

# White Paper on Tourism in Japan, 2009

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## The Status of Tourism in Fiscal 2008

### Part 1 New Developments in Tourism Policy

#### Chapter 1 International Affairs Surrounding Tourism and the Promotion of Tourism Policy under the Government of Japan's Initiative

##### **Section 1 Establishment of the Japan Tourism Agency**

The "Tourism Nation Promotion Act" was established in December 2006, with the "Tourism Nation Promotion Plan" later being adopted at a Cabinet meeting in June 2007. "Realizing a tourism nation" is thus regarded as an indispensable national challenge to be addressed in order to develop the Japanese economy in the 21st century. Meeting the targets of the Tourism Nation Promotion Plan and making Japan a tourism nation under these circumstances require that the Government of Japan step up its collaboration and coordination with related ministries and agencies, and assume leadership in promoting measures toward realizing a tourism nation in a comprehensive and systematic manner.



Unveiling ceremony hosted by Mr. Hompo, first commissioner of the Japan Tourism Agency (left) and Mr. Kaneko, Minister of Land, Infrastructure and Tourism and minister in charge of Tourism Nation Promotion (right)

Then, in order to arrange a system that enables a functional and effective implementation of affairs, and designate the organs responsible for tourism administration, the "Japan Tourism Agency" was established on October 1, 2008, as an external organ for the Ministry of Land, Infrastructure, Transport and Tourism.

The Japan Tourism Agency (hereinafter "the Agency") states its intention to promote an exchange of international tourism in a bidirectional manner for foreign travelers visiting Japan and Japanese travelers overseas, attract and promote international conferences, and work to promote the arrangement of tourism zones for stay-oriented tourism including lodging facilities, in order to make Japan a tourism nation.

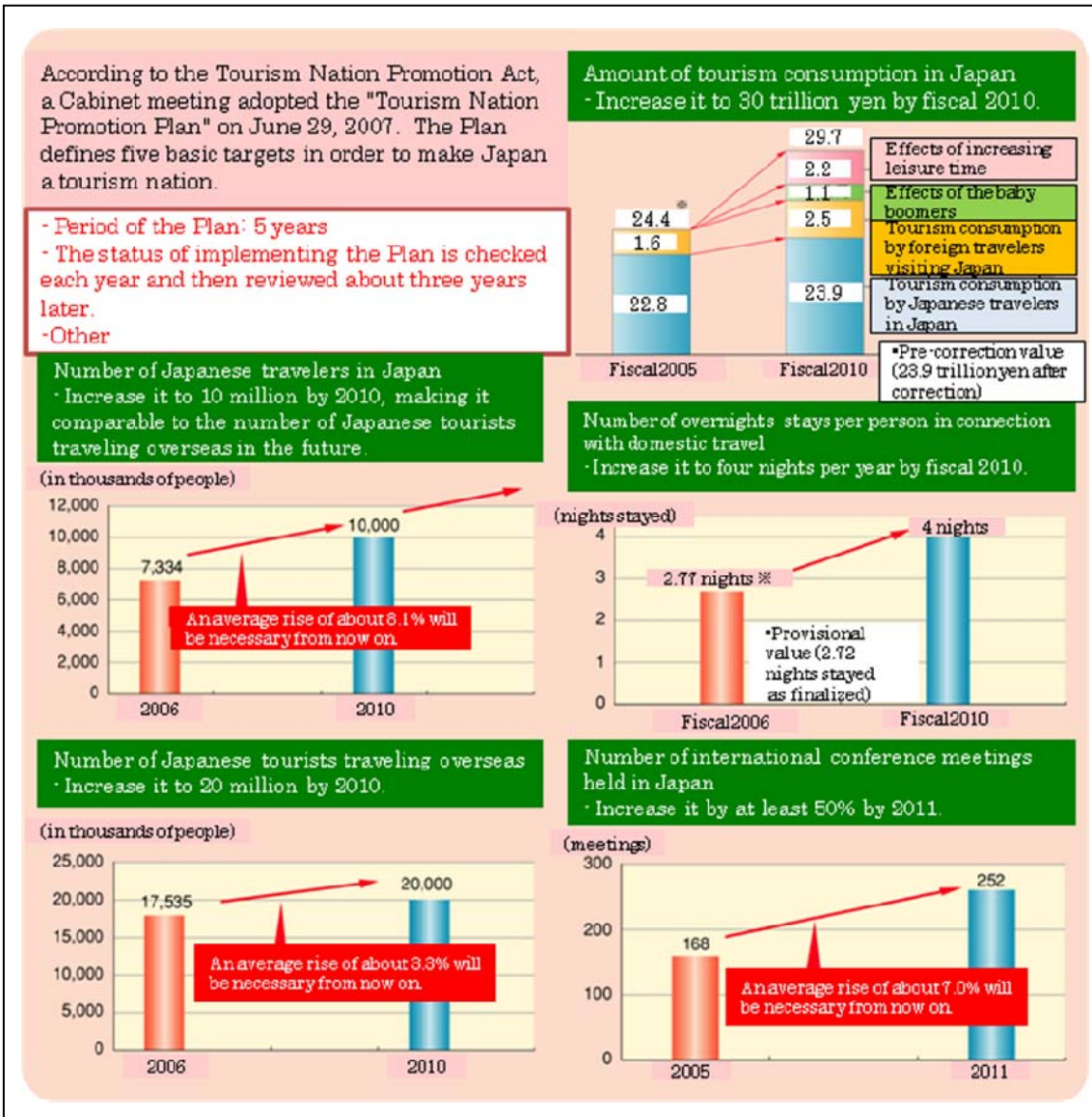
Moreover, the Agency has also compiled a "Japan Tourism Agency Action Plan" that prescribes the tentative targets, specific measures, and scheduling in order to facilitate effective efforts toward realizing a tourism nation.

## **Section 2 Tourism Nation Promotion Plan and Its Promotion**

The "Tourism Nation Promotion Plan" (hereinafter "the Plan") presents its basic principles regarding measures related to realizing a tourism nation and its targets, including (1) increasing the number of foreign travelers visiting Japan to 10 million by 2010, (2) increasing the number of Japanese travelers overseas to 20 million by 2010, (3) increasing the value of tourism consumption in Japan to 30 trillion yen by fiscal 2010, (4) increasing the number of overnight stays per person in connection with domestic travel to four per year by fiscal 2010, and (5) increasing the number of international conference meetings held in Japan by at least 50% by 2011. The Agency subsequently defined the necessary measures and other details to achieve those targets.

The Agency also expresses its intention to take the measures to make Japan a tourism nation in a comprehensive and systematic manner, based on efforts of the Agency in cooperation with the entire Government of Japan working as one unit.

Five targets in the "Tourism Nation Promotion Plan" to make Japan a tourism nation



## Chapter 2 Important Challenges and Strategic Efforts toward Realizing a Tourism Nation

### Section 1 Trends in Domestic Overnight Trips by the Japanese Public

#### 1. Trends in Domestic Overnight Trips

In recent years, there have been fewer overnight trips with accommodations in Japan and fewer Japanese tourists traveling overseas. In order to fully reactivate local communities in our aging society that will have fewer children in the future, and to promote international mutual understanding and meet the expectations of other nations, it is important for Japan to increase the number of tourists through an

exchange of tourism.

To that end, the Agency will analyze the trends in domestic overnight trips and the factors affecting travel behavior, while validating the challenges toward promoting more domestic overnight trips by the Japanese public.

(1) Domestic Travel Today

1) Changes in Domestic Overnight Trips with Accommodations

A closer look at the changes in overnight trips with accommodations in Japan reveals a downward trend in both in the number of trips taken and the number of overnight stays per capita as measured against the peaks in 1991 (\*). For fiscal 2008, the number of domestic overnight trips with accommodations per capita is estimated at 1.55, and the number of nights stayed at 2.44. This shows a reduced level of about 60% compared to the target of increasing the number of overnight stays per person in connection with domestic travel by the Japanese public to four per year by fiscal 2010 as prescribed in the Tourism Nation Promotion Plan.

2) Analyzing the Number of Domestic Overnight Trips with Accommodations

Changes in the number of domestic overnight trips with accommodations and the number of nights stayed

(trips, nights stayed)



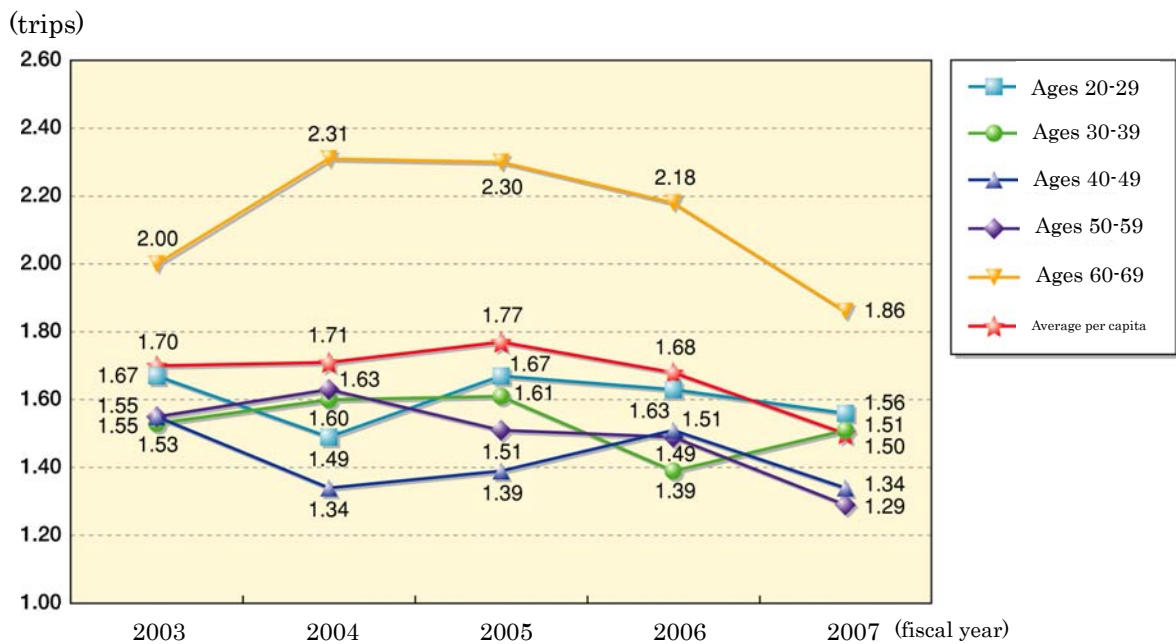
Notes:

1. Prepared by the Japan Tourism Agency.
2. A different survey method has been used since fiscal 2003. The new method uses the values taken from the "National Tourism Survey" as approved governmental statistics. Therefore, the statistics compiled based on the new method and those based on the old method are impossible to compare.
3. Provisional values are estimates of the annual amounts in fiscal 2008 based on tabulated results from the third quarter (April to December 2008).

A closer look at the changes in the number of domestic overnight trips with accommodations in fiscal 2003 to 2007 reveals that it reached 1.77 per capita in fiscal 2005 but declined to 1.50 in fiscal 2007.

Examining the characteristics of the number of domestic overnight trips with accommodations by age group reveals that it is generally lower than average for age groups from the 20s to the 50s. People in their 60s always topped the average, thereby leading the average frequency, but even this group showed a significant decline in fiscal 2007, thereby reducing the average.

Changes in the number of domestic overnight trips with accommodations per year (by age group)



[Note] Based on "National Tourism Survey" of the Japan Tourism Agency, Ministry of Land, Infrastructure, Transport and Tourism.

\* Domestic overnight trips with accommodations are mainly those intended for tourism and recreation in Japan, and do not include trips mainly intended for business, commuting to and from work, visiting friends, or trips mainly for such purposes that usually accompany tourism.

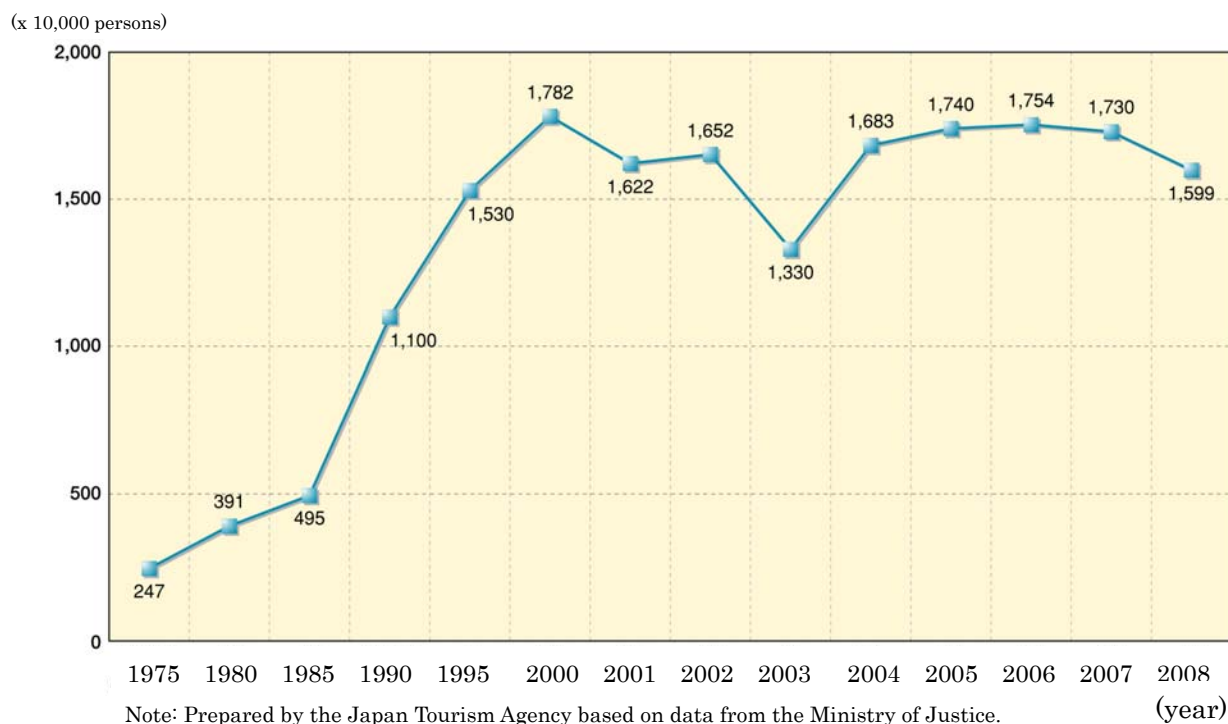


## (2) Overseas Travel Today

### 1) General Changes

The number of Japanese tourists traveling overseas in recent years reached about 17.82 million—a record high in 2000—and then significantly declined in the wake of the September 11 terrorist attacks in 2001, the outbreak of SARS in 2003, and other factors. The number of Japanese tourists traveling overseas in 2008 totaled about 15.99 million, remaining at about 80% of the target of reaching 20 million Japanese tourists traveling overseas as prescribed in the Tourism Nation Promotion Plan.

Changes in the number of Japanese tourists traveling overseas

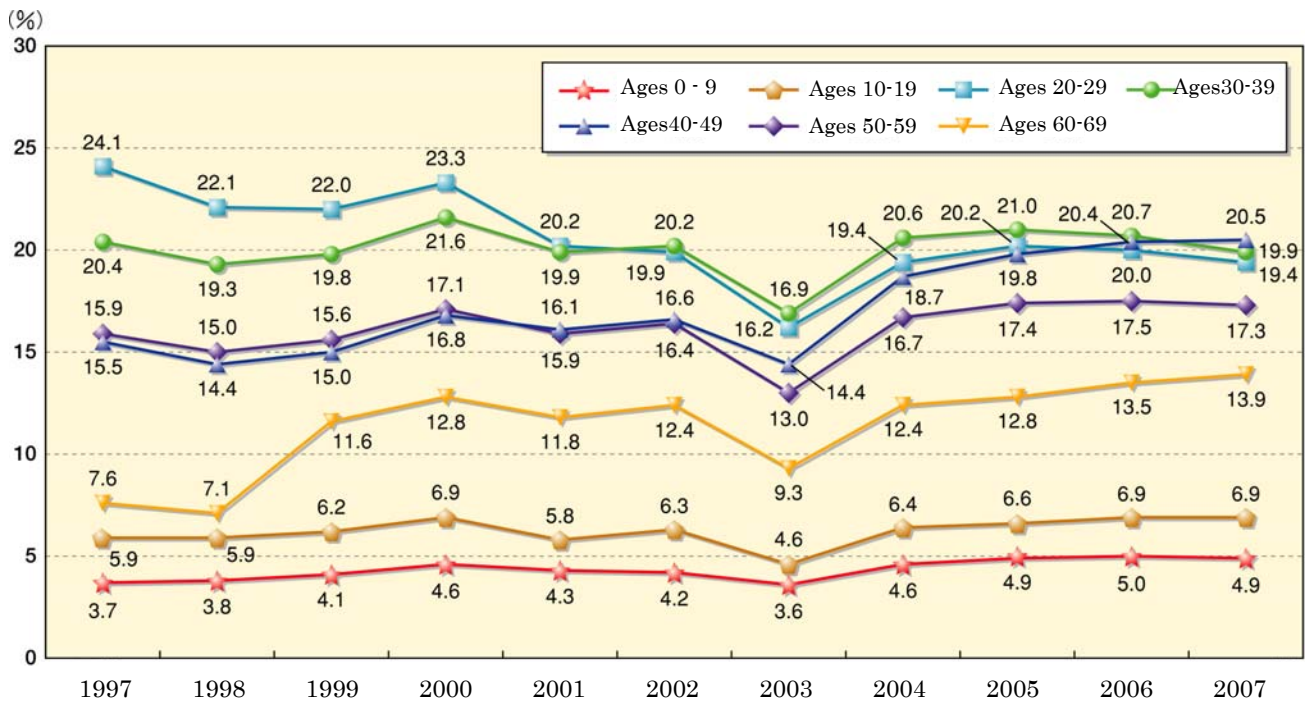


### 2) Analyzing the Percentage of Japanese Tourists Traveling Overseas

The percentage of Japanese tourists traveling overseas by age group was on an upward trend until 2000 for all age groups, and then significantly declined in the wake of the September 11 terrorist attacks, the outbreak of SARS, and other factors. It then began to rise in 2004, with the data on most age groups having recovered to 2000 levels, but the percentage of those in their 20s remains as low as about 85% of the 2000 level.

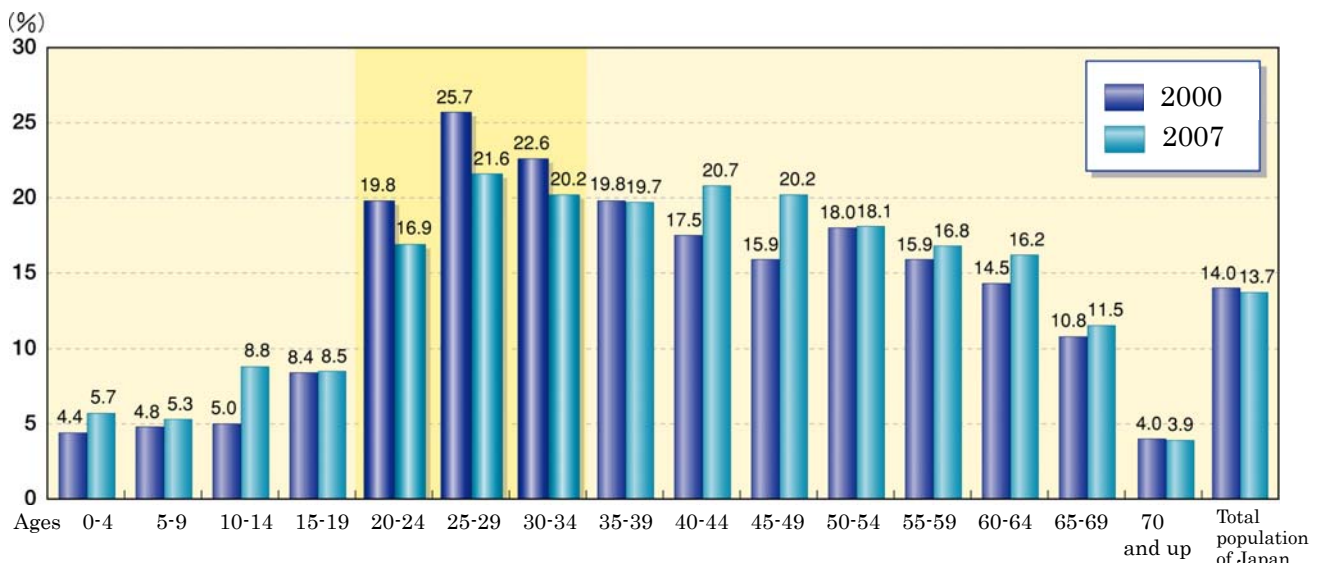
Moreover, examining the percentages of Japanese tourists traveling overseas in 2000 and 2007 by age group reveals great declines among those in their 20s to mid-30s. Looking at the percentages of those in their 20s shows a greater decline among women.

### Changes in the number of Japanese tourists traveling overseas



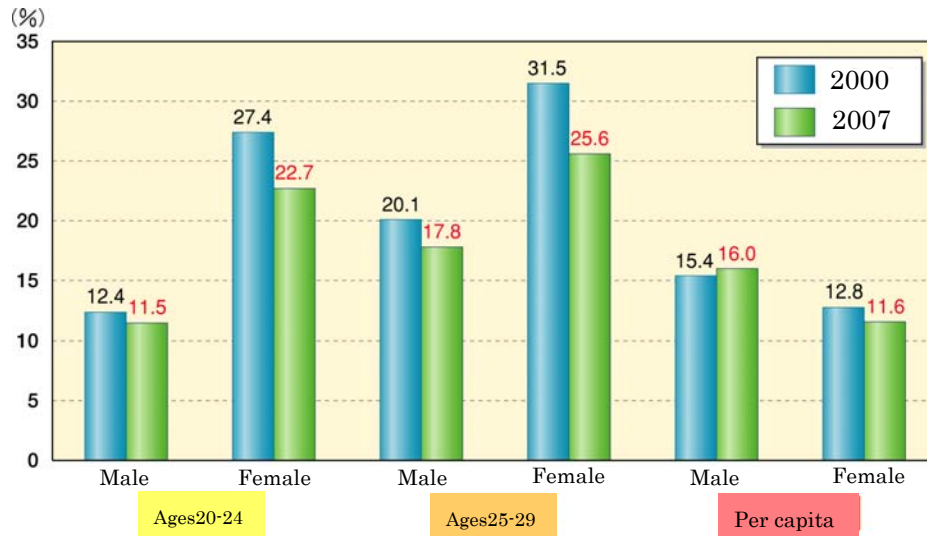
Note: Prepared by the Japan Tourism Agency based on data from the Ministry of Justice and the Ministry of Internal Affairs and Communications.

### Percentages of tourists by age group



Note: Prepared by the Japan Tourism Agency based on data from the Ministry of Justice.

## Percentages of Japanese tourists traveling overseas in their 20s by gender



Note: Prepared by the Japan Tourism Agency based on data from the Ministry of Justice.

## 2. Trends and challenges concerning domestic travel

### (1) Setting targets to be analyzed

Given the ongoing recession in terms of taking domestic overnight trips with accommodations as examined in 1 (1), we set the following targets by age, population size, family composition, and other factors in order to validate the factors that affect the trends in Japanese domestic trips. We also analyzed the present conditions of those targets and related challenges based on such data as the "Field Survey of the Travel Behavior of Japanese in Fiscal 2008."

\* Outline of "Field Survey of the Travel Behavior of Japanese in Fiscal 2008" issued by the Japan Tourism Agency, Ministry of Land, Infrastructure, Transport and Tourism  
Survey period: February 26-29, 2009

Survey method: Internet survey (panel survey)

Survey targets and recovery status: The survey was conducted of 18,278 people in Japan. Of the people surveyed, some college students, working people aged 20-34 (with no children), and parents with children attending elementary school responded that they took from zero up to three domestic overnight trips with accommodations (about the same number as five years ago) or took fewer domestic overnight trips with accommodations than five years ago. From those respondents, 1,030 people were

extracted for each category (3,090 in total) and subjected to a follow-up survey.

1) Young people (\*)

This layer shows different trends for men and women regarding both domestic and overseas travel. Moreover, these young people will lead family trips in the future and exercise a great influence on the trends in mid-to-long-term domestic trips, including the effects on their children.

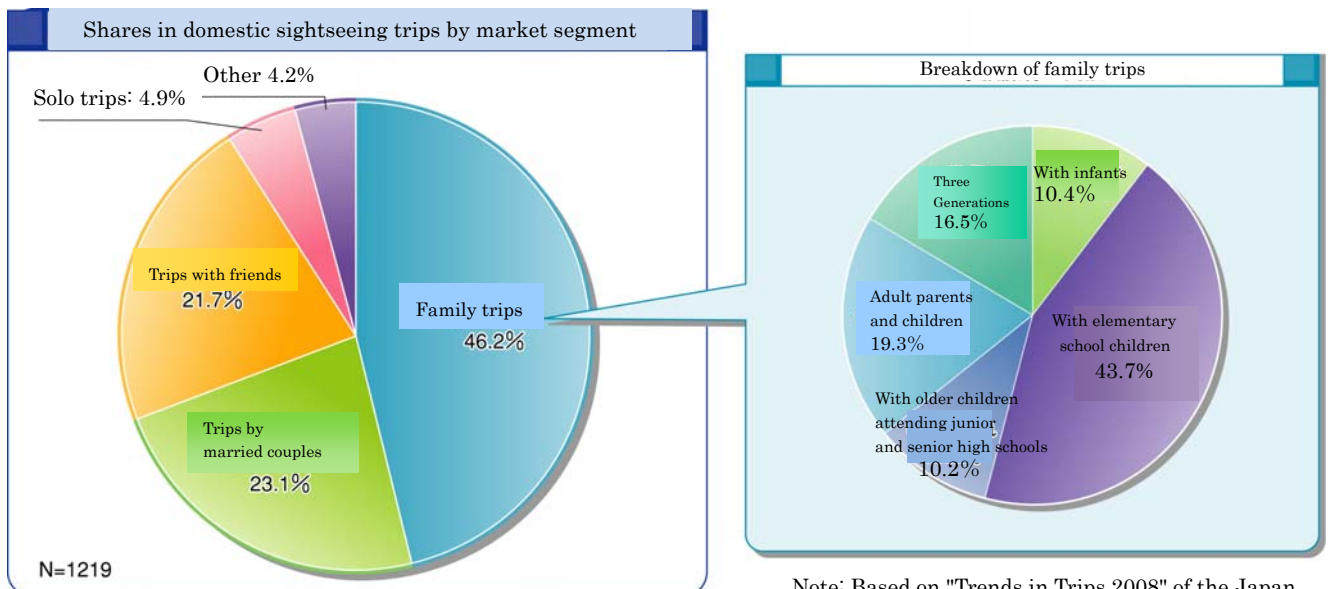
\* Set to ages 20-29. This group accounts for about 15.20 million people or about 12.1% of the total population.

2) Families (\*)

"Trends in Tourists 2008" of the Japan Travel Bureau Foundation reveal that that family trips accounted for 46.2% of all domestic trips in 2007, thus making it the most important category. A breakdown of family trips shows that those involving elementary school children accounted for the highest percentage at 43.7%, and such trips are considered to account for about 20% of all domestic sightseeing trips. Moreover, the travel experience gained by children through such family trips is presumed to have a great influence on future trends in domestic trips.

\* Set as households with elementary school children.

Shares in domestic trips by market segment (2007)



### 3) Baby boomers and people in their 60s (hereafter "baby boomers, etc.")

The number of domestic overnight trips with accommodations taken by people in their 60s in fiscal 2007 was 1.86 (or 1.50 per capita), marking the largest percentage in terms of age group and indicating an important contributing factor to the number of total trips taken by the Japanese public. Moreover, since 2007, baby boomers (those born in 1947-49) are now entering their 60s, and more leisure time after retirement is expected to boost the number of trips taken by baby boomers in the future.

\* "National Census 2005" of the Ministry of Internal Affairs and Communications indicates that baby boomers numbered about 6.74 million (5.4% of the total population), along with about 15.90 million people aged 60-69 (about 12.6% of the total population).

## (2) Trends and Challenges concerning Domestic Travel by Young People

### 1) Present Status of Domestic Travel

The numbers of domestic overnight trips with accommodations taken by young people in fiscal 2003 to 2007 showed fewer trips taken by males and more trips by females. Comparisons in terms of both age group and gender show the fewest trips taken by males and the most trips by females.

Changes in the number of domestic overnight trips with accommodations taken by young people (a survey on consumption trends in travel and sightseeing trips)

			Number of domestic overnight trips with accommodations					Change between FY 2003 and 2007	% change between FY 2003 and 2007
			Fiscal 2003	Fiscal 2004	Fiscal 2005	Fiscal 2006	Fiscal 2007		
Young people	Ages 20-29	Males	1.18	1.14	1.12	1.18	1.16	-0.02	-1.6%
		Females	2.16	1.85	2.22	2.09	1.95	-0.21	-9.7%
		Average	1.67	1.49	1.67	1.63	1.56	-0.11	-6.5%
Total Japanese population		Average	1.70	1.71	1.77	1.68	1.50	-0.20	-11.8%

Note: Prepared by " National Tourism Survey " issued by the Ministry of Land, Infrastructure, Transport and Tourism.

The numbers of domestic overnight trips with accommodations taken by young people by category (ages 20-24 and 25-29) showed that those who responded "zero times" [never went on a domestic overnight trip with accommodations during the past year (\*)]

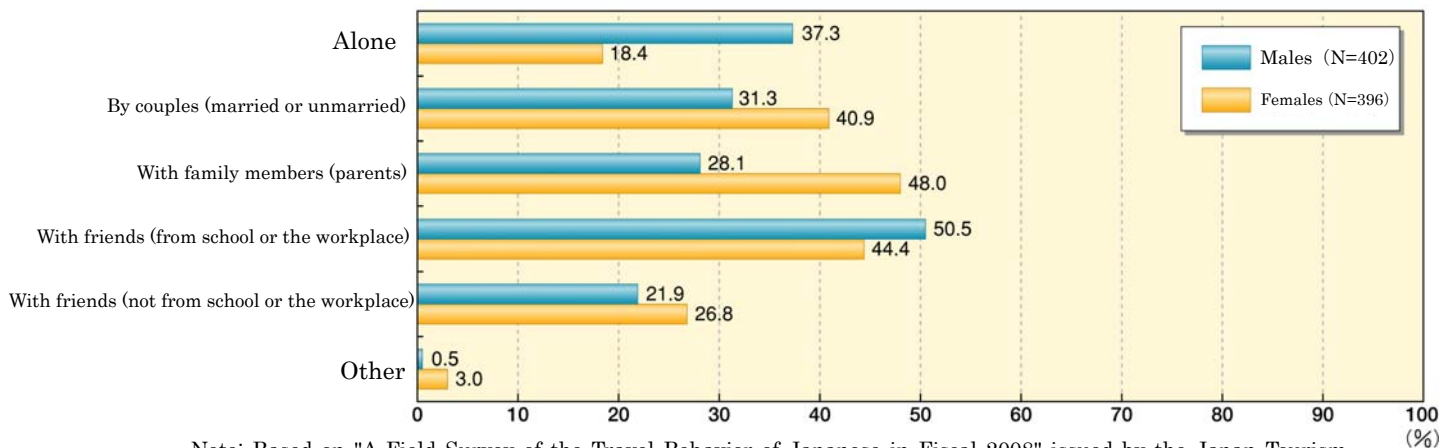
accounted for 41.3% among those aged 20-24, and for 34.1% among those aged 25-29.

Comparing the number of sightseeing trips with accommodations five years ago with the current number shows that the percentage of "zero times" rose 7.8% for those aged 20-24 and 14.1% for those aged 25-29, thereby marking the largest increase in the number of trips.

Examining with whom domestic sightseers went on their overnight trips with accommodations as classified by gender indicates that, for those who went with males, "friends (from school or the workplace)" accounted for the highest percentage (at 50.5%), followed by "alone" (at 37.3%), which was more than double that given by females (at 18.4%). For sightseers who went with females, "family members (parents)" accounted for the largest percentage (at 48.0%), or about 20% higher than that for males.

#### People who accompanied young people on domestic overnight trips with accommodations (by gender)

[People in their 20s, college students and working people (with no children), multiple answers allowed]



Note: Based on "A Field Survey of the Travel Behavior of Japanese in Fiscal 2008" issued by the Japan Tourism Agency, Ministry of Land, Infrastructure, Transport and Tourism.

## 2) Factors that influence travel behavior

Examining the reasons for the declining number of domestic overnight trips with accommodations taken by young people classified as "college students" and "working people" shows responses indicating that a financial reason (e.g., "can no longer afford it") by both college students (47.4%) and working people (52.1%) accounted for the

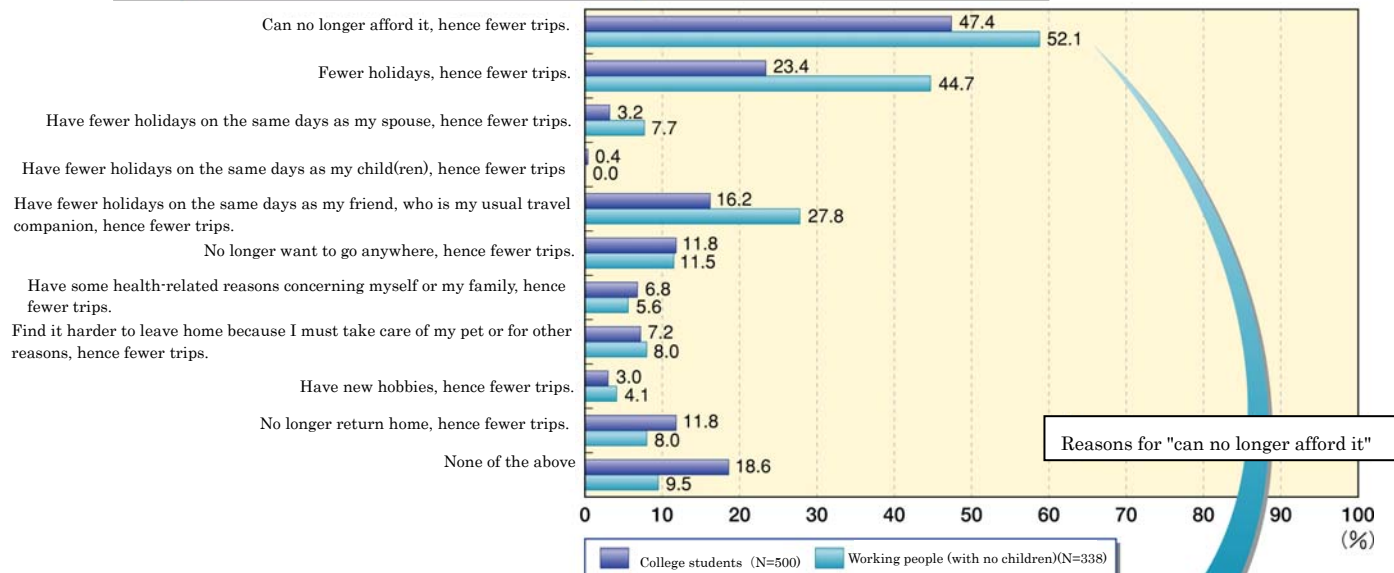
highest percentages. A detailed study of this situation reveals that "have a lower income" or "receive less money from my parents," followed by "put the money in savings now" are the main reasons. It is presumed that many young people have begun reducing the percentage of money spent on consumption.

Moreover, examining the reasons for the declining number of domestic overnight trips with accommodations indicates that working people accounted for most responses related to time, (e.g., "have fewer holidays than before") at 44.7%. Many working people also responded that they "no longer have any holidays on the same days as my friends who always accompanied me on trips." With fewer holidays, they find it harder to take travel holidays on the same days as their usual travel companions.

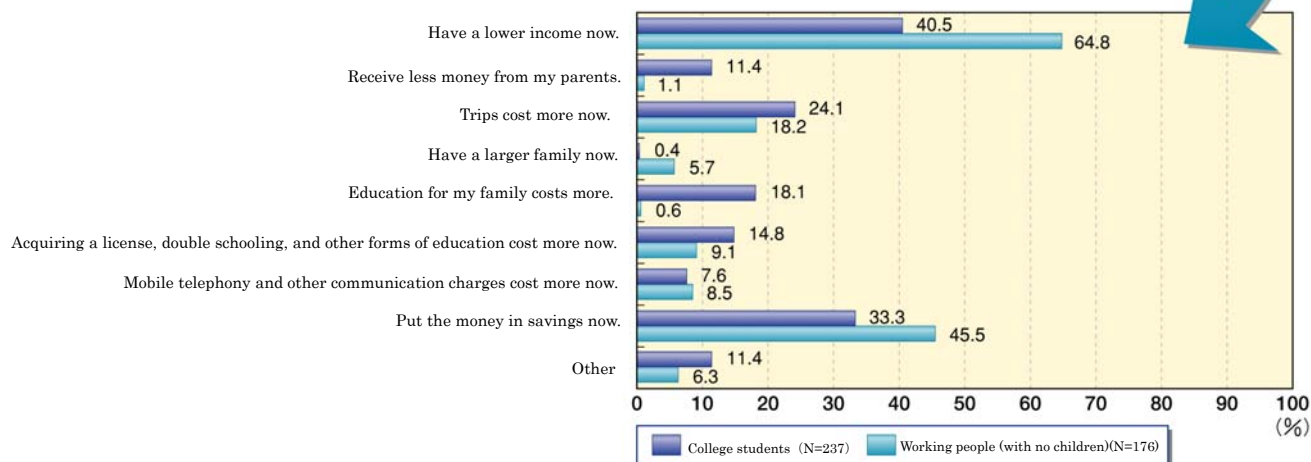


## Reasons for fewer domestic overnight trips with accommodations taken by young people

[People in their 20s, college students and working people (with no children), multiple answers allowed]



Reasons for "can no longer afford it"



### Notes:

1. Based on "Field Survey of the Travel Behavior of Japanese in Fiscal 2008" issued by the Japan Tourism Agency, Ministry of Land, Infrastructure, Transport and Tourism.
2. This survey was conducted of those who responded that their number of overnight trips with accommodations during the year until February 2009 declined from five years before.



### 3) Reasons for domestic trips

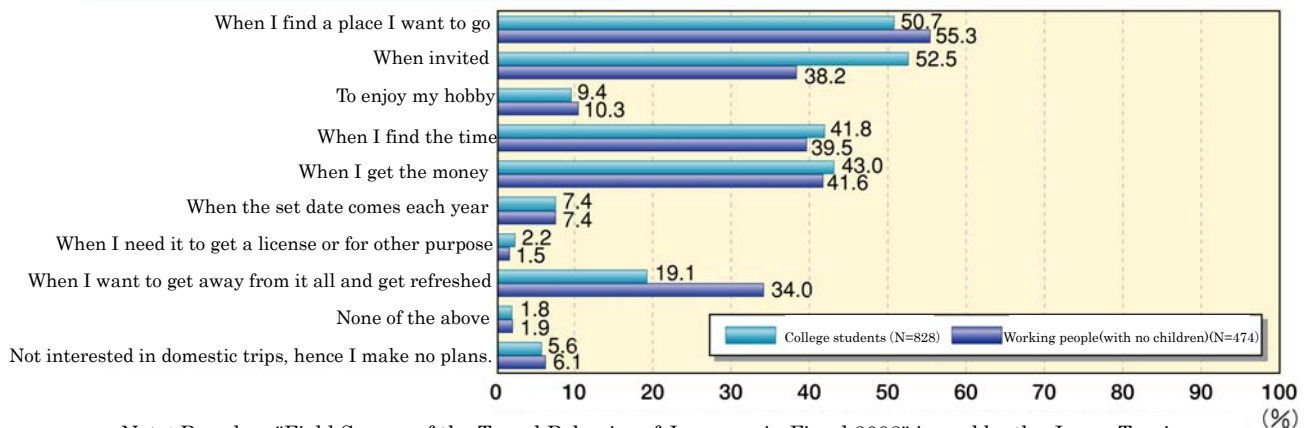
Regarding the "catalysts" that trigger respondents going on a domestic overnight trip with accommodations, an examination of the top three responses among college students revealed that the most important reason was "when invited" (52.5%), followed by "when I find a place I want to go" (50.7%) and "when I get the money" (43.0%).

Among working people, the most important reason is "when I find a place I want to go" (55.3%), followed by "when I get the money" (41.6%) and "when I have time" (39.5%).

Comparing the "catalysts" of college students with those of working people reveals that "when invited" received about 14% more responses from college students than from working people. Among working people, "when I want to get away from it all and get refreshed" received about 15% more responses than from college students.

### Catalysts that trigger people going on a domestic overnight trip with accommodations (young people)

[People in their 20s, college students and working people (with no children), with the top three answers indicated]



Note: Based on "Field Survey of the Travel Behavior of Japanese in Fiscal 2008" issued by the Japan Tourism Agency, Ministry of Land, Infrastructure, Transport and Tourism.

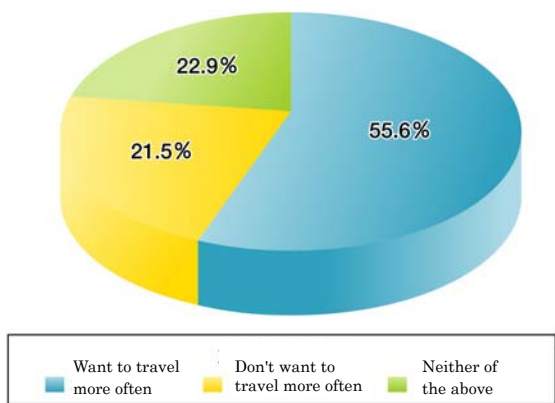
### 4) Wishes for future trips

An examination of the wishes for future domestic trips shows that respondents wishing to travel more often accounted for 55.6% of college students and 62.0% of working people. This reveals that more than half of all young people wanted to travel more often.

A closer look at statistics by the frequency of domestic overnight trips with accommodations reveals that among people who had been on one or more domestic overnight trips with accommodations during the past year, those who wanted to travel more often accounted for about 60-70% among both college students and working people. In contrast, among people who had traveled zero times, those who wanted to travel more often accounted for less than 50% among both college students (40.1%) and working people (48.9%). This trend is particularly notable for college students, among which more than 30% did not want to take trips more often. This may affect future trends in domestic travel, such by bipolarizing people as travelers or non-travelers.

### Upward trend in trips by young people (college students)

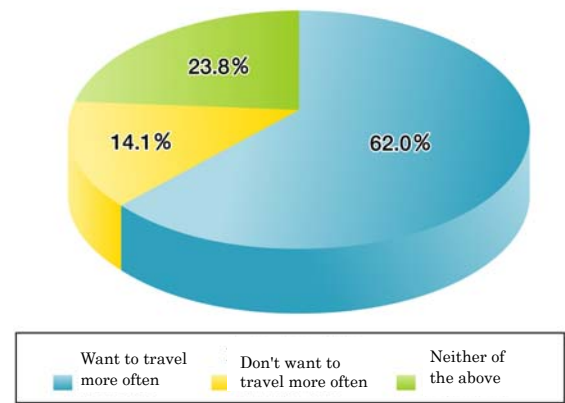
[People in their 20s, college students] (N=828)



Note: "Field Survey of the Travel Behavior of Japanese in Fiscal 2008" issued by the Japan Tourism Agency.

### Upward trend in trips by young people (working people)

[People in their 20s, working people (with no children)] (N=474)

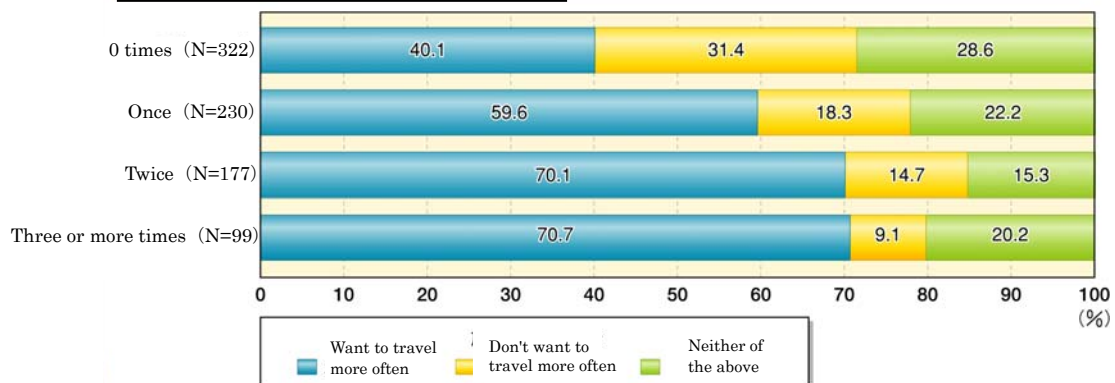


Note: "Field Survey of the Travel Behavior of Japanese in Fiscal 2008" issued by the Japan Tourism Agency.

### Upward trend in travel frequency (college students)

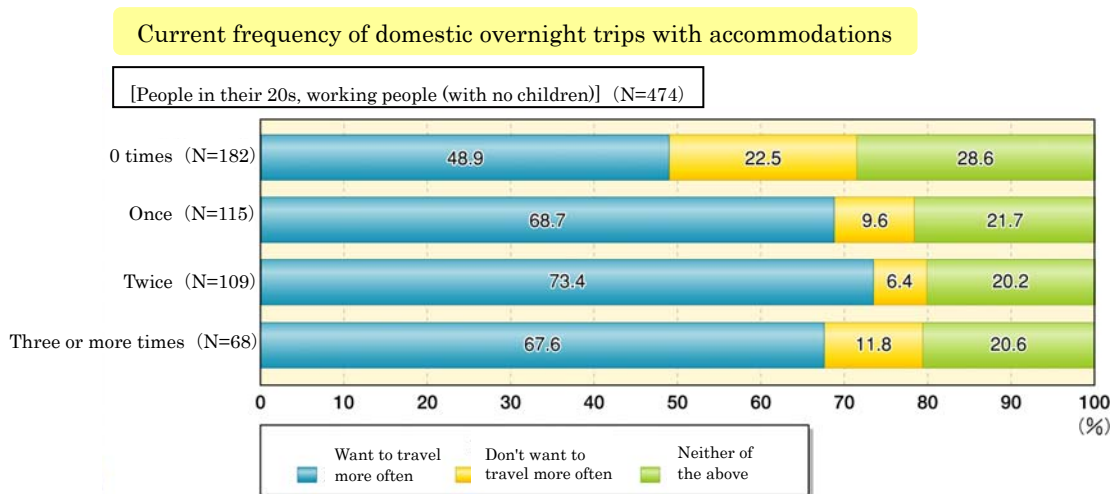
#### Current frequency of domestic overnight trips with accommodations

[People in their 20s, college students] (N=828)



Note: "Field Survey of the Travel Behavior of Japanese in Fiscal 2008" issued by the Japan Tourism Agency, Ministry of Land, Infrastructure, Transport and Tourism.

## Wishes to travel more often (working people)



Note: "Field Survey of the Travel Behavior of Japanese in Fiscal 2008" issued by the Japan Tourism Agency, Ministry of Land, Infrastructure, Transport and Tourism.

### 5) Directions of future efforts

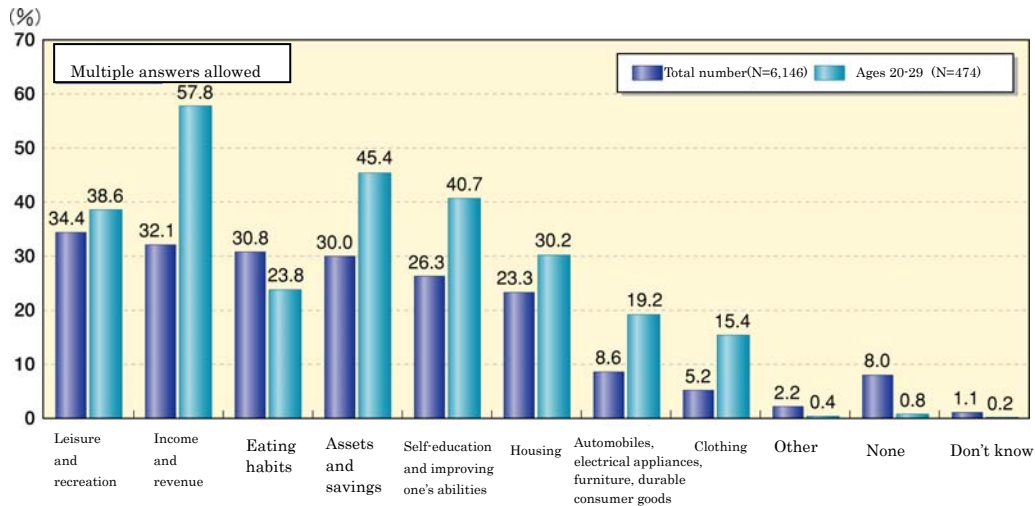
As discussed above, it has been clarified that among young people, the frequency of domestic overnight trips with accommodations for men in their 20s has drastically dropped, while those who never go on a trip show an upward trend. However, more than half of young people want to travel more often domestically, thereby calling for efforts to meet the needs of such young people having diverse interests.

For example, concerning areas where young people want to emphasize in their future life, many young people indicate "income and revenue," "assets and savings," and other financial aspects, as well as "self-education and improving one's abilities." To meet these needs of young people, it is considered important to promote experience-based trips and other forms of travel, together with other activities that are effective in allowing young people to acquire more knowledge and enhance their education, as well as to change the image of tourism itself as epitomized by visiting scenic spots and enjoying leisure time.

It is particularly important to incorporate trips into group and similar activities, especially for college students, in order to develop appealing travel content that will attract young people. For working people, it is necessary to pave the way for

promoting the acquisition of paid leave. As such, efforts should be made in a manner that meets the needs of specific groups.

### Main emphasis in future life



Note: Based on "Opinion Poll on Japanese People's Lives" (a survey of June 2008) conducted by the Governmental Public Relations Office, Minister's Secretariat, Cabinet Office, Government of Japan.

### (3) Trends and challenges concerning domestic family trips

#### 1) Domestic travel today

The frequency of domestic overnight trips with accommodations taken by families was 1.56 in fiscal 2007, remaining comparable to 1.50 for all Japanese people.

#### Frequency of family trips taken with elementary school children

N=1030

			Fiscal 2007
Families	Ages 30-39	Average	1.56
All Japanese people			Average 1.50

Note: Based on the findings of "Field Survey of the Travel Behavior of Japanese in Fiscal 2008" issued by the Japan Tourism Agency, Ministry of Land, Infrastructure, Transport and Tourism, for people in their 30s, the ratios of families with and without elementary school children in the annual frequency of domestic overnight trips with accommodations were calculated to correct

Comparing the frequency of domestic sightseeing trips taken today with that of five years ago shows that the percentage of those who went "zero times" (who had never been on an overnight trip with accommodations during the past year) was 28.1%, marking a 15.0% rise during the past five years and indicating a lower frequency of trips.

## 2) Factors that affect travel behavior

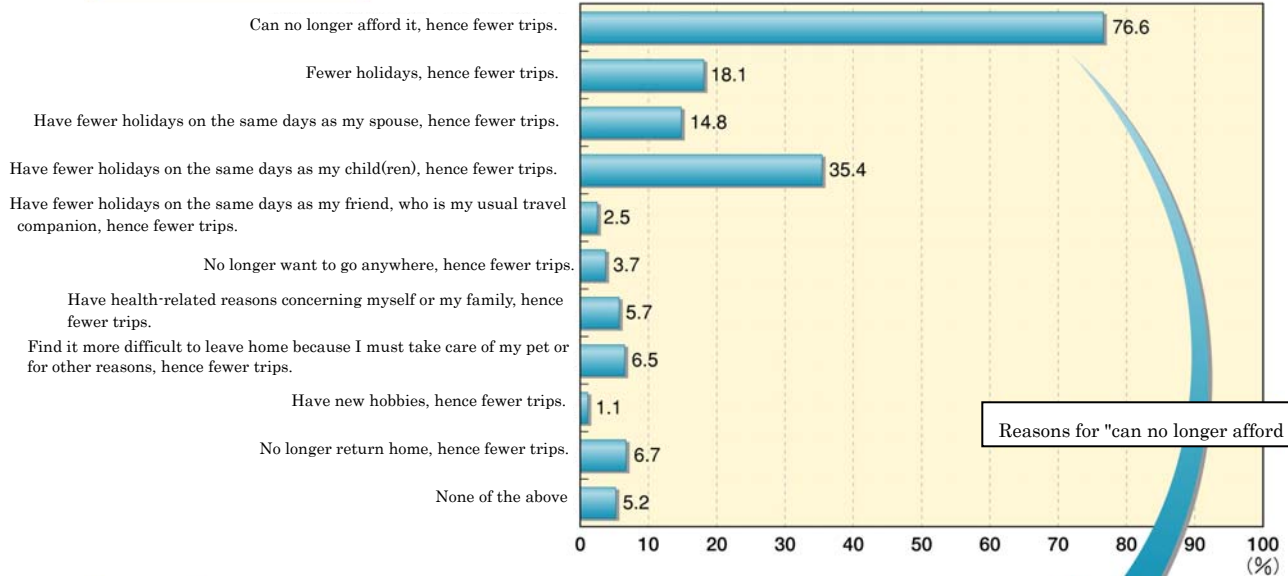
Examining the reasons for the lower frequency of domestic overnight trips with accommodations reveals that, just like young people, this group gave most responses pertaining to financial reasons, saying "can no longer afford it" (76.6%). Of these, the most important factor was "education costs more now" (61.2%).

Moreover, among the reasons for the lower frequency of domestic overnight trips with accommodations other than financial reasons, most responses were about time-related factors, saying "have fewer holidays on the same days as my child(ren)" (35.4%).

Parents generally have fewer holidays on the same days as their children, and are finding it more difficult to go on domestic overnight trips with accommodations.

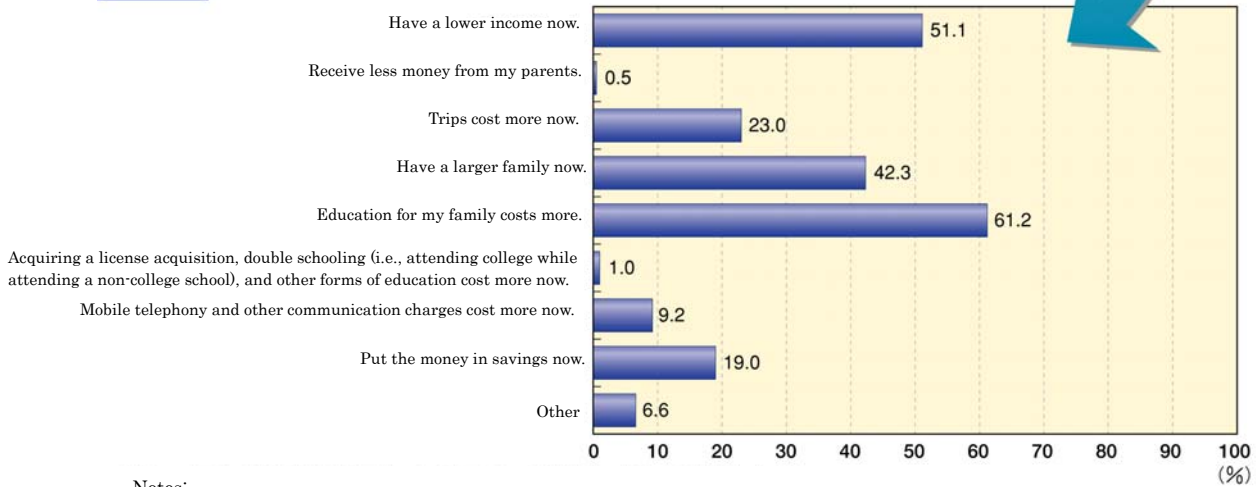
## Reasons for fewer domestic overnight trips with accommodations taken by families

[Families (N = 751), multiple answers allowed]



Reasons for "can no longer afford it"

[N=575]



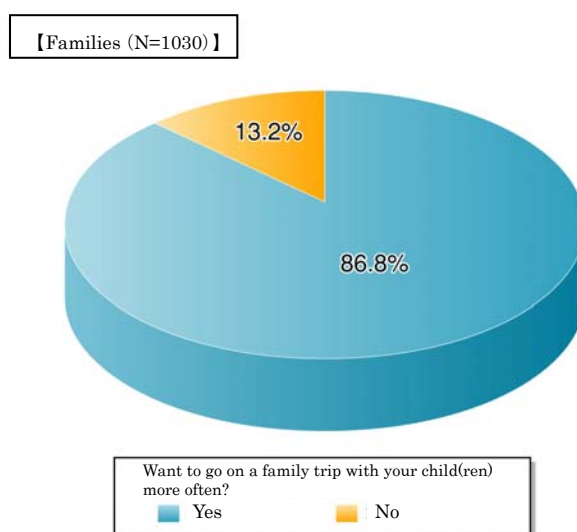
Notes:

1. Based on "Field Survey of the Travel Behavior of Japanese in Fiscal 2008" issued by the Japan Tourism Agency, Ministry of Land, Infrastructure, Transport and Tourism.
2. This survey was conducted of those who responded that the number of their domestic overnight trips with accommodations during the year until February 2009 declined from five years before.

### 3) Wishes concerning future travel

Wishes concerning future domestic overnight trips with accommodations showed that respondents wishing to take more trips with their children accounted for 86.8%, thereby reflecting a very strong desire among families to travel more often.

#### Wishes to travel more often with family (family trips with children)



Note: Based on "A Field Survey of the Travel Behavior of Japanese in Fiscal 2008" of the Japan Tourism Agency, Ministry of Land, Infrastructure, Transport and Tourism.

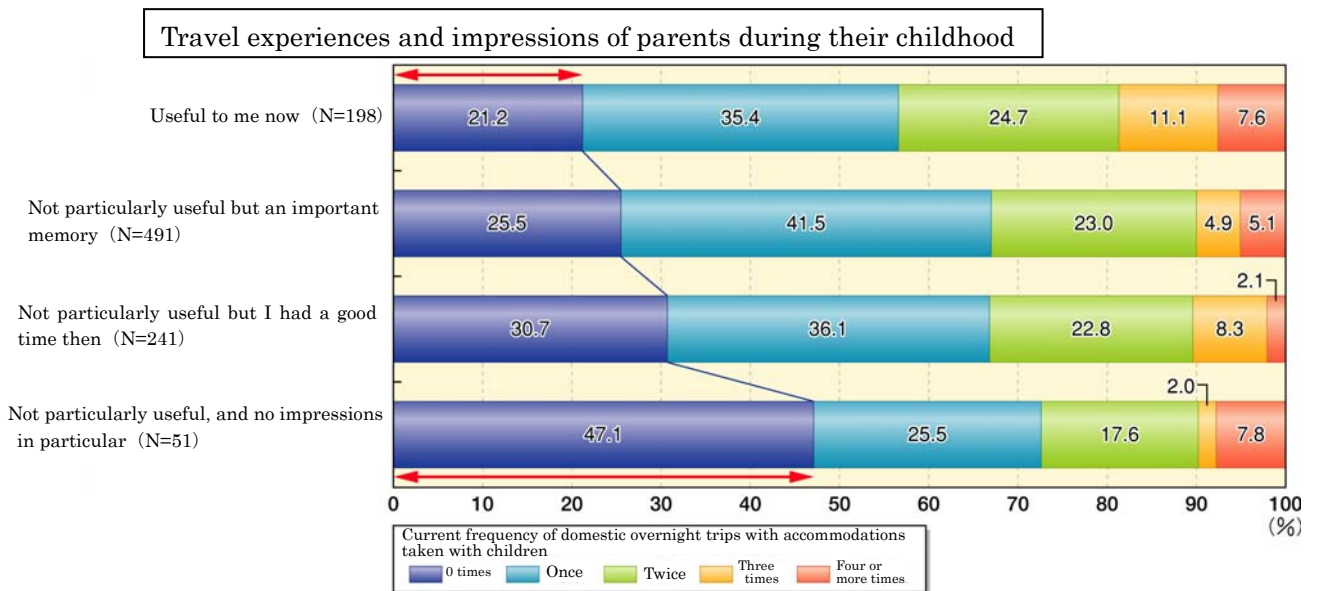
### 4) Directions of future efforts

Occupying the largest share in the market of domestic sightseeing trips, families strongly desire to travel more often. However, it is presumed that their taking domestic overnight trips with accommodations is affected by the difficulty in finding financial leeway due to higher educational expenses and other costs, a decline in income, the greater difficulty among parents in finding holidays on the same days as their elementary school children, and other reasons.

However, the more positive the travel experiences and impressions that parents had during their childhood, the more often they tend to go on family trips as parents themselves. Therefore, promoting a significant number of family trips will apparently be an important effort toward promoting family trips with children in the future.

To meet these needs, travel products must be developed within affordable price ranges and with other activities being conducted, thereby alleviating the expenses incurred for family trips. Moreover, acquiring annual paid leave and making school holidays more diverse and flexible must be promoted, thereby paving the way for more family trips. There are also high expectations for developing sightseeing spots and travel products that can meticulously meet the specific needs of families on their trips.

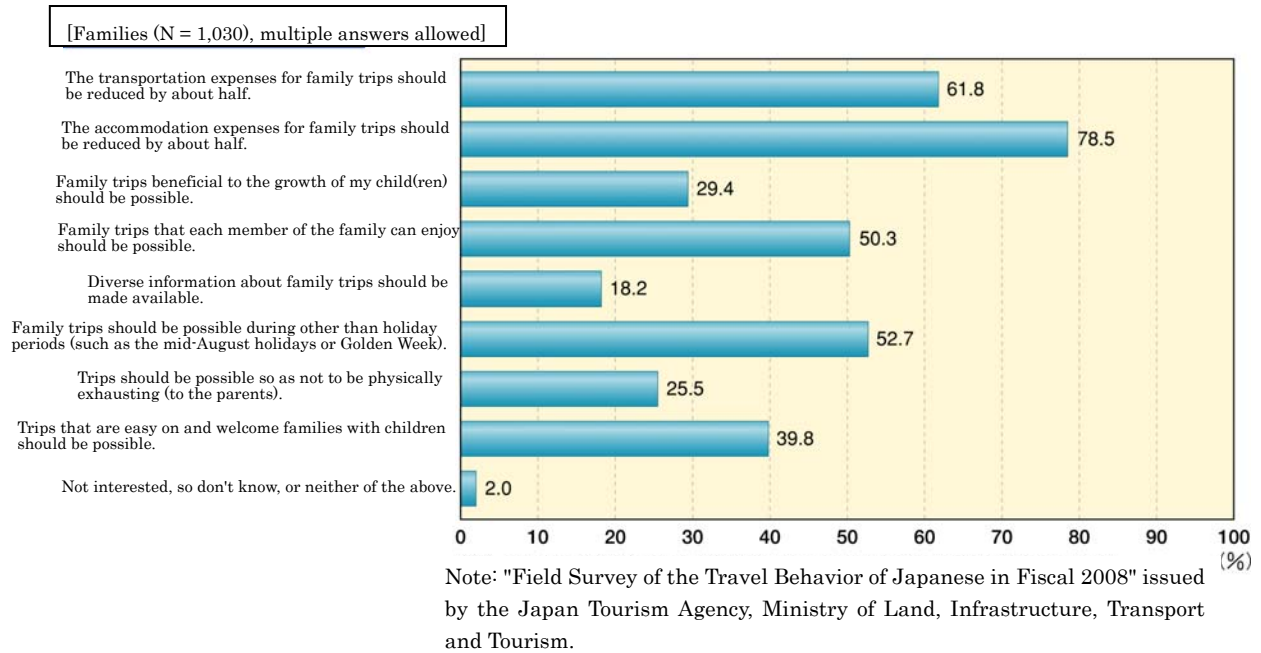
Travel experiences and impressions of parents during their childhood, and the frequency of trips with their children



Note: "Field Survey of the Travel Behavior of Japanese in Fiscal 2008" issued by the Japan Tourism Agency, Ministry of Land, Infrastructure, Transport and Tourism.



## Conditions for adding another trip per year



### (4) Trends and challenges concerning the travel behavior of baby boomers, etc.

#### 1) Domestic travel today

The frequency of domestic overnight trips with accommodations taken by people in their 60s in fiscal 2007 was 1.86 (1.91 for males, 1.81 for females), 0.36 higher than that per capita (at 1.50) and therefore the highest among all age groups.

A closer look at changes in the frequency of trips reveals a 0.33 (15.0%) decline in the trips taken by people in their 60s in fiscal 2007 from the preceding year, however, marking the greatest reduction among all age groups.

Changes in the frequency of trips taken by people in their 60s including baby boomers (a survey of consumption trends in travel and sightseeing trips)

			Frequency of domestic overnight trips with accommodations					Increase in frequency from FY 2003-2007	% increase from FY 2003-2007
			FY 2003	FY 2004	FY 2005	FY 2006	FY 2007		
People in their 60s including baby boomers	Ages 60-69	Males	2.00	2.36	2.15	2.20	1.91	-0.09	-4.5%
		Females	2.00	2.25	2.46	2.17	1.81	-0.20	-9.5%
	Average	2.00	2.31	2.30	2.18	1.86	-0.15	-7%	
[Reference] Ages 70-79	Average	1.64	1.86	1.99	1.78	1.48	-0.16	-9.8%	
All Japanese people	Average	1.70	1.71	1.77	1.68	1.50	-0.20	-11.8%	

Note: Based on " National Tourism Survey " issued by the Japan Tourism Agency, Ministry of Land, Infrastructure, Transport and Tourism.

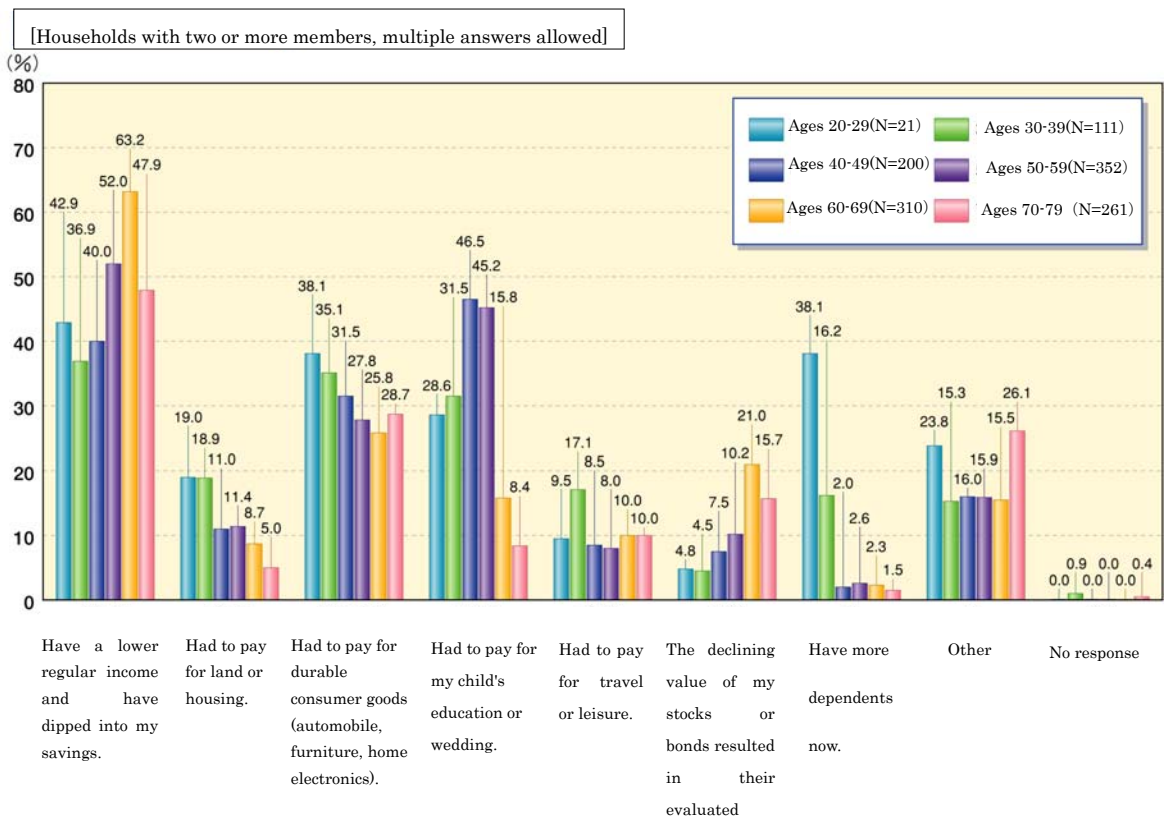
## 2) Factors that affect travel behavior

Baby boomers, etc. are expected to expand their leisure activities after retirement more than current retirees, and thus form a layer that will lead the market of domestic trips. However, the frequency of domestic overnight trips with accommodations in fiscal 2007, the year when some baby boomers reached age 60, declined greatly as discussed above.

A situation where the frequency of trips taken by baby boomers, etc. fails to rise as expected must be analyzed from various angles. One possible financial factor pertains to anxiety over the future, and declining asset value has incessantly raised people's motivation to save more money, thereby keeping domestic consumption low.

Moreover, one possible time-related factor is that because more corporations are extending the retirement age of their employees, the leisure time for baby boomers only grows at sluggish pace.

### Reasons for the decline in the balance of savings (2008)



Note: Based on "An Opinion Poll on the Financial Behavior of Household Economics in 2008" issued by the Central Council for Financial Service Information.

### 3) Directions of future efforts

People in their 60s, many of whom generally reach retirement age, are expected to expand their leisure activities after retirement. However, as discussed above, fiscal 2007 saw a great decline in the number of domestic overnight trips with accommodations taken by people in their 60s.

However, baby boomers, etc. have much savings and will eventually retire, even if their retirement ages are extended. They are therefore expected to lead travel demand as the main domestic tourists.

To promote the domestic trips taken by baby boomers, etc., we must apparently expect that retirees will have more leisure time, work to build sightseeing spots that meet the needs of stay-oriented trips, weekday trips and other forms of travel, satisfy the satisfaction of baby boomers, etc. with domestic overnight trips, and encourage repeat demand. There are also high expectations for the development of travel products targeting married couples who will presumably travel more after retirement.

The main means of transport for domestic trips is the privately owned car. As baby boomers, etc. become older, they will presumably find travel using their own cars more difficult. It is therefore necessary to arrange a means of transport and develop travel products and related items based on the concept of universal design, thereby further facilitating travel.

### 3. Trends and Challenges concerning Overseas Travel

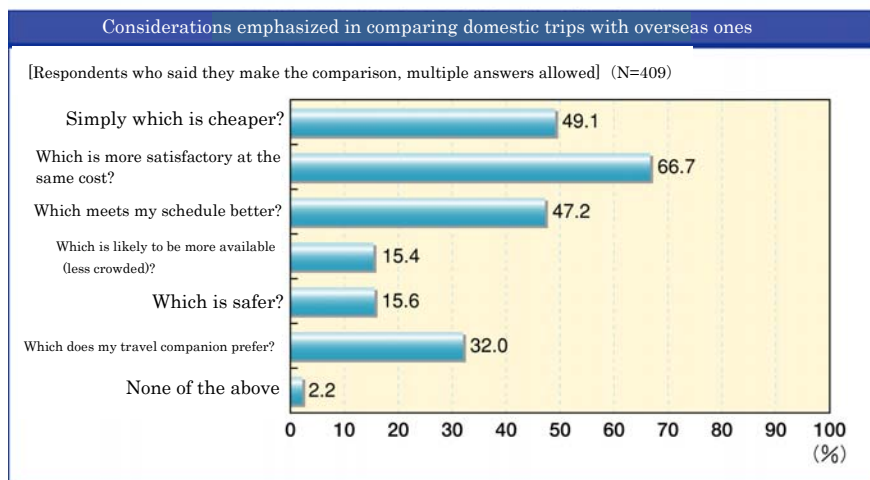
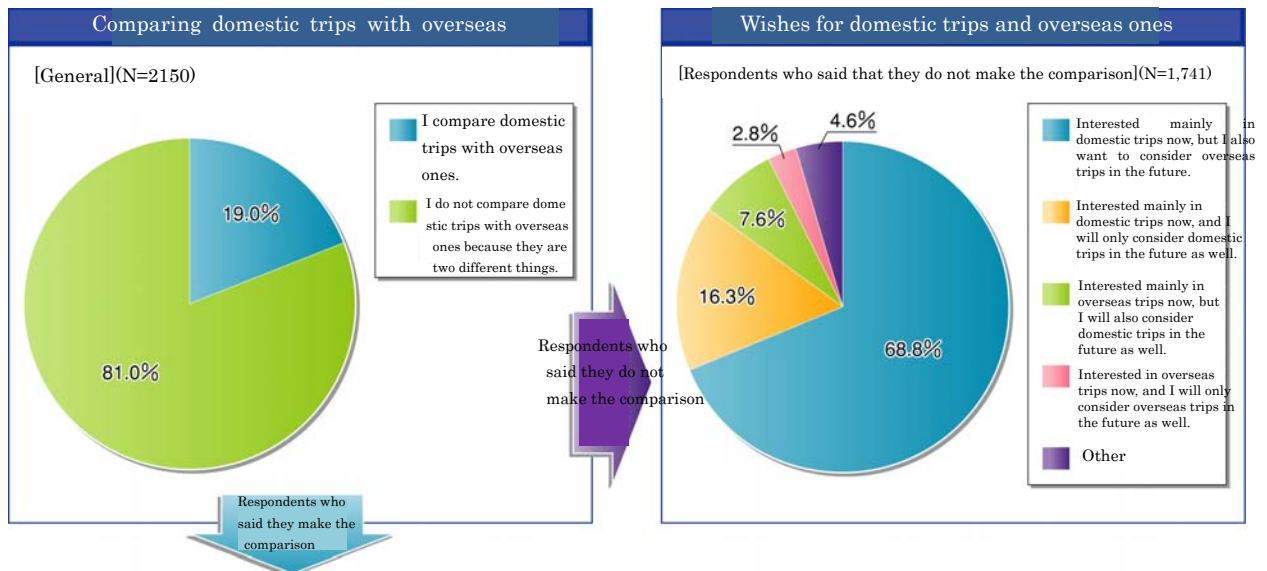
#### (1) Wishes for Overseas Trips and Domestic Trips

Comparing the implementation rates of overseas trips and domestic overnight trips with accommodations involving Japanese travelers (i.e., percentage of people who went on at least one trip in a year) reveals a rate of 68.7% for domestic overnight trips with accommodations in 2008, opposed to a rate as low as 16.8% for overseas trips in 2008.

One of the main factors causing the difference in implementation rates is that overseas trips are generally costlier than domestic trips and last longer. Conversely, about 80%

of travelers "do not compare domestic trips with overseas ones because they are two different things" when regarding whether domestic trips should be compared with overseas ones when going on a trip. Therefore, overseas trips need not to be simply compared with domestic ones but to analyze the characteristics of overseas trips.

Concerning the layer of respondents who "do not compare domestic trips with overseas ones because they are two different things," an examination of their tastes regarding domestic and overseas travel revealed that about 85% say that they are "interested mainly in domestic trips now." At the same time, since nearly 70% (68.8%) "also want to go on overseas trips in the future," people are also very interested in taking overseas trips.



Note: Based on "Field Survey of the Travel Behavior of Japanese in Fiscal 2008" issued by the Japan Tourism Agency, Ministry of Land, Infrastructure, Transport and Tourism.

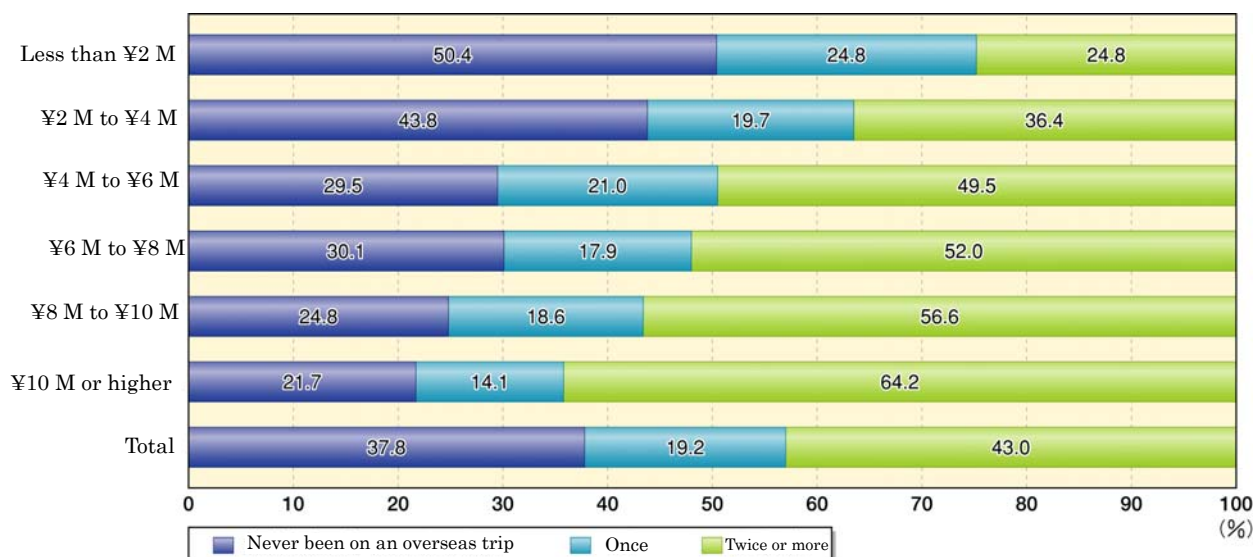
(2) Factors that affect the implementation of overseas trips

"A Survey of Young People's Awareness of Overseas Trips" conducted by the Japan Association of Travel Agents revealed that the top-ranking reasons why young people do not want to go on overseas trips include "don't know if they have value" and "it's bothersome to adapt to environmental changes." The same survey also revealed that the reasons for dissatisfaction when young people want to go on overseas trips include "such trips are too costly" and "it's hard to know how much each item costs on an overseas trip."

1) Economic factors that affect the implementation of overseas trips

Examining the relationship between the frequency of overseas trips and a household's annual income reveals a great difference in whether trips are taken, with household annual income of 4 million yen set as the borderline. The percentage of those who have been on at least two overseas trips rises as a household's annual income increases.

Household annual income and overseas trips

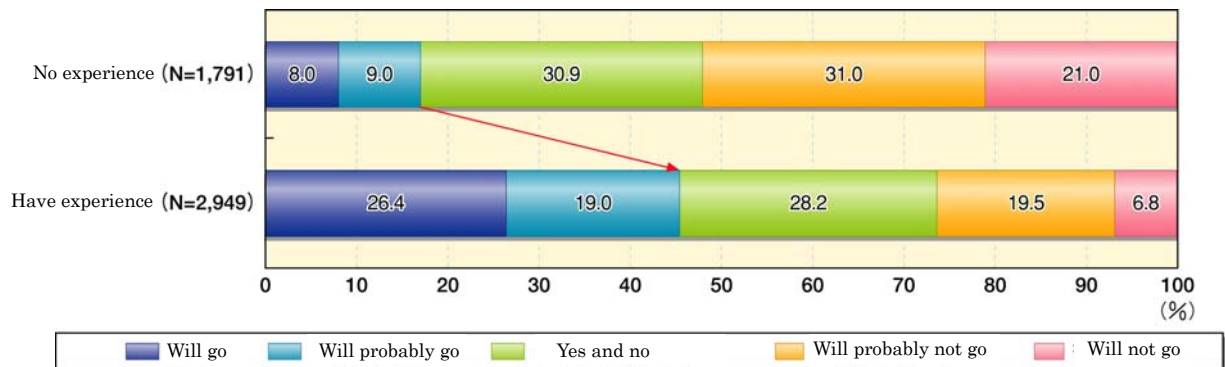


Note: Based on "A Survey of Young People's Awareness of Overseas Trips" issued in October 2008 by the Japan Association of Travel Agents.

## 2) Wishes for overseas trips in the future

Among those who have never been on an overseas trip, those who responded that they "will go" or "will probably go" on an overseas trip by the end of 2010 (17.0%) does not even reach half the percentage of those who have been on overseas trips (45.4%). Regarding overseas trips, the survey revealed great differences in the wishes for overseas trips depending on whether respondents have had such an experience before.

Wishes for overseas trips by 2010



Notes:

1. Based on "A Survey of Young People's Awareness of Overseas Trips" issued in October 2008 by the Japan Association of Travel Agents.
2. The respondents were asked whether they would actually go on overseas trips for personal purposes in any reasons by 2010.

## (3) Directions toward promoting overseas trips

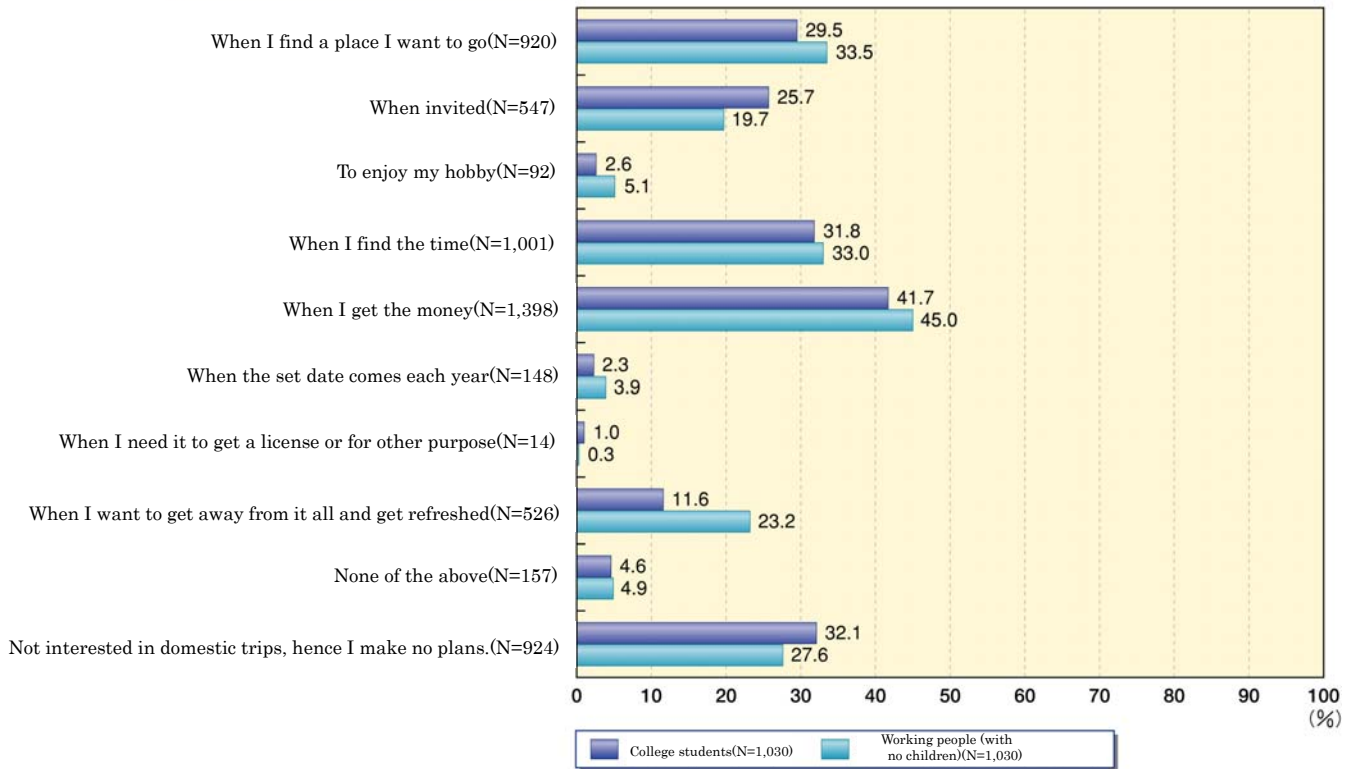
A closer look at the catalysts that trigger people to plan an overseas trip reveals that, among college students and working people aged 20-34, the economic factor of "when I get the money" accounts for the highest percentage, followed by "when I have the time," "when invited," "when I want to get away from it all," and other time-related and psychological factors. Moreover, the response "Not interested in overseas trips, so I don't plan them" accounts for about 30%, indicating that many people do not recognize overseas trips as an option as compared to domestic trips (5% for the same answer).

As discussed above, whether people have experienced an overseas trip is considered to greatly affect their wishes for overseas travel. Therefore, further efforts must be made to increase public interest in things overseas, while bearing in mind that the percentage

of men and women (aged 20 to 34) going abroad is definitely on a downward trend.

### Catalysts that trigger people going on overseas trips

[College students and working people (with no children), 3 top-ranking answers given]



Note: Based on "Field Survey of the Travel Behavior of Japanese in Fiscal 2008" issued by the Japan Tourism Agency, Ministry of Land, Infrastructure, Transport and Tourism.

## Section 2 Toward Realizing an Era When 20 Million Foreign Tourists Visit Japan: Building an Adored Nation with the Spirit of Hospitality

In March 2009, the Tourism Nation Promotion Strategic Conference (chaired by Jiro Ushio, CEO & Chairperson of Ushio Inc.) compiled a proposal entitled "Toward Realizing an Era When 20 Million Foreign Tourists Visit Japan: Building an Adored Nation with the Spirit of Hospitality" and based on three pillars of measures—"overseas promotion (establishing the Japan brand)," "improvement of the system to receive visitors," and "attracting international conferences and other events"—toward the goal

of increasing the number of foreign tourists visiting Japan to 20 million by 2020.

To increase the number of foreign tourists visiting Japan to 20 million by 2020, we must base ourselves on this proposal and work on the following matters as one unit, while collaborating not only with other officials of the Government of Japan but also with the representatives of all local governments, private companies, and other entities concerned.

- Position Japan's high-quality living environment worthy of praise on an international level, along with its sophisticated culture, arts, cuisine and other forms of "diversity" in the country's appeal as the core of the Japan brand, step up our promotions in China, South Korea, Taiwan and other nations (numbering 12 economies in total), and extend our travel promotion to India, Russia, Malaysia and other newly emerging markets that are expected to see growing demand for travel to Japan.

- Alleviate the requirements for issuing visas to tourists by such means as introducing "private tourist visas" without travel attendants for Chinese travelers of sufficient financial means, shorten the waiting times at passport control, post more and better designed labels in foreign languages at public means of transport and other public establishments, arrange better resources for receiving foreign travelers at lodging facilities, and devise other means of receiving foreign visitors to Japan, thereby making Japan a more "hospitable" nation.

- Generally extend the targets of attracting and hosting international conferences from international conventions in a narrow sense to cultural and sports events, exhibitions, trade fairs, and other international conferences in a broad sense (MICE).

\* MICE: Stands for Meeting, Incentive (Travel), Convention, Event/Exhibition.

## Part II The Situation and Measures for Tourism in Fiscal 2008

### Chapter 1 Tourism Today

#### **Section 1 Trends in Tourism by the Japanese Public**



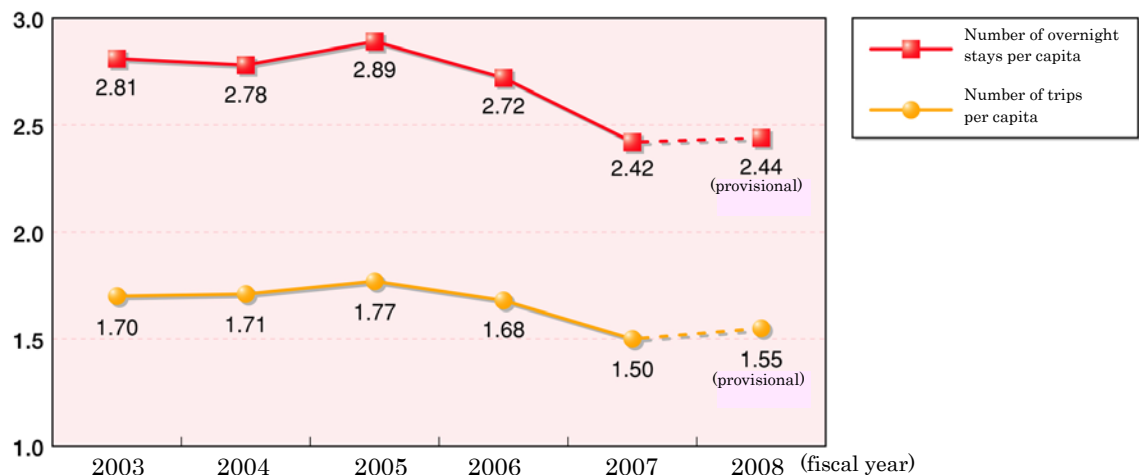
## 1. Trends in Domestic Overnight Trips with Accommodations by the Japanese Public

### (1) Outline of Domestic Overnight Trips with Accommodations

The frequency of domestic overnight trips with accommodations per capita in fiscal 2008 was estimated at 1.55, up 3.3% from one year before. The number of nights stayed on domestic sightseeing trips per capita was estimated at 2.44, up 0.8% from one year before.

#### Changes in the number of domestic overnight trips with accommodations and the number of nights stayed

(nights stayed, trips)



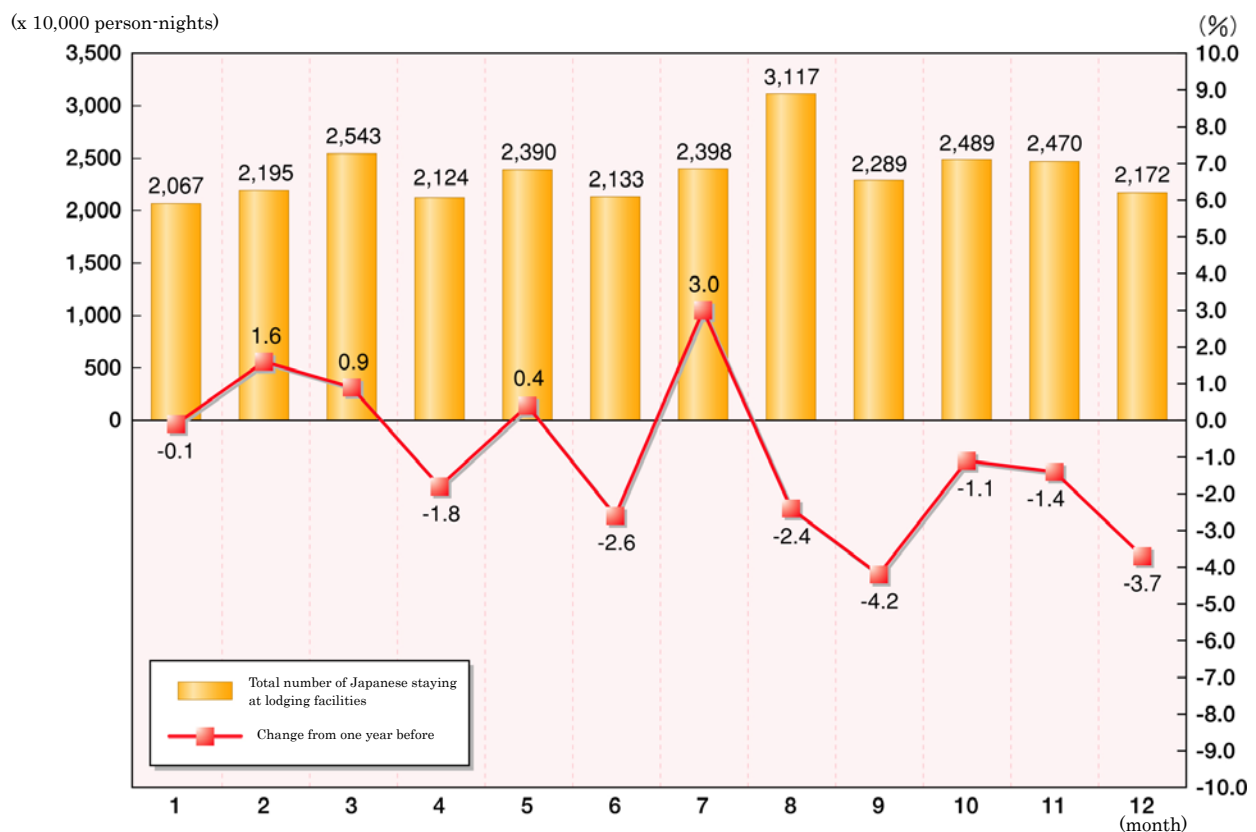
Note: Based on " National Tourism Survey " of the Japan Tourism Agency, Ministry of Land, Infrastructure, Transport and Tourism.

### (2) Outline of Accommodations

In January 2007, " Accommodation Survey (Approved Statistics)" was initiated to determine: (1) the total numbers of people staying at hotels, inns, and simple lodging facilities with a workforce of 10 or more employees, (2) the statistics for all prefectures, and (3) according to national uniform standards. This survey revealed that from January to December 2008 a total of 306.15 million people stayed at such accommodations, with Japanese accounting for 283.87 million.

Comparing these statistics by month shows that August accounted for the highest number of visitors at 31.17 million, while January accounted for the smallest number at 20.67 million. However, the statistics for August and later months showed a series of declines on a year-on-year basis for five consecutive months due to adverse effects of the business slowdown.

Total numbers of Japanese staying at lodging facilities by month (2008)



Notes:

1. Based on "Accommodation Survey" issued by the Japan Tourism Agency, Ministry of Land, Infrastructure, Transport and Tourism.
2. These are figures obtained prior to the incorporation of annual data on new and obsolete facilities, and the finalized values may show slight changes.

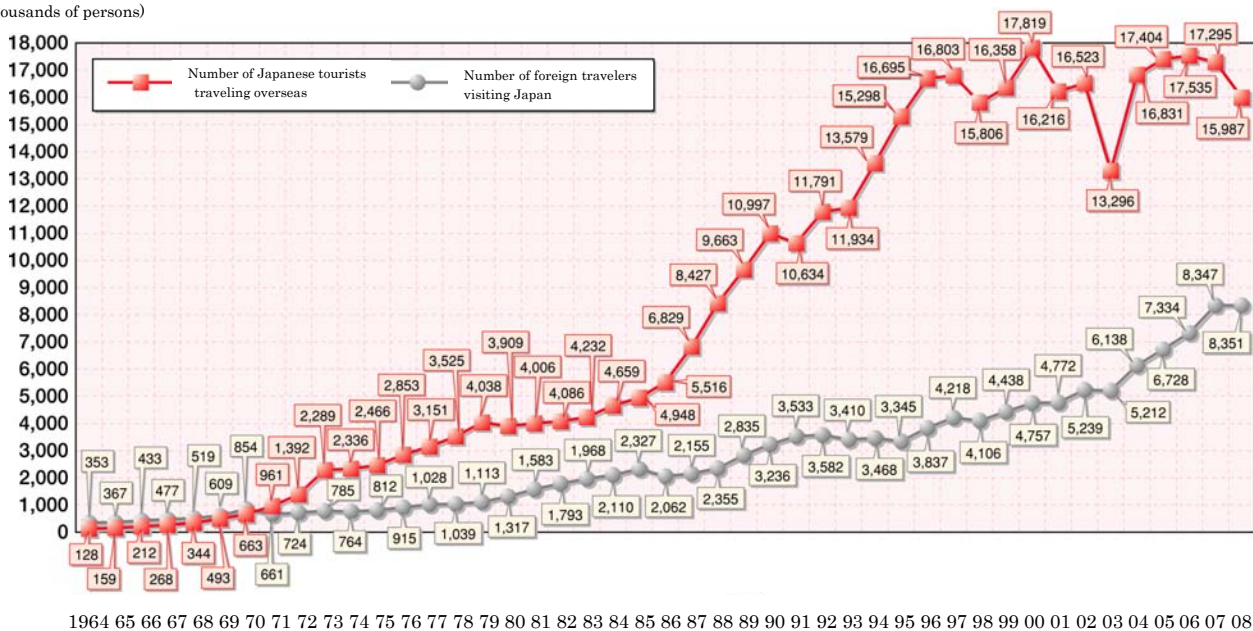
## 2. Trends in Overseas Travel by the Japanese Public

### (1) Changes in the Number of Tourists Traveling Overseas

Tourists traveling overseas numbered about 15.99 million in 2008. Given the rising fuel surcharges and global business recession, those statistics reveal a general slowdown in travel. This number declined by about 1.31 million from the preceding year, or 7.6% down from last year.

Changes in the number of Japanese tourists traveling overseas

(in thousands of persons)



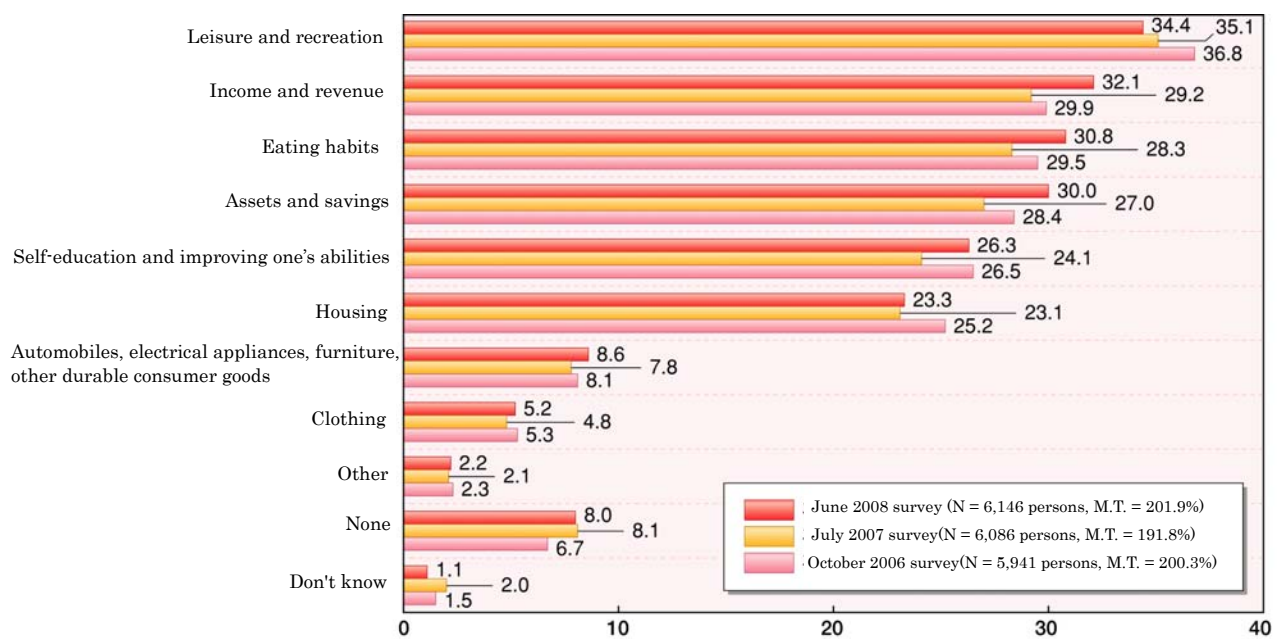
1964 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00 01 02 03 04 05 06 07 08

Note: Prepared by the Japan Tourism Agency based on documents compiled by the Ministry of Justice and the Japan National Tourism Organization (JNTO). (year)

### 3. Trends and Realities in Japanese Awareness concerning Travel and Other Matters

Among the areas which people want to emphasize in their future lives, "leisure and recreation" accounts for the highest percentage at 34.4% and is increasing. That area is followed by "income and revenue" and "eating habits."

## Emphasis points in future lives



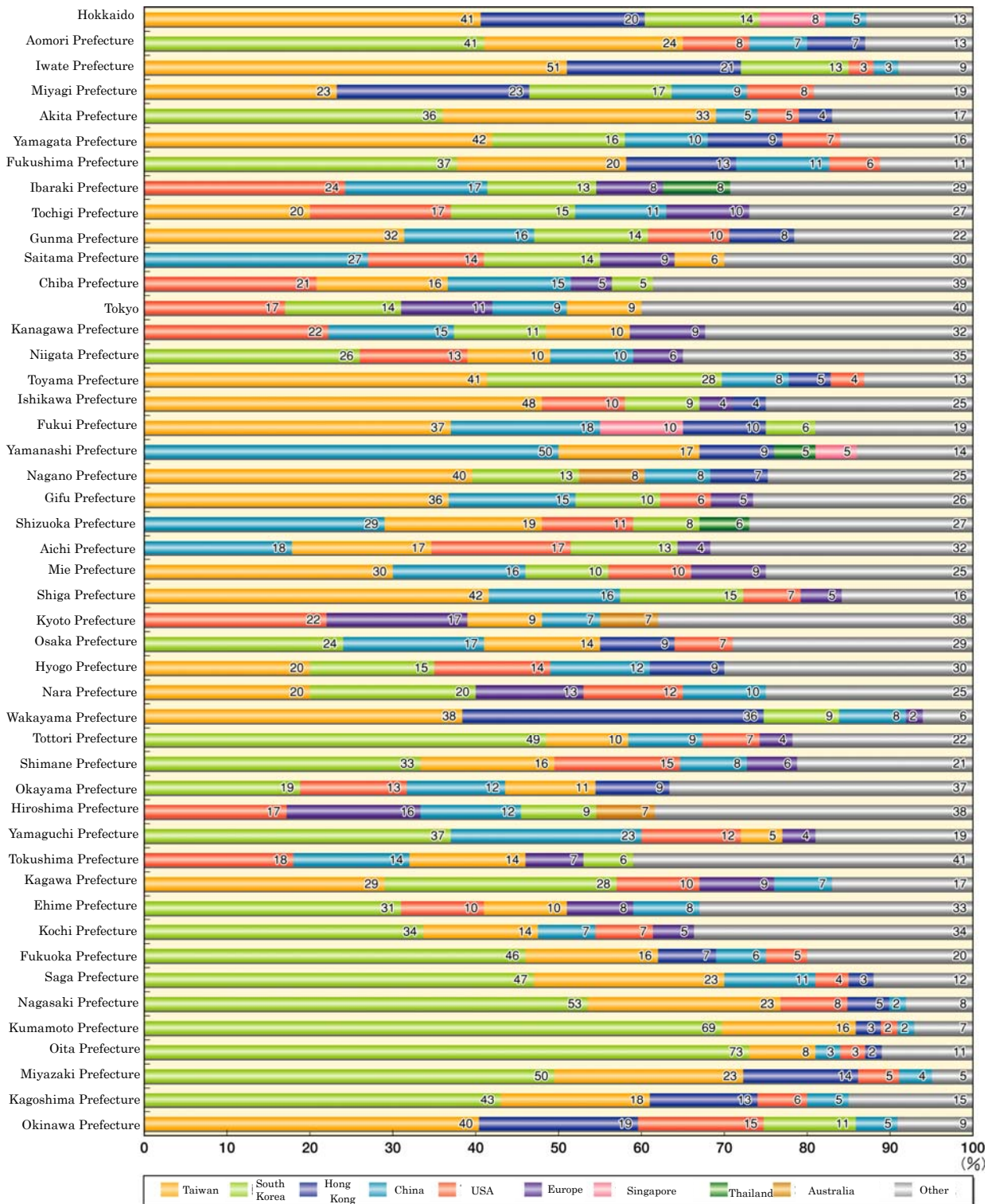
Note: Based on "Opinion Poll on Japanese People's Lives" conducted by the Governmental Public Relations Office, Minister's Secretariat, Cabinet Office, Government of Japan.

## Section 2 Trends in Foreign Tourists Visiting Japan

### 1. Trends in Foreign Tourists Visiting Japan with Accommodations

The findings of "Accommodation Survey" revealed that the total number of foreigners staying at lodging facilities from January through December 2008 reached 22.27 million. Moreover, the total number of foreigner tourists staying at lodging facilities by prefecture is reflected in the statistics below as expressed by their countries and regions in percentage. These statistics show that many people from Taiwan stayed at lodging facilities in Hokkaido and Hokuriku, many Americans visited the Tokyo metropolitan area and Kyoto, and many South Koreans came to visit Kyushu.

Percentages of the numbers of foreign tourists staying at lodging facilities by prefecture and by nationality (2008)



Notes:

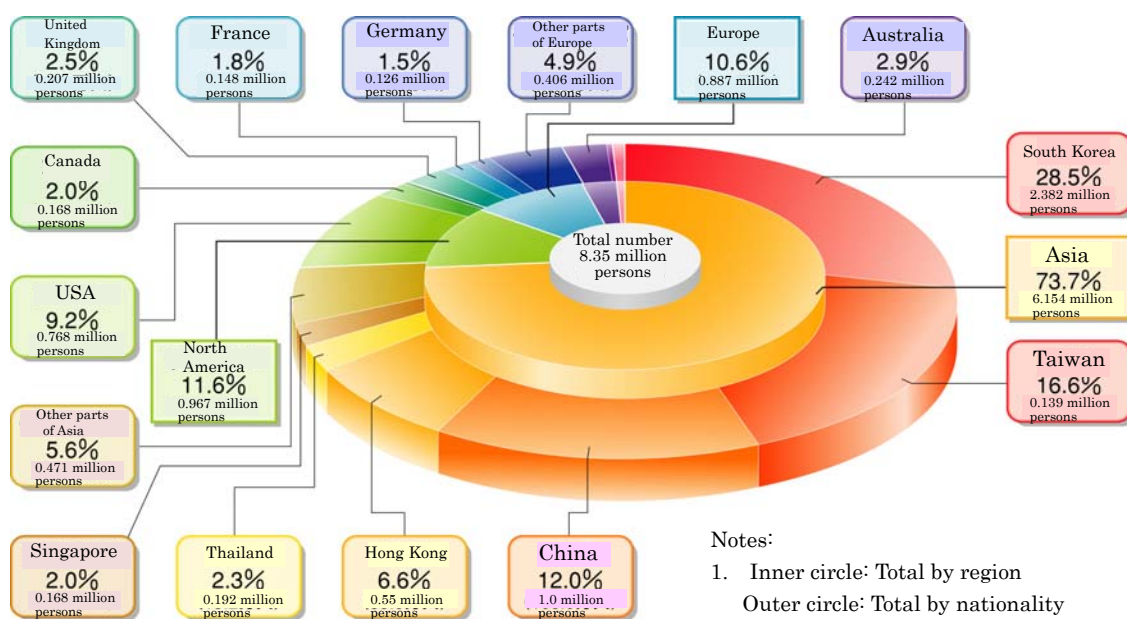
1. Based on "Accommodation Survey" issued by the Japan Tourism Agency, Ministry of Land, Infrastructure, Transport and Tourism.
2. "Foreigners" refer to those people not having a home address in Japan.
3. Europe refers to three countries: Germany, the United Kingdom and France.
4. The figures were obtained prior to the incorporation of annual statistics on new and obsolete facilities. The finalized values may show some changes.

## (2) Numbers of Tourists and Their Nationalities

The number of foreign tourists visiting Japan in 2008 reached 8.35 million (0.05% up from the preceding year), thereby achieving a record high despite adverse effects of the business recession caused by the worldwide financial crisis and the rapid appreciation of the yen during the latter half of the year.

The statistics compiled by region show that Asia accounts for 6.15 million visitors or 73.7%, followed by North America at 970,000 (11.6%), Europe at 890,000 (10.6%), and Oceania at 280,000 (3.3%).

Percentages of foreign tourists to Japan by region and nationality from the 12 top-ranking economies (2008)



Notes:

1. Inner circle: Total by region  
Outer circle: Total by nationality
2. Prepared by the Japan Tourism Agency based on documents compiled by the Ministry of Justice and the Japan National Tourism Organization (JNTO).



## 2. Trends in International Conventions

The number of international conferences held in Japan shows that Japan hosted 247 such conferences in 2003, thereby ranking top in Asia, but then dropping to 166 conferences hosted in 2006. However, the year 2007 saw a dramatic rise to 448 conferences, thereby boosting Japan to second place in Asia (and fifth worldwide).

The conventional statistical standards for international conferences were alleviated in 2007. However, when checking against the standards for the targets prescribed in the "Tourism Nation Promotion Plan," an estimated 216 international conferences were held in Japan during 2007.

### **Section 3 Economic Effects of Travel on Japan**

#### 1. Economic Effects in Fiscal 2007

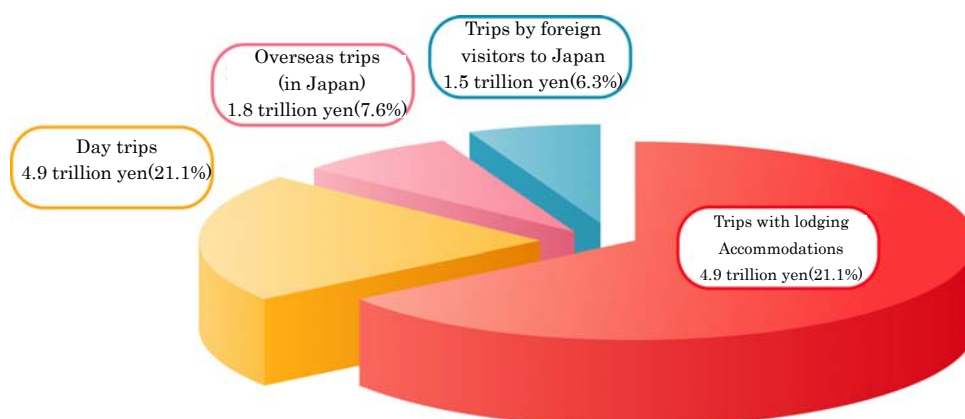
##### (1) Travel Consumption Today

The amounts of domestic travel consumption by the Japanese public in fiscal 2007 reached 15.3 trillion yen (down 2.5% from the preceding fiscal year) for overnight trips with accommodations, and 4.9 trillion yen (up 4.3% from the preceding fiscal year) for day trips.

In contrast, the amount of travel consumption by foreign visitors to Japan reached 1.5 trillion yen (up 8.7% from the preceding fiscal year before), thereby reflecting more foreign tourists visiting Japan.

The amount of domestic travel in Japan as the sum of all these forms of travel is estimated at 23.5 trillion yen (down 0.2% from the preceding fiscal year), almost holding steady from the last fiscal year.

Breakdown of the amount of domestic travel consumption of 23.5 trillion yen by market



Note: "National Tourism Survey" issued by the Japan Tourism Agency, Ministry of Land, Infrastructure, Transport and Tourism.

## (2) Economic Effects of Travel on Japan

The direct economic effects of the abovementioned amount of domestic travel consumption in fiscal 2007 (23.5 trillion yen) on the Japanese economy are estimated at 11.8 trillion yen for the direct effect of inducing added value, and 2.11 million persons for the effect of inducing employment.

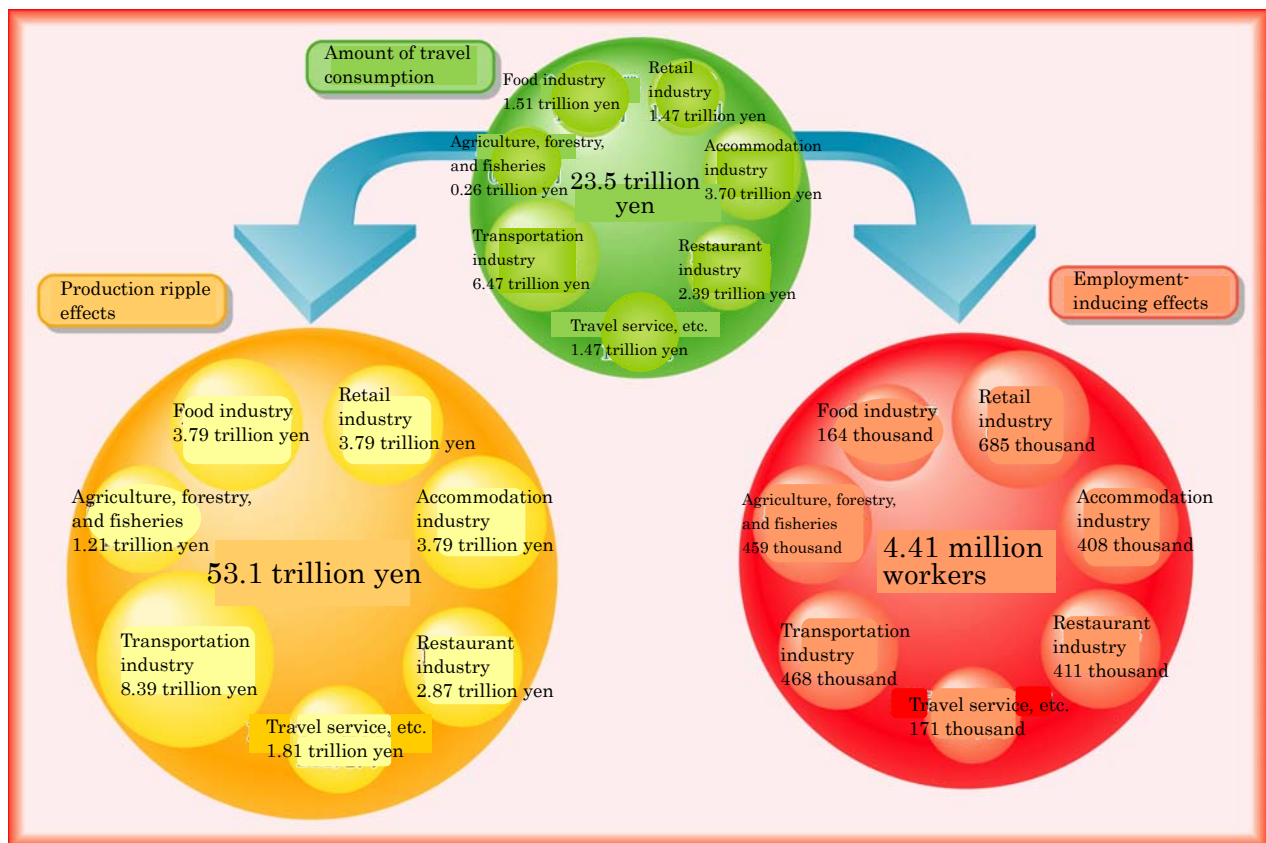
Moreover, the production ripple effects including the indirect effects produced by this travel consumption are estimated at 53.1 trillion yen (5.6% of the domestic product), while the effect of inducing added value is estimated at 28.5 trillion yen [5.5% of the gross domestic product (nominal GDP)], and the effect of inducing employment at 4.41 million persons (6.9% of all persons employed).

## (3) Economic effects of travel on the Japanese economy

Travel consumption in Japan has a direct economic effect on industries related to travel and tourism, while employees in those industries stimulate household consumption, thereby producing production ripple effects on wide-ranging domestic industries.



## Economic effects by industry (fiscal 2007)



Note: Based on "Survey VII of the Economic Effects of the Travel and Tourism Industry" issued by the Ministry of Land, Infrastructure, Transport and Tourism.

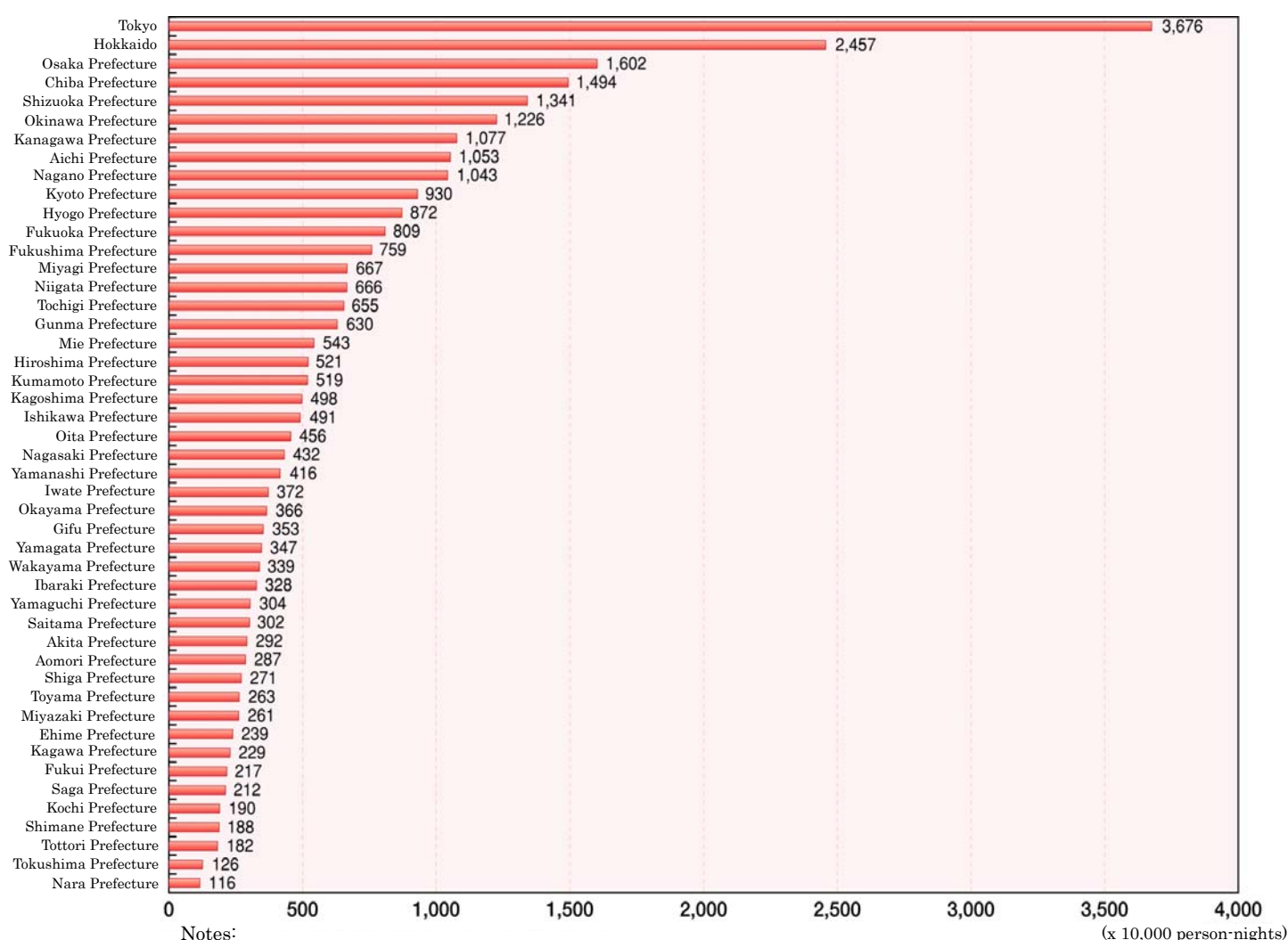
### Section 4 Status of Tourism in Prefectures as Viewed from Accommodation Survey

#### 1. Number of People Staying at Lodging Accommodations Today

##### (1) Total Number of People Staying at Lodging Accommodations by Prefecture

The total numbers of people staying at lodging facilities by prefecture in 2008 indicate that Tokyo ranked first with 36.76 million people staying there (12.0%), followed by Hokkaido accounting for 24.57 million people (8.0%) and third-ranking Osaka accounting for 16.02 million people (5.2%). These top-three destinations collectively accounted for about one-fourth of the total.

Total numbers of people staying at lodging facilities by prefecture (2008)



## Section 5 Trends in Global Tourism

The World Tourism Organization (UNWTO) estimates the total number of tourists from abroad received in all countries in 2007 at 903.29 million (up 6.6% from the preceding year) and the total amount of revenue from international tourism in all countries at 856 billion US dollars (15.4% up from the preceding year), thereby reflecting a dramatic rise as a continuation of the preceding year and marking a record high.

Particularly notable is the Asia-Pacific region. Although it accounts for a smaller share than the European region, this region has received more tourists from overseas

(up 10.4% from the preceding year), largely surpassing the average of the entire world (up 6.6% from the preceding year), and that of the European region (up 4.8% from the preceding year). During the past several years, this region has become a more popular destination of international sightseeing trips. Therefore, this affords Japan a good opportunity to make itself a tourism nation by attracting international tourists visiting neighboring countries.

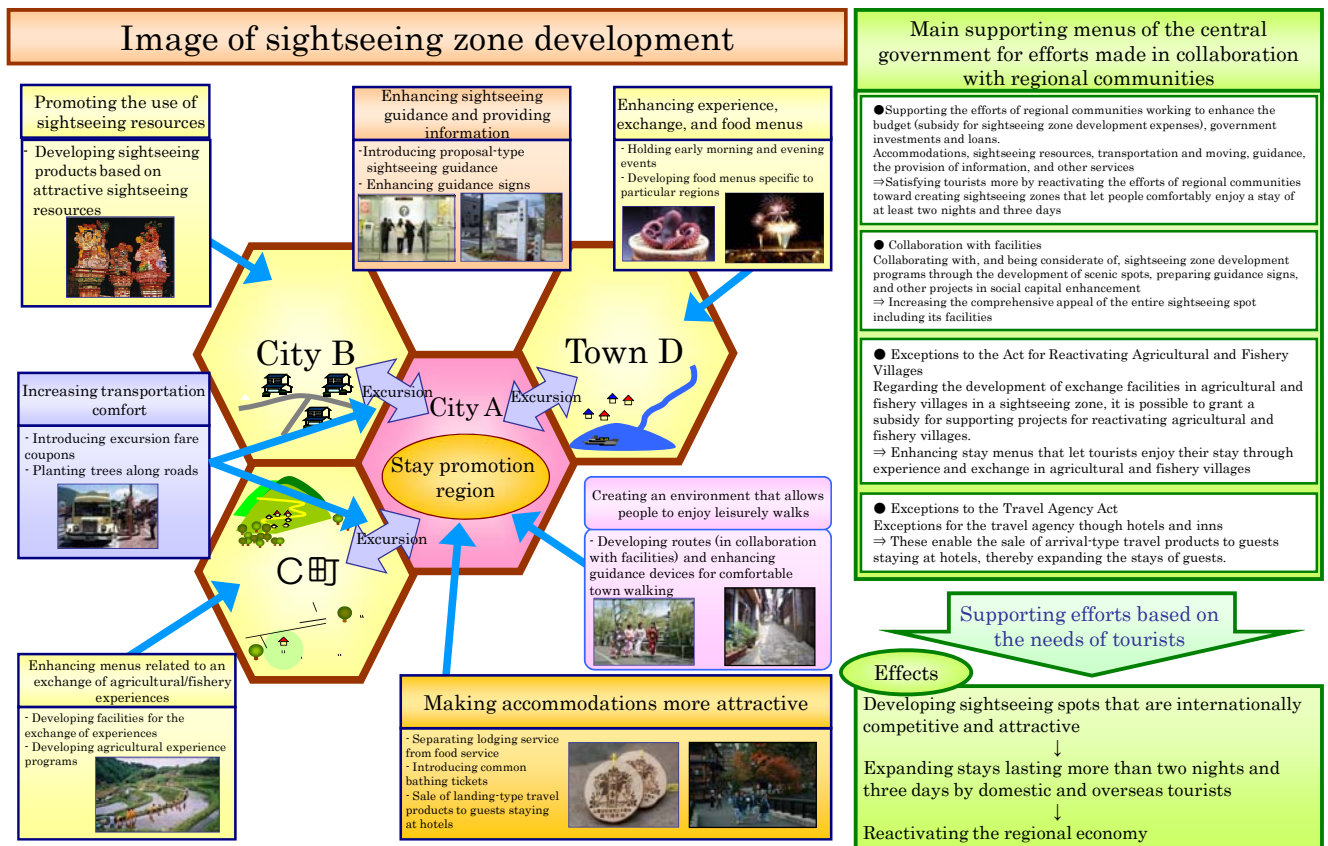
## Chapter 2 Developing Internationally Competitive and Attractive Sightseeing Spots

### **Section 1 Developing Internationally Competitive and Attractive Sightseeing Spots**

1. Securing high-quality service by taking advantage of a sightseeing spot's characteristics in collaboration with local governments, tourism agencies and other stakeholders

(1) The aim was to collaborate with a wide range of local stakeholders and promote the development of sightseeing areas that allow people to enjoy sightseeing with an overnight stay of at least two nights. As per the "Act concerning Promoting the Visit and Stay of Sightseeing Tourists by Arranging Sightseeing Zones" established on May 16, 2008, sightseeing zone development plans for 16 regions were approved in fiscal 2008, along with implementation of the "sightseeing zone development subsidy program" designed to assist the efforts of private organizations in a one-unit and comprehensive manner, and the selection of 14 regions as targets.

## Prolonged stay of tourists through sightseeing zone development



(2) A "sightseeing region producer" model program is implemented. This program consists of training and selecting personnel capable of planning, deploying and otherwise arranging efforts to build up a sightseeing region, thereby bringing the effects of attracting customers back to the regional community, thereby building a bridge to the regional community.

(3) Advice concerning the creation of sightseeing towns is given by the "Sightseeing Town Creation Advisory Conference" comprised of sightseeing VIPs, knowledgeable persons, travel agencies, and other stakeholders for each regional bloc.

2. Developing lodging facilities, food facilities, guidance facilities, and other travel-related and public facilities

(1) Public loans and tax incentives are provided to help develop hotels and inns.

(2) A town creation subsidy was provided to assist diverse projects ranging from those related to facilities to those related to services.

(3) The programs deployed include the creation of towns with personality, the repair of housing and other facilities in appearance, the burying of cables underground, and the development of roads, parks and other district facilities, important scenic structures and other town environmental components, roads with consideration given to the appearance of towns, and other travel-related and public facilities.

## **Section 2 Developing Attractive Sightseeing Spots Based on Regional Community Characteristics by Using Sightseeing Resources**

1. Efforts are being made to protect national treasures, important cultural assets and other cultural assets, along with the world's cultural heritage sites, and to promote the national trust campaign.

2. Efforts include preservation of the historic climate in Kyoto and other old capitals, the development of state-run historic parks at the Asuka and Heijokyu ruins, the Heijokyu ruins zone and other national parks, and the protection, cultivation and development of sightseeing resources related to a historic background.

3. Efforts include the protection, cultivation and development of sightseeing resources related to national and quasi-national parks, world natural heritage sites, and other natural scenic spots.

4. Efforts include support for efforts centering on the preservation and use of important scenic structures and trees as per the Scenic Spots Act through comprehensive support programs for developing scenic spots, along with the protection, cultivation and development of other sightseeing resources related to good scenic spots.

5. Efforts under way include the protection, cultivation and development of sightseeing resources related to hot springs, as well as other aspects of culture and industry.

## **Section 3 Comprehensive Development of Transportation Facilities Necessary for Protecting the Visit of Sightseeing Tourists**

Efforts under way include further developing Narita International Airport, other means of international transport, Shinkansen, super expressways, and other facilities.

Moreover, to promote tourism in regional communities and for other purposes, such discounts as a 50% all-day discount (with the upper limit being 1,000 yen) are being offered on holidays in local areas for super expressway fares.

### Chapter 3 Training Personnel to Contribute to Making the Sightseeing Industry Internationally Competitive and Promoting Tourism

#### **Section 1 Making the Sightseeing Industry Internationally Competitive**

1. To promote the spread and establishment of management that emphasizes customer satisfaction within the sightseeing industry, a survey was conducted to gauge the satisfaction of domestic tourists by investigating their psychological states before, during, and after their trips. The findings were then tabulated and analyzed.

2. To make the sightseeing industry internationally competitive, six demonstrative programs were adopted, including the expansion of off-season guest cabin distribution and the standardization of notification formats for preserving information about lodging facilities. Challenges to be addressed in spreading and disseminating the know-how about such matters were then identified and the problems organized.

#### **Section 2 Training Personnel to Help Promote Tourism**

1. Enhancing Higher Learning to Help Make Sightseeing Spots and the Sightseeing Industry More Internationally Competitive

(1) Enhancing Higher Learning Institutions through Collaboration of Industry, Academia, and Government

In training tourism workers, the "Curriculum Working Group" was established in November 2008 to confirm the need to provide tourism management education, and to analyze and consider the curricula of existing tourism-related colleges.

April 2008 saw tourism-related faculties and departments at Wakayama University, University of the Ryukyus, North Asia University, Osaka Gakuin University, Kobe Kaisei College, Kurashiki University of Science and the Arts, and other institutions of higher learning. This increased the enrollment limit of tourism-related faculties and departments to 4,800 students (at 39 colleges). In fact, there has been an increase of 2,232 students over the past five years. Moreover, there were 11,753 students in the 168 travel-related departments of vocational colleges as of May 2008.

## 2. Increasing the Knowledge and Abilities of Tourism Workers

### (1) Stepping up Tourism Management

To train personnel in the business management of hotels, inns and other establishments, and in regional management, efforts are under way to support the development of programs for training executives and develop programs for training experts in managing scenic spots.

Moreover, a study was conducted on the institutions, mechanisms and other factors that may enhance the abilities of workers at hotels and inns. Seminars were also conducted for tourism workers in 10 cities nationwide that are enthusiastic about receiving foreign travelers visiting Japan, while a manual was prepared incorporating case studies of foreign travelers visiting Japan and other information.

### (2) Holding a Tourism VIP Seminar

A "Tourism VIP Seminar" was held in eight regions. This seminar is intended to train personnel in charge of promoting regional tourism.

## 3. Promoting the Dissemination of Cultural/Historic Knowledge and Other Matters Peculiar to the Regional Community

The "Symposium for Training Personnel for Creating Sightseeing Regions" held in June presented case studies of volunteer guide activities conducted by local students. At the same time, model programs were implemented in four regions: Matsumae-cho

(Hokkaido), Hachinohe-shi (Aomori Prefecture), Kohoku-cho (Shiga Prefecture), and Kagoshima-shi (Kagoshima Prefecture). In so doing, efforts were made to enhance education in the schools regarding the culture, history and other matters peculiar to the regional community.

#### Chapter 4 Promoting International Tourism



The logo "Yokoso! Japan"

#### **Section 1 Promoting the Visit of Foreign Tourists**

##### 1. Emphasized and Effective Dissemination of Japan's Appeal as a Set of Sightseeing Spots

###### (1) Overseas Dissemination of Japan's Appeal as a Set of Sightseeing Spots

###### 1) Outline of the "Visit Japan Campaign"

To promote mutual understanding through interpersonal exchange completes the diplomacy between nations, thereby significantly contributing to security. Moreover, in response to our declining birthrate and rapidly aging society with fewer children, as well as the economic development of neighboring countries, it is necessary to promote exchange through tourism, contribute to regional reactivation, and boost domestic business by receiving foreign tourists.

Based on these considerations, since 2003 we have been disseminating Japan's appeal as a set of sightseeing spots under the logo and catchphrase "Yokoso! Japan," as well as promoting efforts of the Visit Japan Campaign in supporting the preparation of attractive travel products for visitors to Japan in collaboration with the government and general public. The number of foreign travelers visiting Japan, which totaled 5.21 million in 2003, jumped to 8,351,000 in 2008.

###### 2) Visit Japan Campaign program

The 12 economies from which most foreign tourists visit Japan (South Korea, Taiwan, China, Hong Kong, Thailand, Singapore, USA, Canada, United Kingdom, Germany, France, and Australia) are designated important markets. Moreover, based on the



characteristics of these markets, these important markets are provided with enterprises for promoting visits to Japan by their citizens.

In fiscal 2007, India, Russia and Malaysia were designated promising newly emerging markets following the important markets noted above. Strategic market research was then conducted to facilitate efforts toward effective promotion.



Japan Pavilion at the Travel Trade Fair in Singapore (NATAS)

Programs to promote the visit of foreign tourists to Japan include inviting overseas mass media reporters to Japan, supporting their research, promoting publicity and advertising through TVCM overseas and other media, disseminating information on Websites, and displaying exhibits at travel exhibitions and other occasions overseas, thereby increasing popular interest in Japan as a sightseeing destination and fueling popular demand for visits to Japan. At the same time, efforts should include inviting overseas travel agencies to Japan and holding business talks, thereby preparing and supporting the sales of attractive travel products for visitors to Japan, and attracting educational trips to Japan in order to expand the exchange among young people.

## (2) Collaborating with the Japan Brand Strategy

According to the "Intellectual Property Promotion Plan 2008" (announced on June 18, 2008, and formulated by Intellectual Property Strategy Headquarters), industries related to content, food, fashion and design were positioned as "soft power industries." To proceed with the promotion and overseas deployment of these industries, the "Japan Brand Strategy" (tentative name) was drafted in March 2009. That strategy seeks to step up collaboration and other efforts with the Visit Japan Campaign.

## (3) Efforts to Promote Tourism with the Hokkaido Toya Lake Summit as the Turning Point

The "Hokkaido Toya Lake Summit" was held July 7-9, 2008. With that event as the turning point, efforts were then made to establish the Hokkaido brand, improve the treatment of visitors, and disseminate appropriate information in an attempt to promote tourism.

#### (4) Disseminating Information and Other Activities by the Japan National Tourism Organization (JNTO)

The Japan National Tourism Organization (JNTO) has 13 overseas offices. It engages in wide-ranging activities including public relations and publicity regarding Japan's appeal as a set of sightseeing spots, preparation and support for the sales of travel products by local travel agencies to foreign visitors, and consultations for local governments and private corporations in Japan that engage in overseas sales. The organization's main mission is to contribute to the Visit Japan Campaign and conduct vigorous activities toward increasing the number of foreign tourists to Japan. It also runs a portal Website that provides travel information in nine languages on visiting Japan.

#### (5) Disseminating the Appeal of Regional Communities and Other Activities

The local transport bureaus and other agencies collaborate with local governments to conduct local collaboration programs for the Visit Japan Campaign.

(6) Other efforts made include promoting sightseeing by using the official residences of ambassadors and consuls general and other establishments, promoting the dissemination of cultural information by artists, intellectuals and other knowledgeable persons, disseminating information overseas about Japanese foods, foodstuffs and other items, disseminating information about pop culture, disseminating and networking information about Japanese content, and further disseminating information through international broadcasts.

## 2. Providing Information about Expenses Required for Domestic Transportation, Accommodations, and Other Sightseeing Trips

### (1) Providing Information about Travel Expenses

To dispel the image of Japan as a country of expensive commodities, we compared the commodity prices between Japan and other countries, prepared an "Affordable Japan" brochure that presents price information about restaurants, coffee shops, bars, accommodations and other facilities, and then distributed copies of it overseas.

## (2) Promoting Measures for the Operators of Public Transport and Similar Establishments to Provide Information

As per the "Act for Facilitating Non-Japanese Travel", the operators of public transport and other establishments (249 operators as of April 2008) are conducting programs for measures to provide information about the sections frequently used by many foreign tourists in foreign languages.

## 3. Promoting the Attracting of International Conferences and Other International-Scale Events

At meetings attended by bureau managers and persons of similar rank in charge of expanding the sponsoring and attracting of international conferences, "a program for expanding international exchange by promoting the sponsoring and attracting of international conferences" was established for this purpose on a national scale. As a result, the number of international conferences held in Japan jumped from 166 in 2006 to 448 in 2007, thereby ranking second in Asia (and fifth worldwide). One reason for this success is the recent easing of statistical standards for international conferences.

However, according to standards for the targets prescribed in the "Tourism Nation Promotion Plan," the actual number of international conferences held in Japan in 2007 is estimated at 216. Active efforts should therefore be continued to attract international conferences.

## 4. Improving Measures concerning Foreign Tourists Leaving and Entering Japan, Improving Interpreter Guidance Service, and Securing Other Resources for Receiving Foreign Tourists

### (1) Speeding up and Facilitating the Visa Issuance Procedure

Efforts are being made to facilitate the issuing of visas to visit Japan, such as by issuing visas within five working days after application. Moreover, 62 economies are exempt from the tourist visa requirement.

China saw about 351,000 group tourist visas issued in 2008, up about 34% from the preceding year. Moreover, it was decided that visas would be issued to families of

sufficient financial means beginning in March 2008.

Efforts will be continued to further facilitate the issuing of visas and prevent illegal stays, terrorist attacks, and other unlawful activities.

#### (2) Speeding up and Smoothing the Exit and Entry Procedures

Efforts were made to ensure the effective use of "advance confirmation (pre-clearance)," "secondary examination," the "advance passenger information system (APIS)" and other facilities, and to conduct onboard inspections of large inbound passenger ships prior to arrival at port, thereby speeding up and smoothing the exit and entry procedures. Moreover, the quarantine stations employ thermography and other facilities to screen tourists entering Japan from countries where victims of bird flu have been reported, in an attempt to speed up the formalities.

(3) Efforts are being made to arrange tourist information centers for foreign tourists, enhance the tourist guide/interpreter program, deploy more volunteer guides, and conduct other activities.

(4) Promotion is undertaken in response to foreigners visiting museums, national theaters, national parks, and other facilities.

## **Section 2 Promoting Mutual International Exchange**

### 1. Promoting Cooperation with Other National Governments

(1) Stepping up Tripartite Exchange of Sightseeing and Cooperation between Japan, China and South Korea

In June 2008, the third Tourism Ministers Meeting involving China, Japan and South Korea was held in Busan, South Korea. The meeting adopted the "Busan Declaration for Promoting the Exchange of Tourism and Cooperation between Japan, China and South Korea" that prescribes the need to promote a tripartite exchange of tourism and steps up cooperation between Japan, China and South Korea.

(2) Promoting Bilateral Efforts for Exchange of Tourism

### 1) Promoting Exchange of Tourism between Japan and South Korea

In 2008—defined as the "Year of Japan-South Korea Tourism Exchange"—efforts were made to promote the exchange of tourism through youth exchange programs, municipality exchange programs, and international tourism expositions, including the "Evening of Exchange in Japan-South Korea Tourism" held in Seoul in April that year.

### 2) Initiating the Family Tourist Visa Program in China

The number of Chinese tourists using the group visa program for visiting Japan is growing steadily. Moreover, in March 2008, family tourist visas were first issued to families with two to four members visiting Japan.

### 3) Program Commemorating the Year of Japan-France Tourism Exchange

The year 2008 also marked the 150th anniversary of the Treaty of Amity and Commerce established between France and Japan. Positioned as the "Year of Japan-France Tourism Exchange," 2008 saw active deployment of the exchange programs between both nations including the "Opening Seminar for the Year of Japan-France Tourism Exchange" held in April that year, the coauthors of the guidebook to Japan in the Michelin guide series being invited to Japan in May, and in October the "Seminar for Promoting the Tourism Regions for the Year of Japan-France Tourism Exchange" being held in Paris, where Japan's appeal as a set of sightseeing spots was promoted through public relations.



Wraparound ad on a sightseeing bus in Paris

(2) Japan also cooperated in promoting international tourism by cooperating with the World Tourism Organization (UNWTO) and the Organization for Economic Co-operation and Development (OECD), along with promoting tourism in developing countries and other regions.

## 2. Promoting Interregional Exchange between Japan and Other Nations

### (1) Promoting Overseas Travel by the Japanese Public

In line with the further deregulation of rules governing international chartered flights (comprehensive travel charter), the way has been paved in order to respond to various tourist needs, by such means as expanding international chartered flights at local airports.

### (2) Using Sister City and Friendly City Tie-ups

Exchange programs for sister cities and friendly cities are conducted through local tie-up programs for the Visit Japan Campaign.

## 3. Promoting International Exchange among Young People

### (1) Promoting Educational Trips to Japan

The "National Convention for Promoting Educational Trips to Japan," an organization run in cooperation with the government and general public, promotes efforts to attract educational trips to Japan.

### (2) Promoting Exchange with Young People Overseas

Young people in other countries are invited to Japan through various exchange programs. Particularly notable was the "21st Century East Asia Youth Grand Exchange Plan," which invited a total of 8,300 young people from East Asian countries in fiscal 2008.

## Chapter 5 Paving the Way for Promoting Sightseeing Trips

### **Section 1 Facilitating and Smoothing Sightseeing Trips**

#### 1. Promoting the Use of Vacation Days

To promote the use of vacation days, thereby fueling and leveling the demand for domestic travel, we held the "Committee of Knowledgeable Persons concerning Promotion of Taking Paid Holidays." The committee studied the advantages of using vacation days, prepared a collection of case studies summarizing the efforts of private corporations concerning the use of vacation days, conducted a demonstrative experiment that will help create and level the demand for trips taken with infants and toddlers, compiled a committee proposal, and then proceeded with dissemination activities through symposiums and seminars held in March 2009.

## 2. Alleviating the Concentrated Demand for Sightseeing Trips in Certain Seasons

Efforts are under way to diversify and add flexibility to the vacation days of elementary and junior high schools, including the setting of holidays that take advantage of regional characteristics, autumn holidays and the two-semester system, and school holidays interlinked with regional events and festivities.

The Tourism Industry Association of Japan conducted the "One-week Vacation Campaign."

## 3. Protecting Tourism-related Consumer Profits

In fiscal 2008, travel agencies were instructed to give indications and provide labels easy for tourists to understand, by such means as indicating fuel surcharges and other travel prices on ads and in contractual documents.

Moreover, thorough instructions were given regarding the need to ensure safety on chartered buses and to observe related laws.

4. Efforts were made to promote public understanding of the significance of tourism by such means as implementing "Tourism Week," "Travel Fair 2008," and "JATA World Travel Exposition 2008."

## **Section 2 Improving the Treatment of Tourists**

### 1. Arranging travel-related facilities

A demonstrative experiment—the Town Cruising Navigation Project—was conducted in 20 regions nationwide. This experiment involved spreading and disseminating the "Guidelines for Tourism-reactivating Guidelines," and enhancing the provision of information to tourists along roads and other means, thereby supporting the travel of tourists.

2. Stepping up the presentation of Japanese cuisine and other aspects of life culture, industry, and other aspects of Japan's long tradition and development of attractive products that take advantage of Japan's national or regional characteristics

Regional brands were promoted by such means as conducting the "VJC Contest of Japanese Attractive Souvenirs 2009."

### Section 3 Promoting Convenience for Tourists

1. Arranging travel-related facilities and other forms of convenience readily accessible by the elderly, persons with disabilities, foreigners, and other tourists requiring particular care, and enhancing convenience for them

(1) Efforts were made to promote greater accessibility to travel-related facilities and other forms of convenience to the elderly and persons with disabilities. A collection of guides was also drafted to establish tourism based on the concept of universal design in order to spread and disseminate that concept.

(2) Efforts being made include promoting the introduction of a "bus location system" and other means of enhancing the convenience of buses, expanding the areas of providing information for the Vehicle Information and Communication System (VICS), and otherwise smoothening road traffic.

2. Efforts being made include providing an electronic land-based Web system, introducing a parking lot guidance system that provides information about parking spaces and vacancy status, and providing other tourism information by using telecommunications technology.

### Section 4 Ensuring Safety on Sightseeing Trips



1. The provision of meteorological information was promoted, along with the reporting of disaster-prone areas, refuge centers, escape routes and other facilities, and the providing of information about the occurrence of accidents, disasters and other incidents at sightseeing spots both at home and abroad.
2. Efforts were made to prevent the occurrence of accidents on sightseeing trips by such means as taking safety measures regarding the means of public transport, road and marine transport, and lodging facilities, and responding to and taking safety measures against accidents and incidents overseas.

### **Section 5 Exploring New Fields of Sightseeing Trips**

To support the efforts related to green tourism, eco-tourism and "new tourism" linked closely to specific communities, travel agencies, knowledgeable persons, and other specialists at each transport bureau provided consultation, along with support for conducting monitor tours. Manuals and collections of case studies were then prepared to summarize considerations that must be noted in proceeding with the commercialization of travel products. "New tourism" was spread and disseminated by such means as holding seminars for tourism stakeholders and other personnel.

### **Section 6 Preserving the Environment and Natural Scenery at Sightseeing Spots**

Efforts are under way to preserve the environment of sightseeing spots, promote enforcement of the Scenic Spots Law, spread and disseminate the basic philosophy, enhance programs related to outdoor ads at sightseeing spots, and provide support in building communities that take advantage of their history, culture and climate, in order to preserve the attractive natural scenery of sightseeing spots.

### **Section 7 Arranging Sightseeing Statistics**

For "Accommodation Survey," survey items that determine the average number of overnight stays per capita were added with the numbers of nights stayed in each municipality being published beginning with the 2008 survey. It has been decided that, from now on, further efforts will be made by such means as adding survey items that determine the percentage of occupied guest rooms, while the survey findings will be

analyzed with consideration given to their subsequent use.

Moreover, a test survey was conducted in the prefectures of Niigata and Okayama on statistics about tourists on day trips and other tourists for drafting common criteria that can be adopted by local public entities, based on the "Principles of Statistics of Tourists Received and Amounts of Tourism Consumption" compiled by the Round-Table Talks for Arranging Tourism Statistics in fiscal 2008. These efforts will be continued in fiscal 2009 by expanding the scope of testing and drafting common criteria toward the implementation thereof after fiscal 2010.

Moreover, a survey and study are being conducted on the methods of preparation and other matters in order to enable an accurate comparison of the economic effects of tourism among different nations toward full-scale introduction of the "Tourism Satellite Account (TSA)" in 2010 now being introduced in various countries.

## Sightseeing Measures in Fiscal 2009

### Chapter 1 Forming Internationally Competitive and Attractive Sightseeing Spots

#### **Section 1 Forming Internationally Competitive and Attractive Sightseeing Spots**

1. Securing the provision of good service based on the characteristics of sightseeing spots in collaboration with local public entities, tourism operators and other stakeholders

(1) "Programs concerning the enhancement and improvement of services for the accommodation of tourists" in different regions that help form sightseeing zones are positioned as an important field to actively support the preparation of arrival-type travel products in compliance with the Travel Agency Act.

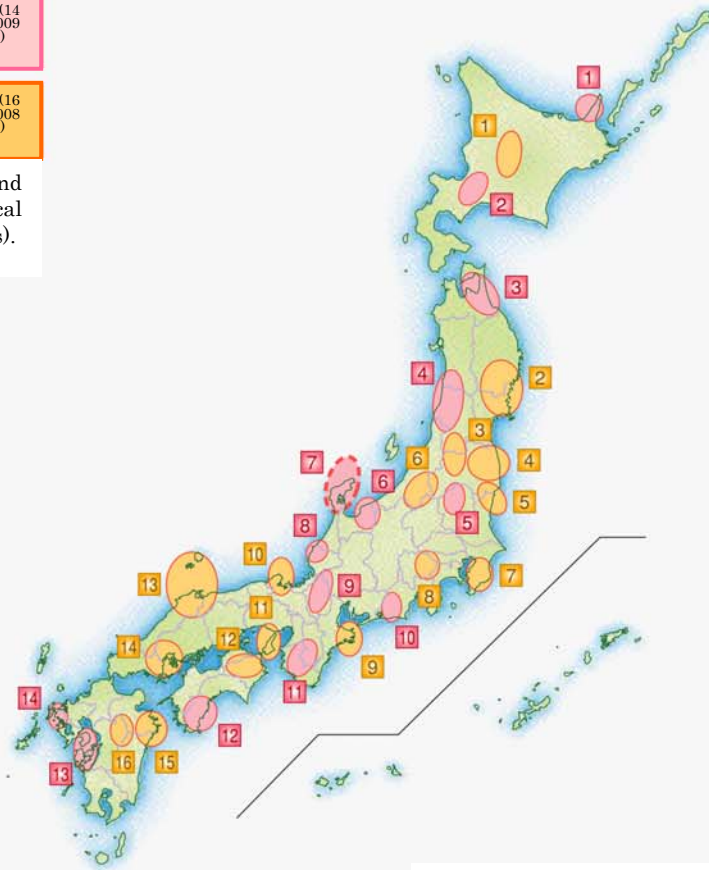
Excellent case studies are also selected and presented to provide material for creating internationally competitive and attractive sightseeing spots.

Table of sightseeing zones (30 regions)

Names of sightseeing zones (14 regions) certified in fiscal 2009 (names of the target municipalities)

Names of sightseeing zones (16 regions) certified in fiscal 2008 (names of the target municipalities)

Note: Of which    and    are under the fiscal 2009 subsidy (29 regions).



- |   |  |
|---|--|
| <span style="background-color: #FFC0CB; border: 1px solid black; padding: 2px;">1</span> Shiretoko Sightseeing Zone   | <span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">1</span> Furano Biei Wide Sightseeing Zone                                   |
| <span style="background-color: #FFC0CB; border: 1px solid black; padding: 2px;">2</span> Sapporo Wide Sightseeing Zone  | <span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">2</span> Date Wide Sightseeing Zone  |
| <span style="background-color: #FFC0CB; border: 1px solid black; padding: 2px;">3</span> New Travel in Aomori, Lake Towada Wide Sightseeing Zone                          | <span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">3</span> Aizu and Yonezawa Region Sightseeing Zone                           |
| <span style="background-color: #FFC0CB; border: 1px solid black; padding: 2px;">4</span> Sea of Japan Kira Kira Uetsu Sightseeing Zone                                    | <span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">4</span> Fukushima Sightseeing Zone with the Tenderness and Warmth of Nature |
| <span style="background-color: #FFC0CB; border: 1px solid black; padding: 2px;">5</span> Nikko Sightseeing Zone   | <span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">5</span> Mito Hitachi Sightseeing Zone -- Your Sky and Earth                 |
| <span style="background-color: #FFC0CB; border: 1px solid black; padding: 2px;">6</span> Toyama Bay, Kurobe Canyon, Etchu Niikawa Sightseeing Zone                        | <span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">6</span> Yukiguni Sightseeing Zone   |
| <span style="background-color: #FFC0CB; border: 1px solid black; padding: 2px;">7</span> Noto Peninsula Sightseeing Zone  | <span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">7</span> Minami Boso Region Sightseeing Zone                                 |
| <span style="background-color: #FFC0CB; border: 1px solid black; padding: 2px;">8</span> Fukui Sakai Wide Sightseeing Zone  | <span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">8</span> Mt. Fuji and Fuji Five Lakes Sightseeing Zone                       |
| <span style="background-color: #FFC0CB; border: 1px solid black; padding: 2px;">9</span> Lake Biwa, Omiji Sightseeing Zone  | <span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">9</span> Ise Shima Region Sightseeing Zone                                   |
| <span style="background-color: #FFC0CB; border: 1px solid black; padding: 2px;">10</span> Lake Hamana Sightseeing Zone  | <span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">10</span> Kyoto Prefecture Tango Sightseeing Zone                            |
| <span style="background-color: #FFC0CB; border: 1px solid black; padding: 2px;">11</span> Sightseeing Zone of Healing and Resuscitation with Sanctuary Kumano as Its Core | <span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">11</span> Awaji Island Sightseeing Zone                                      |
| <span style="background-color: #FFC0CB; border: 1px solid black; padding: 2px;">12</span> Shimanto and Ashizuri Area (Hata District) Sightseeing Zone                     | <span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">12</span> Nishi Awa Sightseeing Zone   |
| <span style="background-color: #FFC0CB; border: 1px solid black; padding: 2px;">13</span> Unzen Amakusa Sightseeing Zone  | <span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">13</span> San'in Cultural Sightseeing Zone                                   |
| <span style="background-color: #FFC0CB; border: 1px solid black; padding: 2px;">14</span> Hirato, Sasebo, Saikai Long Stay Sightseeing Zone                               | <span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">14</span> Hiroshima, Miyajima, and Iwakuni Region Sightseeing Zone           |
|   | <span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">15</span> New East Kyushu Sightseeing Zone                                   |
|   | <span style="background-color: #FFD700; border: 1px solid black; padding: 2px;">16</span> Shiretoko Sightseeing Zone Aso Kuju Sightseeing Zone               |

(2) The "program for supporting wide-range comprehensive sightseeing customer-attracting service" is conducted to support community-wide efforts that use the community's characteristic industries and other resources as sightseeing and customer-attracting resources.

(3) For the districts specifically designated for structural reforms and regional renewal, efforts for promoting tourism are given active support and advice.

2. Arranging lodging facilities, food facilities, guidance facilities, and other travel-related facilities and public facilities

(1) The Japan Finance Corporation (in charge of affairs designed for the general public) and the Okinawa Development Finance Corporation take measures allowing the granting of loans at low interest rates for plant investments made by hotel owners in the stay promotion district as per the sightseeing zone development plan approved by the Minister of Land, Infrastructure, Transport and Tourism.

(2) A new plan for eliminating electric poles (fiscal 2009-2014) will be drafted to concentrate efforts on eliminating electric poles in districts where it is urgently necessary to preserve the trunk roads and historic streets in cities.

## **Section 2 Forming Sightseeing Spots Based on Regional Characteristics by Using Sightseeing Resources**

1. Protecting, cultivating and developing sightseeing resources related to cultural assets

Efforts are being made to promote the preservation and use of cultural assets, and support the national trust campaign.

2. Protecting, cultivating and developing sightseeing resources concerning places with excellent natural scenery

Efforts will be made to promote awareness of environmental protection, protect and use national and quasi-national parks, and properly preserve and control areas with world natural heritage sites.

3. Protecting, cultivating and developing sightseeing resources concerning hot springs,

other cultural aspects, industry, and other aspects

A "survey for promoting regional renewal for island building" will be conducted in an attempt to use regional traditional performing arts and entertainment, and promote tourism on isolated islands.

### **Section 3 Comprehensively arranging transportation facilities necessary for promoting visits by tourists**

Efforts will be made to arrange international key airports, super expressways, and other transportation facilities. Moreover, efforts will be made to expand the "comprehensive program for reactivating and renewing regional public transportation" and promote the creative voluntary efforts of regional communities.

## Chapter 2 Training Personnel to Help Make the Sightseeing Industry Internationally Competitive and to Promote Tourism

### **Section 1 Making the Sightseeing Industry Internationally Competitive**

Efforts to be made include a survey of the satisfaction of guests staying at lodging facilities in order to spread and establish management practices that emphasize customer satisfaction in the accommodations industry, while conducting a demonstrative program for increasing the availability of guest rooms and making tasks common and more efficient, and to increase the productivity of the sightseeing industry and its international competitiveness.

### **Section 2 Training Personnel To Help Promote Tourism**

Efforts to be made include implementing a model program based on the "draft curriculum for training personnel in charge of tourism management" and a study of the way working people ought to be educated. Moreover, a study will be conducted to review matching schedules and other programs concerning the internship model program, expand the number of participating corporations and colleges, and consider highly educational internships including "long-term internships." Efforts will also be made to increase the knowledge and abilities of tourism workers.

## Chapter 3 Promoting International Tourism

### **Section 1 Promoting the Visit of Foreign Tourists**

#### 1. Disseminating Japan's Appeal as a Set of Sightseeing Spots with Emphasis and Effect

(1) In 2010, efforts will continue being made to enhance the Visit Japan Campaign toward the goal of increasing the number of foreign tourists visiting Japan to 10 million. Specific efforts include increasing the satisfaction of foreign tourists visiting Japan to ensure that they later revisit Japan, further increasing Japan's appeal through the "Visit Japan Upgrade Project" with consideration given to post-2010 affairs, and increasing tourist convenience by such means as enabling and expanding the use of IC transportation passes and other devices in other countries.

(2) As per the "Japan brand strategy" (March 10, 2009), food culture, fashion, content, traditional culture, and other assets will be established in a cross-departmental manner as the Japanese brand and disseminated to the world. Toward that goal, efforts will be made in collaboration with the government and general public, by such means as collaborating with the Visit Japan Campaign.

(3) The Japan National Tourism Organization (JNTO) will introduce other regional attractions, present multi-language versions of map information urgently needed by tourists, and provide route guidance functions that use the means of transport and other facilities during travel, thereby providing further support for tourists who wish to walk around without being accompanied by a guide.

(4) Information about things Japanese will be disseminated more vigorously by such means as international broadcasts.

#### 2. Promoting the Attracting of International Conferences and Other International Events

In fiscal 2009, personnel will be trained for upgrading to international levels as pertaining to attracting activities and other activities, drafting models for estimating economic effects, and building a database.

Efforts made thus far have centered on attracting, promoting and holding international conferences. In response to the proposal made at the 13th Tourism Nation Promotion Strategic Conference held on March 13, 2009, measures to be taken from now will cover not only international conferences but also exhibitions, trade fairs, incentives, and other MICE (\*) in general. To promote these measures, a "Meeting on MICE-promoting Measures to Expand International Exchange" will be launched to discuss measures designed to make Japan more competitive in the various MICE fields and draft a mid-to-long-term strategy.

\* What is MICE?: This stands for Meetings of corporations and organizations, Incentive (travel) conducted by corporations for remuneration and training, Conventions on an international level, and Events/Exhibitions.

3. Improving the measures regarding the exit and entry of foreign tourists, improving guide/interpreter service, and ensuring other resources for receiving foreign tourists

(1) Access to international regular flights at regional airports and attracting chartered flights, along with other activities, are becoming more active. In response to that trend, efforts will be made to shorten the examination times at arrival by such means as "advance confirmation (pre-clearance)," "secondary examination," and the "advance passenger information system (APIS)." Moreover, large inbound passenger ships are subject to onboard inspections before arrival at the nearest port to step up efforts to curtail the waiting time for landing examination at the port of arrival.

(2) Based on an exchange of opinions at the "Round-Table Talks about How Certified Guides/Interpreters Ought to Be," meetings will be held in the presence of knowledgeable persons to consider the way certified guides/interpreters ought to be.

## **Section 2 Promoting Mutual International Exchange**

1. Promoting Cooperation with Other National Governments

(1) In October 2009, the fourth meeting of the Japanese, Chinese and South Korean ministers of tourism is scheduled to be held in central Japan. Efforts will be continued to step up efforts for a tripartite exchange of tourism and greater cooperation between Japan, China and South Korea.



(2) Fiscal 2009 will be positioned as the year of tourism exchange with Hong Kong, and efforts will be made to expand mutual exchange in cooperation with Hong Kong's state tourism commission. In addition to use of the existing framework for bilateral discussions, such opportunities as the "Year of Japan-Danube Exchange" and "Year of Japan-Mekong Exchange" will also be used to promote bilateral tourism exchange. In June 2009, a meeting (AABFV) is scheduled to be held in the Republic of Uganda for wide-ranging discussions on measures to promote tourism in Africa between governmental and private representatives in the tourism field in Asia and Africa.

(3) It was decided that the sixth APEC meeting of tourism ministers will be held in Japan in 2010. In response to that decision, full-scale efforts will be made to sponsor the meeting.

Since the year 2009 is also the Year of Japan-Mekong Exchange, efforts will be continued to cooperate in holding workshops and other events to be held by the Japan ASEAN Center for developing sustainable tourism in countries located along the Mekong River.

## 2. Promoting Inter-regional Exchange between Japan and Other Nations

"Concerning the Outbound Measures for the Time Being" was compiled in December 2008 based on three pillars: "efforts toward facilitating the overseas travel of people," "measures designed for young people," and "promoting two-way tourism in collaboration with the Visit World Campaign (VWC) programs and other operations." Based on those pillars, the challenges to be addressed through collaboration between the government and general public will be addressed in collaboration with the stakeholders.

## Chapter 4 Paving the Way for Promoting Tourism

### **Section 1 Facilitating and Smoothing Sightseeing Trips**

1. For the purpose of reactivating the regional economy by creating and leveling the demand for domestic travel, results of the fiscal 2008 findings and other results will be used to promote and spread the use of vacation days, and pave the way for family trips and other forms of travel.

2. Regarding efforts for promoting domestic trips, stakeholders will hold a "liaison conference on promoting domestic sightseeing trips" as an opportunity for sharing information among stakeholders to promote the synergic effects of collaboration.

## **Section 2 Ensuring Safety on Sightseeing Trips**

To publish warnings segmented by municipality beginning in fiscal 2010, the arrangement of necessary systems and software will be promoted. And to prevent and alleviate the effects of disasters due to strong local winds, lightning and short-time heavy rainfall, the arrangement of necessary systems will be promoted to start providing short-time prediction information about strong winds from fiscal 2010 onward.

## **Section 3 Exploring New Fields of Sightseeing Trips**

Eco-tourism, industrial tourism and other new forms of tourism will be promoted.

## **Section 4 Preserving the Environment and Natural Scenery of Sightseeing Spots**

1. To preserve the environment by such means as controlling garbage scattered at sightseeing spots, and for other purposes as well, the 3 R's (reduce, reuse and recycle) of waste and the arrangement of waste disposal facilities will be promoted.

2. Efforts to build "regional circulation zones" in tourism will also be promoted.