat
- Taketomi Town, Okinawa Prefecture

home for future generations. While each process can be framed as a beautiful story, in reality, very few cases involve a linear approach toward a clear vision or goal. Instead, these efforts unfold in a world devoid of "certainty," marked by small failures, significant setbacks, and even isolation within the community due to the novelty of their initiatives. However, those who have achieved something share common traits: remarkable flexibility and resilience, coupled with a strong focus on a "certain" and "concrete" future, even amidst an uncertain world. On the other hand, I continually ask myself what I, as a researcher, can contribute. To change people's mindsets and reshape the landscape of the future, those capable of taking action must first act, concretizing future possibilities in real-world settings. Then, the outcomes must be evaluated, refined, and iterated upon. If such efforts to build a network of allies and understanding lead to a broader societal consensus for a different future, and if the accumulation of actions and tangible outcomes gradually shapes that future, then it is through these small, incremental steps that a new reality can emerge.

The challenges faced on the islands are currently more visible due to their unique context, but structurally, they are likely to become issues that regional areas across Japan will face in the future. By addressing the challenges on the islands, I hope to uncover pathways to navigate the phenomena that Japan's tourism industry as a whole will inevitably need to confront in the future. In this context, as a researcher, I aspire to become a community doctor—someone who stands alongside and supports the individuals rooted in their local regions. As a researcher, my role may involve acquiring and compiling diverse knowledge from both domestic and international sources, rigorously validating it through scientific methods, and connecting it to generalized theories. However, I aim to go beyond mere generalization by focusing on practical applications in local contexts—adapting these generalized insights into specific solutions tailored to the unique needs of each region. As a researcher, I aim to confront regional challenges alongside practitioners, embracing the same risks within an uncertain world. This approach represents what I hope to pursue through the Sustainable Lab and reflects one of the key reasons why our foundation has established an office outside Tokyo. In an era of uncertainty, I aspire to shape engaging futures and vibrant communities as a researcher actively involved in practice.

Yutaka Nakajima

Director of JTBF Okinawa Lab. for Sustainability
Senior Researcher, Environmental Planning Specialist
Tourism Research Department
Japan Travel Bureau Foundation

Column #3: Market Research Required in an Unstable, Uncertain, Complex, and Ambiguous World

Reiko Gokita

In an Unstable, Uncertain, Complex, and Ambiguous World (VUCA World), it is not difficult to imagine that predicting, anticipating, and responding to traveler trends becomes increasingly challenging. The sudden outbreak of the COVID-19 pandemic in 2020 can be described as a quintessential example of a VUCA world. In this world, travel, deemed non-essential, was rapidly curtailed, leading to a sharp decline in the number of tourists worldwide. Subsequently, the pandemic significantly destabilized the demand in the travel market, as evidenced by the resumption of travel under restrictions, the resurgence of travel through so-called "revenge travel," and a loss of interest in travel altogether among certain segments of the population. Just as we must anticipate and prepare for disasters that are unpredictable in terms of timing and location but are certain to occur somewhere at some point, the necessity of conducting market research to predict and anticipate traveler trends in the tourism sector remains unchanged. In fact, it can be said that this need is growing even stronger.

What do people seek in situations like the COVID-19 pandemic? During the COVID-19 pandemic, it is likely that people sought decision-making criteria more than ever before. For many years, our foundation has provided society with medium- to long-term statistical data on the overall picture and realities of the travel market through the "JTBF Travel Sentiment Survey" and the "JTBF Travel Behavior Survey." During the COVID-19 pandemic, we expanded these surveys to better understand the pandemic's impact on the travel market and sequentially released the analysis results to the public.

(<https://www.jtb.or.jp/research/statistics-tourist/>)

During the COVID-19 pandemic, the pageviews for the relevant sections on our foundation's website ranked among the highest, quickly becoming highly sought-after content. What drove people to access these survey results? It can only be speculated, but in a situation where traditional market trends were no longer observable, people likely wanted to understand what was happening. They seemed driven by a desire to make informed decisions based on concrete data rather than relying solely on intuition. What thoughts consumers contemplated, how they acted, and what they felt—these questions became particularly evident during the COVID-19 pandemic, as even non-experts sought information about travel market trends. In a VUCA world, market research and its dissemination are expected to play an increasingly crucial role.

In addressing volatility and uncertainty, the aspect of immediacy is becoming increasingly important. When a term is too long, it may fail to capture changes accurately,

potentially overlooking critical signals. To respond to the rapid shifts in tourism trends and consumer behavior, it is now more essential than ever to collect data in real time, analyze it immediately, and increase the frequency of data updates. Furthermore, from the perspective of complexity and ambiguity, it will be necessary to conduct more multifaceted analyses of the travel market, where multiple factors are intricately intertwined. Advancements in technology have made it possible to analyze large volumes of complex data. Effectively leveraging AI and big data is essential for extracting valuable insights from vast datasets.

On the other hand, in a world where diverse individual values are increasingly emphasized, data that conceals the uniqueness of individuals cannot fully capture or represent the entire picture. In an era of diversity, it is crucial to respect individual voices and values, shifting the focus from mere majority rule to placing greater emphasis on the individual. Rather than offering the same service to all customers, it is essential to deliver optimal value tailored to each customer's attributes and behavioral history. Achieving this requires understanding each individual customer, which means utilizing personalized data analysis. Here, too, the effective use of technology is indispensable.

Philip Kotler, often referred to as the "Father of Modern Marketing," has proposed marketing concepts that define each era from the 1900s to the present day. From the 1900s to the 1960s, Kotler identified "Marketing 1.0," a product-oriented approach focused on selling goods at the lowest possible cost to maximize profits. In the 1970s and 1980s, "Marketing 2.0" emerged, emphasizing a consumer-oriented approach aimed at satisfying customer needs. The 1990s and 2000s introduced "Marketing 3.0," a value-driven approach that prioritized social values and sought to foster empathy with customers. By the 2010s, the digital era brought about "Marketing 4.0," which emphasized customer engagement and self-actualization. In the 2020s, "Marketing 5.0," which focuses on enhancing customer experience value through the use of technology, was introduced. One of its key strategies is agile marketing—a method that involves launching products on a limited scale, rapidly collecting, analyzing, and verifying consumer responses, and iterating to optimize outcomes. In December 2023, *Marketing 6.0* was published (English edition). The text features terms such as meta-marketing, metaverse, extended reality, and immersion, indicating the continued adaptation to evolving technologies. The evolution of marketing concepts in a VUCA world is rapid. As part of its role, we aim to adapt these global trends to the context of local tourism and actively work toward their implementation.

Reiko Gokita

Senior Researcher, Market Research Specialist

Tourism Research Department

Japan Travel Bureau Foundation

Perspective: Tourism Research to Navigate VUCA

Yuichi Yamada

Social Transformations that Emerged in the Late 1990s

I joined the Japan Travel Bureau Foundation in 1998. By that time, the bubble economy had already collapsed, yet the domestic travel market remained stagnant. Subsequently, the domestic travel market began to decline, leading to a series of bankruptcies among resort facilities and large inns that had been heavily invested in during the bubble era. This trend also exacerbated concerns over the stability of financial institutions. During the bubble era, "tourism" and "resorts" were spotlighted as tools for regional revitalization and shone brightly. However, in the aftermath, they were sometimes stigmatized as socially undesirable and even blamed as contributing factors to societal stagnation.

In the same year, South Korean President Kim Dae-jung proclaimed himself the "Cultural President" and personally appeared in tourism promotional commercials, declaring tourism and culture as central pillars of economic development. Today, the phenomenon of "Korean Wave" has become an international cultural force, and its origins can be traced back to this presidential declaration.

Around the same time, the United States, having recovered early from the economic downturn that began in the late 1970s, was shifting the core of its economy toward service industries such as IT and finance to align with its recovery trajectory. This shift also encompassed the hospitality industry, including hotels and restaurants. The management techniques in this sector improved dramatically during this period.

This development became a driving force behind the enhanced competitiveness of global hotel chains. In Japan, the enactment of the *Act on Securitization of Assets* (commonly known as the SPC Act) in 1998, followed by the *Act on Investment Trusts and Investment Corporations* in 2000, enabled the introduction of lodging businesses that separated ownership and management through so-called investment funds.

Furthermore, around 1995, the Open Skies policy gained momentum in Europe and the United States, leading to the emergence of carriers such as Southwest Airlines and Ryanair. In Japan, this shift was marked by the launch of Skymark Airlines and AIRDO in 1998, followed by Skynet Asia Airways (now Solaseed Air) in 2002, bringing dramatic changes in the mobility landscape.

This period also coincided with the release of Windows 95 (1995) and Windows 98 (1998), both of which came standard with internet connectivity features. At the time, communication lines were expensive, but the launch of the INS Net 64 service by the former Nippon Telegraph and Telephone Public Corporation in 1988, followed by the introduction of both FTTH (fiber-to-the-home) via optical fiber and ADSL services via metal lines for

households in 2001, marked the dawn of the internet era. The global spread of the internet led to a heightened awareness of environmental and human rights issues.

This period was also marked by the absence of an anticipated event: the third baby boom. Based on the age demographics of the second baby boomers, it was expected that the third baby boom would occur around the year 2000. However, it never materialized. Although Japan's total population did not begin to decline until the late 2000s, this trend had already been confirmed around the year 2000.

If there is such a thing as a turning point in history, the period around 2000 can undoubtedly be regarded as one.

The "changes" that emerged during this time gradually transformed society in various ways over the following quarter-century.

The Dawn of the VUCA Era

VUCA, originally a military term representing Volatility, Uncertainty, Complexity, and Ambiguity, began to be adopted as a business term in the 2010s. This reflects the ripple effects of paradigm "shifts" in the socio-economic landscape, where society underwent rapid transformations. As a result, future projections and decision-making could no longer rely on traditional extensions of the past but required a zero-based approach.

The same applies to the field of tourism.

For example, until around 2000, the aviation industry was regulated by IATA. However, the liberalization brought about by the Open Skies policy drastically transformed the competitive landscape. Prior to that, relationships with governments were crucial. However, following liberalization, the key management challenges shifted to gaining customer support and securing sufficient traffic volume. This not only brought significant changes to pricing strategies but also shifted the distribution of airline tickets from agency-based sales to direct sales. Furthermore, the rise of low-cost carriers (LCCs) led to an increase in point-to-point direct flights, moving away from the traditional hub-and-spoke route model. For regional areas, securing direct connections to urban centers became a critical priority. Additionally, the emergence of investment funds through real estate securitization and the rise of operators specializing in hospitality operations transformed the lodging industry from a regionally dependent business into one capable of horizontal expansion. As a result, the competitive edge increasingly came to be defined by the managerial capabilities of individual companies. This shift led to significant investment in popular tourist destinations, resulting in a rapid supply of a large number of beds within a short period. At the same time, the traditional notion that "lodging operators are local businesses" was dismantled. Accommodation costs, being one of the most significant

components of tourism expenses, were traditionally seen as having substantial economic ripple effects on local communities through employment and the procurement of raw materials by lodging facilities. However, as ownership and operations increasingly shifted to external capital, this dynamic also began to change.

Furthermore, the advent of the social media era, driven by the widespread adoption of the internet, significantly transformed the distribution of travel products. The influence of traditional travel agencies, which relied on physical stores and brochures to sell travel products, declined. Instead, individuals began connecting directly with service providers or through online travel agencies (OTAs) via the internet. As a result, regions and businesses also needed to establish direct connections with customers on an individual basis.

This shift was driven by the growing gap between experienced travelers and those with less travel experience, leading to increased diversification in tourism. As a result, a wide range of tourism experiences began to be demanded. Moreover, the increase in international travel flows led to a surge in inbound tourists to Japan, necessitating accommodations for people with diverse cultures and customs. Additionally, issues such as LGBTQ rights, environmental concerns, and other human rights and global challenges became increasingly intertwined with tourism.

Overall, what had previously been managed within a certain framework by governments and organizations in a largely predetermined manner began to shift toward a model driven by individual decisions and actions. This transition has led to increasing diversification across various facets of society. Moreover, these diversified branches continuously undergo further fragmentation and transformation. This ongoing evolution triggers a domino effect, causing interconnected changes across various social phenomena.

As a result, conventional wisdom from just a short time ago, along with the legal systems and administrative policies based on it, can no longer adequately address current challenges.

For example, Kutchan Town in Hokkaido is known as a region with active foreign real estate investment. At the same time, it is often associated with terms like overdevelopment and bubble-like phenomena. It is true that real estate development driven by investment is currently resulting in urban sprawl. However, the reasons for the inability to control this phenomenon are also clear: nearly all the areas attracting investment are classified as quasi-urban areas, where urban planning methods such as regulation and guidance are largely inapplicable. The Urban Planning Act, established to ensure the sound development of cities, has undergone various improvements to align with urban realities. Nevertheless, its scope remains strictly limited to "urban areas," excluding resorts from its purview. In Kutchan Town, for instance, while the area around the train station is designated as an urban planning zone, resort areas such as Hirafu are still classified as quasi-urban areas. As a result, investments exceeding a certain scale are classified as development activities,

which bypass Kutchan Town's jurisdiction and defer decision-making to the Hokkaido government. However, unless there are clear legal violations, such developments are generally approved.

This structure highlights how current laws and regulations fail to anticipate significant investments in non-urban areas, leading to their pseudo-urbanization—something neither the existing legal framework nor local governments had foreseen.

The binary distinction between urban and rural areas is, at its core, a concept and common understanding that emerged after the Industrial Revolution. In the agrarian society prior to the Industrial Revolution, cities served as political and economic centers, primarily inhabited by the ruling classes. However, the majority of people lived in rural areas, as they had no freedom to choose their place of residence or occupation. Consequently, there was no significant population influx into urban areas. With the Industrial Revolution came movements toward democratization, such as the bourgeois revolutions, which granted people the freedom to choose their residence and occupation. At the same time, the concentration of factories and industries in urban areas accelerated, leading to significant population influxes into cities. However, the advent of the information revolution brought about by the internet signals the arrival of an era where the locations of work or study no longer need to coincide with one's place of residence.

Relationships Between the Special Features

In Special Feature 1, Mr. Kumagai points out the increasing migration of young people to Akita Prefecture and the growing number of inbound tourists, identifying the sustainable integration of this demand as a critical challenge for regional areas. In Special Feature 3, Mr. Nakajima uses Fuji-Yoshida City, a small to medium-sized regional city with strong tourism elements, as a case study to advocate for community development that is "small, flexible, and decentralized." Meanwhile, in Special Feature 4, Mr. Umekawa examines the concept of "resorts," tracing its evolution and proposing the creation of spaces for extended stays that are neither urban nor rural. Each of these perspectives illustrates how the definition of "cities" is shifting when viewed through the lens of "people" as the central focus. They also highlight the potential for "tourism" to support or mediate this transformation in definition.

The connection between regions and communities facilitated through "people" is addressed by Mr. Nishiyama in Special Feature 2. Mr. Nishiyama examines the evolving relationship between tourism and regions, emphasizing the need for tourism to further enhance its public value. He also advocates for the deepening of destination management practices to align with this increased focus on the public good. The "people" who drive demand, the business models of service providers, and the circumstances surrounding

regions have all undergone significant changes and will continue to evolve. Naturally, destination management must also adapt and evolve in response to these ongoing transformations.

Addressing the importance of scientifically analyzing these changes and organizing their causal relationships to strengthen destination management and marketing is the focus of Mr. Moriguchi in Special Feature 7. Mr. Moriguchi emphasizes that, even for phenomena that elicit different responses from individuals, conducting thorough examinations is crucial for implementing effective and efficient measures, which he identifies as an important challenge not only for tourism but for society as a whole. Efforts to scientifically understand and leverage the increasingly diverse and complex behaviors of people in business applications are expanding into academic fields such as service management and hospitality management. In Japan as well, there is a growing need to accumulate and apply academic insights in these areas.

Addressing the remaining key elements of destination management—environment and culture—are Mr. Aiko in Special Feature 5 and Mr. Yamamoto in Special Feature 6. Mr. Yamamoto highlights how human activities and interactions with spaces shape landscapes, which in turn contribute to the formation of social and cultural identities. Similarly, in Special Feature 5, Mr. Aiko focuses on the relationship between natural environments, including those impacted by climate change (global warming), and tourism as an object of study. He advocates for deepening research by combining these environmental concerns with the socially significant field of tourism.

Tourism Research in the VUCA Era

Let us revisit the concept of VUCA: Volatility, Uncertainty, Complexity, and Ambiguity.

As discussed so far, the advent of the information society has continuously transformed human behavior, as well as the responses of businesses and regions to these changes (Volatility). These changes are not uniform shifts at a mass level but are instead shaped by individuals' unique values, economic capacities, and experiences, even as they navigate the mixed quality of information on social media. This makes predicting or guiding these changes highly challenging (Uncertainty). Furthermore, these changes influence surrounding individuals, businesses, regions, and other stakeholders, leading to various synergistic effects and interconnected outcomes (Complexity). As a result, phenomena with unclear causal relationships, previously unseen in society, can emerge unexpectedly, almost like sudden mutations (Ambiguity).

For example, in tourism, there has been a shift from mass tourism to FIT (Free Independent Travelers) (Volatility). To adapt to this change, regions and businesses have

introduced various forms of "adjective tourism" (e.g., adventure tourism, wellness tourism), yet they have not always succeeded in capturing the anticipated demand (Uncertainty). Furthermore, as tourism deepens its relationship with local communities, new ventures such as private lodging businesses and agricultural enterprises involved in sixth-sector industrialization have emerged. At the same time, the integration of tourists into everyday living spaces has led to friction with residents. These developments have resulted in a growing number of stakeholders (Complexity). As a result, despite the shift toward individualized travel (FIT), issues such as overtourism—where large numbers of people concentrate in specific areas or during specific times—have emerged. Additionally, while tourism expenditure statistics show an increase, visible economic benefits remain elusive, leading to further challenges (Ambiguity).

One approach to addressing such diverse and complex issues is known as the "systems approach." It is an analytical method that considers not just individual parts but the whole, focusing on elements as well as their connections and relationships. This approach has also been utilized in tourism planning and research. However, as the elements involved in tourism have increased exponentially and the degree of change has intensified, it has become increasingly challenging to define the relationships between elements and stakeholders. There is a growing need to map out a new comprehensive framework for tourism, which has evolved into a "system" of a different dimension.

Conclusion

In the prefatory note, Mr. Ieda discusses "the allure of the unknown and uncertainty." From the perspective of planning to solve problems or achieve goals, VUCA is undoubtedly a challenging concept. However, when considering the essence and potential of tourism, it can be argued that its very uncertainty allows for the exploration of a wide range of future possibilities.

The higher the wall, the taller the mountain, the greater the difficulty—but so too is the profound emotion and sense of fulfillment upon overcoming it.

As a foundation, we aim to take on challenging issues while enjoying the journey.

Yuichi Yamada

Executive Director

Director of Tourism Research Dept.

Director, Library of Tourism Culture

Japan Travel Bureau Foundation