

〈研究論文〉

Challenges for Regional Sustainable Tourism in Japan The Case of Kyushu

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The outbreak of COVID-19 has had a negative impact on global tourism, and Japan is no exception. However, this pandemic has also provided an opportunity for Japan's tourism industry to rethink its future development. This study examines the changes in tourism trends in Japan, with a focus on the region of Kyushu, and explores the current situation and issues facing the tourism industry in Kyushu through data from white papers, surveys, and articles from Japanese newspapers. The results indicate that brand image-building is crucial for Kyushu's tourism recovery, and it will be necessary for private organizations and government agencies to collaborate effectively. It also argues that sustainable tourism is a key factor in revitalizing the region's tourism industry.

1.Introduction

Before the early 2020 COVID-19 pandemic, Japan's tourism industry experienced significant growth in the number of international visitors over the past decade, with arrivals rising from 8 million in 2012 to 32 million in 2019. But this increase in visitors was mostly concentrated in metropolitan areas like Tokyo, Kansai, and Hokkaido, leaving a large gap between these regions and the rest of Japan, including Kyushu.

The COVID-19 pandemic has had a severe impact on the tourism industry, leading to business closures and a decline in both domestic and foreign tourism. However, the pandemic presents an opportunity for the Japanese tourism industry to rethink its future development, particularly in regional areas such as Kyushu.

To design a successful revitalization plan for Kyushu's tourism market, it is necessary to understand the changes in tourism trends during the pandemic. This study aims to examine the changes and explore the current situation and issues facing the industry in the region using data from white papers and surveys on tourism, as well as articles from Japanese domestic newspapers.

2.Tourism Trends in Japan and the Impact of the Covid-19 Pandemic

1) Tourism trends in Japan and the boom in 2019

Before the COVID-19 pandemic, the number of international visitors to Japan had surged during the preceding decade. The boom is mostly attributed

to the sharp increase in the number of inbound tourists, as the number of foreigners coming to Japan for business and other purposes has evolved much less. After relative stagnation from 2006 to 2010, Japan's inbound tourism market showed remarkable growth, especially from 2013. The total number of visitor arrivals tripled from 2013 to 2019, reaching a record of 31.88 million (2.2% more than the previous year), marking the 7th consecutive year of record high (Figure 1). As it was also the year when the new government of Prime Minister Abe started to reinvigorate tourism-oriented policies to promote the tourism industry, the growth was in line with the government's original target of attracting 60 million overseas tourists annually by 2030.

In 2019, Japan earned about 4,814 billion yen, about 46.1 billion USD, in foreign tourist expenditure from visitors to Japan, moving it to 7th place in the world, ahead of Germany and Australia. The travel and tourism sector contributed 359 billion USD to Japan's GDP, making it the world's third-largest market in this sector after the United States and China¹.

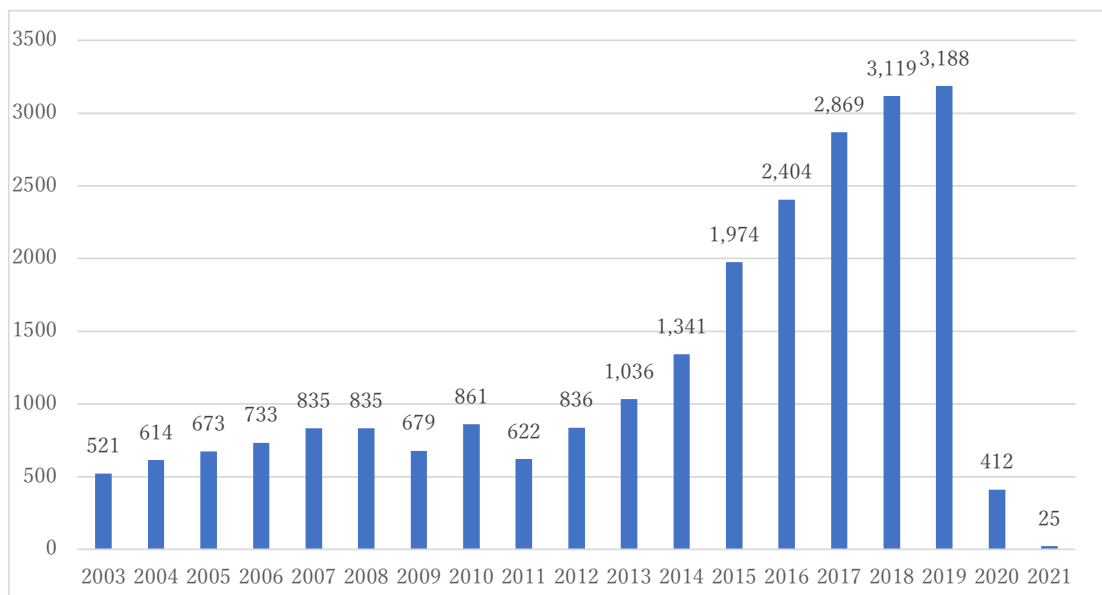
Given the exponential growth in tourism income over the period, the Japanese government recognized that inbound tourism could be an important engine of economic growth and regional revitalization. Inbound tourism is well positioned to be a core element of the Japanese government's efforts to achieve its economic GDP growth target. Beyond the monetary gains, the government is also seeking to use inbound tourism as an engine to prompt interaction and revitalize outlying areas by capturing inbound demands, thereby reinvigorating non-metropolitan areas around Japan.

But the inbound tourist boom was highly con-

centrated in certain regions as tourist hotspots within Japan. While foreign tourists have also increasingly been venturing into outlying areas, they remain highly focused on the Kanto region in and around

Tokyo, and the Osaka/Kyoto area, which is known as the Kinki region, as well as Hokkaido, and Okinawa (Figure 3).

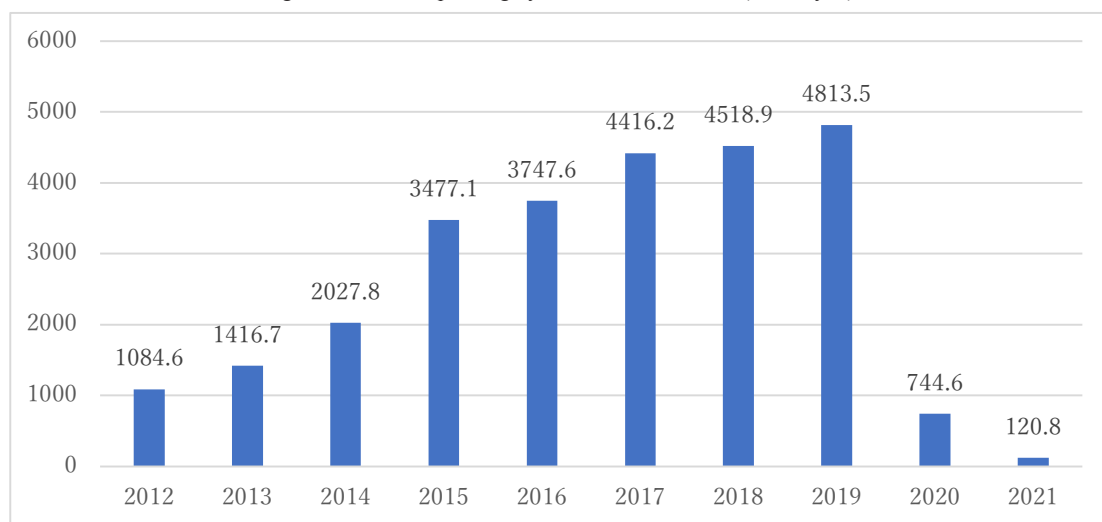
Figure 1 Number of International Visitors to Japan:2003-2021(10,000 people)



Source: Japan Tourism Agency, "White paper on tourism in Japan,2022"

<https://www.mlit.go.jp/statistics/file000008.html>

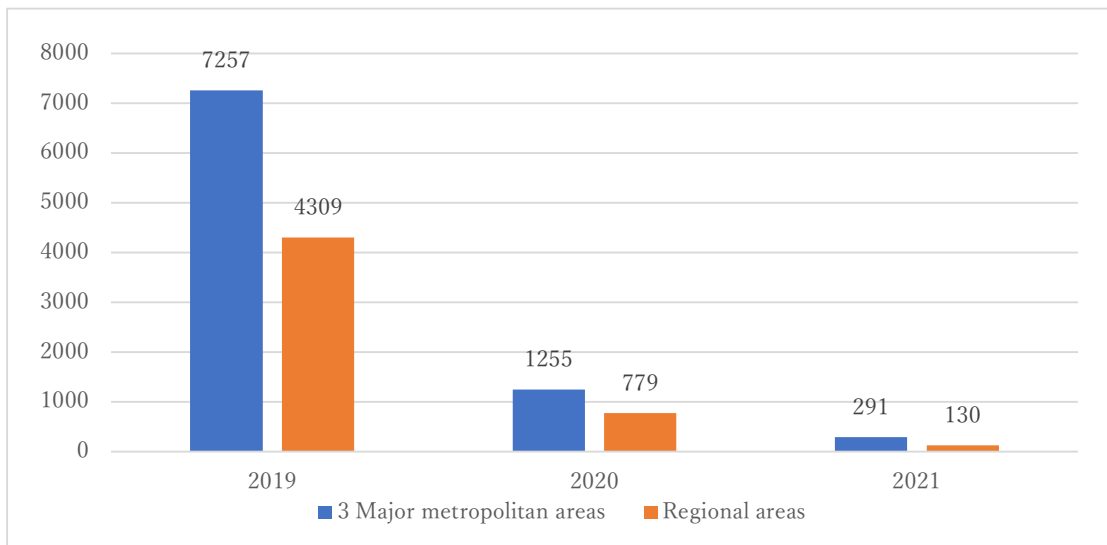
Figure 2 Tourism Spending by International Visitors (billion yen)



Source: Japan Tourism Agency, "White paper on tourism in Japan,2022"

<https://www.mlit.go.jp/statistics/file000008.html>

Figure 3 Total Number of Nights of International Visitors' stays:
In 3 Major Metropolitan Areas and Regional Areas 10,000 guest nights



Source: Japan Tourism Agency, "White paper on tourism in Japan,2022"

<https://www.mlit.go.jp/statistics/file000008.html>

(3 major metropolitan areas refers to eight prefectures: Tokyo, Kanagawa, Chiba, Saitama, Aichi, Osaka, Kyoto, and Hyogo while regional area refers to all other prefectures)

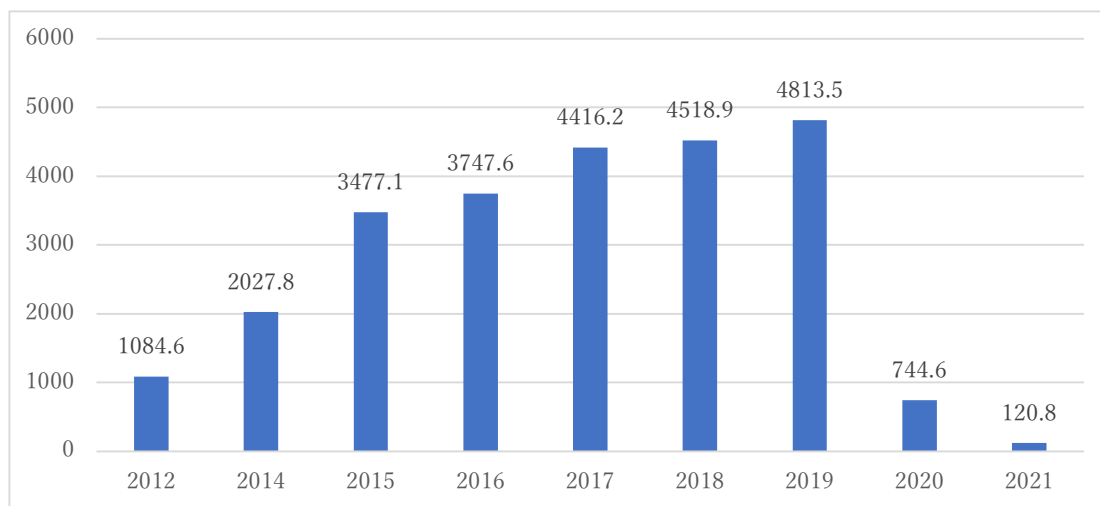
2) Impact of the Covid-19 Pandemic on the Tourism Industry

However, due to the global outbreak of COVID-19, the number of international visitors dropped sharply to 4.12 million in 2020, which is 87.1% lower than the previous year, and only 0.25 million in 2021 due to the implementation of travel restrictions.

Regarding Kyushu, the changes in the number of international visitors to the seven prefectures of Kyushu showed the same trend based on the data from the Kyushu District Transport Bureau. After

the Great East Japan Earthquake in 2011, the number of international visitors to Kyushu continued to expand rapidly, reaching a record high of 5.12 million in 2018. However, in 2020, the number of visitors plunged by 90% to 404,813, and further dropped to 6,119 in 2021, which is a 99% decrease from the previous year and the lowest figure since 2003. The sharp fall was mainly due to the entry restrictions imposed by the Japanese government and continued travel restrictions by governments around the world, in response to the COVID-19 pandemic.

Figure 4 Number of International Visitors to Kyushu: 2003-2021(ten thousand people)



Source: Kyushu District Transport Bureau, Ministry of Land, Infrastructure, Transport and Tourism

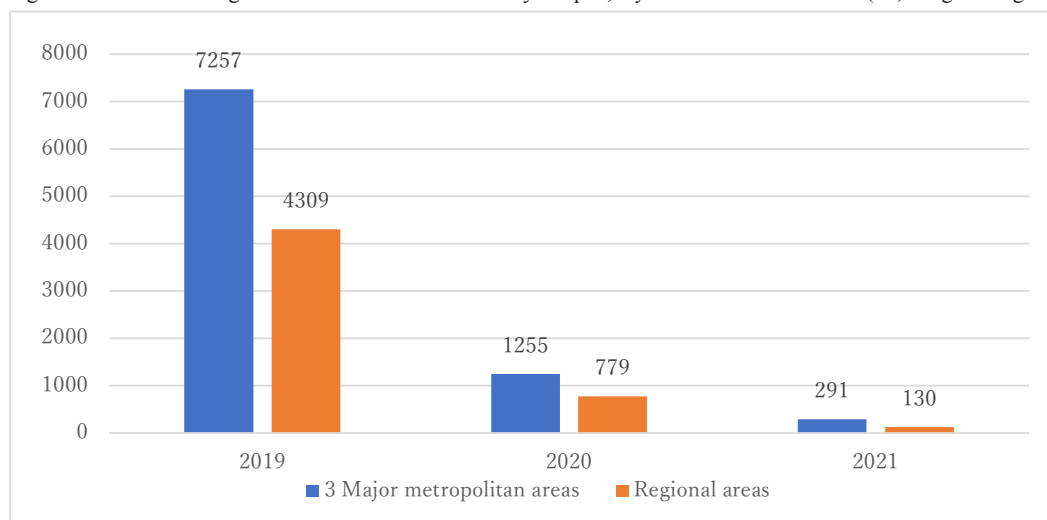
Regarding the situation before the COVID-19 pandemic, the director of the Kyushu District Transport Bureau, Mr. Toru Kawarabata, said the following in an interview with the local media:³

"The rate of international visitors from 2014 to 2019 in Fukuoka has shown a remarkable growth of 3.14 times, compared to 2.58 times

for the entire country, and 2.68 times in Kyushu.

And Fukuoka Prefecture's share of the total number of foreign overnight stays in Kyushu was 49.1% in 2019. Almost half of the foreign tourists staying in Kyushu would stay at least one night in Fukuoka Prefecture".

Figure 5 Number of Nights of International Visitors' stays: Japan, Kyushu Area and Fukuoka (10,000 guest nights)



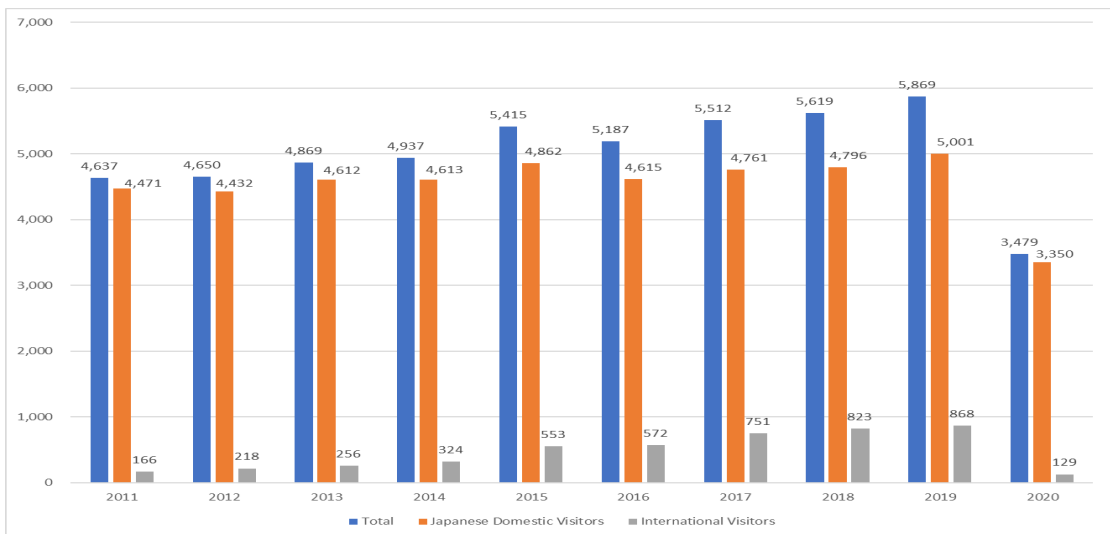
Source: Kyushu District Transport Bureau, Ministry of Land, Infrastructure, Transport and Tourism

Nationwide, most international visitors to Japan are from China and Taiwan. However Fukuoka is unique in having a large number of visitors from South Korea (35.2% in 2019), due to geographical proximity and low cost carrier (LCC) operations.

A summary by the Kyushu District Transport Bureau shows that the total number of domestic overnight trips in the seven prefectures of Kyushu was 33.5 million in 2020, a decrease of 33% from 2019. And international overnight trips were 1 million in 2020, down 85% from 8.6 million in 2019⁴.

According to the Kyushu District Transport Bureau, the number of overnight trips in Kyushu in the period from January to October 2021 was down 6.2% from the same period previous year. Due to the "prefectural discount" program (regional tourism business support) in each prefecture of Kyushu, a rise in the number of overnight trips could be seen from March to August 2021, but it declined again in September because of the declaration of a state of emergency.

Figure 6 Number of International and Domestic Overnight Trips in Kyushu: 2011-2020 (10,000 people)

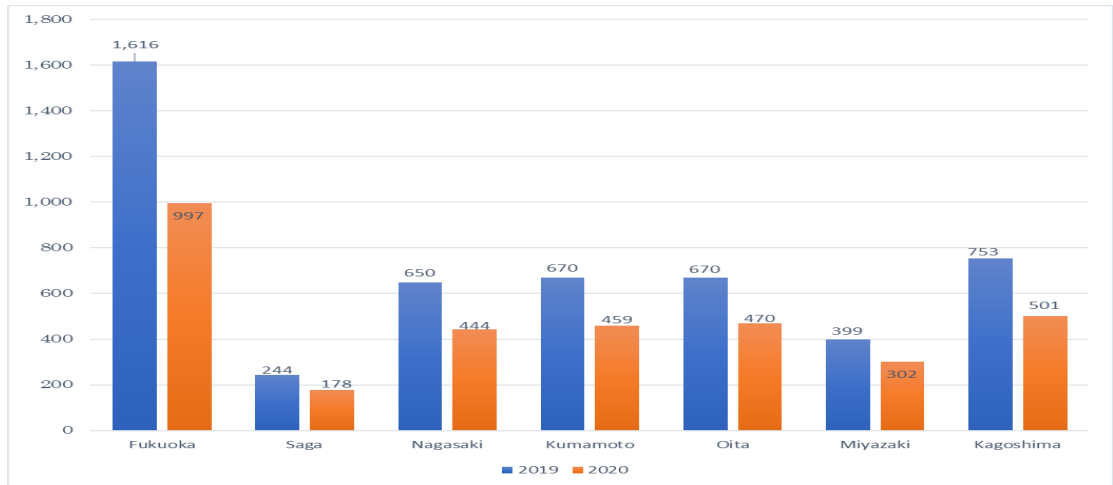


Source: Kyushu District Transport Bureau, Ministry of Land, Infrastructure, Transport and Tourism

As shown in Figure 7 comparing 2019 and 2020 by prefecture, Fukuoka Prefecture saw the largest decline of 38.3%, while the others fell between 24-33%. A recovery trend was seen with

the launch of the "Go To Travel Campaign", which started in July 2020, but it has fallen again since the suspension of the campaign in December 2020.

Figure 7 Domestic Overnight Trips in Kyushu in 2019 and 2020 by Prefecture (10,000 people)



Source: Kyushu District Transport Bureau, Ministry of Land, Infrastructure, Transport and Tourism

3. Changes in Tourism Trends after the Covid-19 Pandemic

1) Birth of a New Style of Travel: "Micro-tourism"

Travel restrictions continue to make it difficult to travel too far from home, which has led to the birth of a new style of travel in Japan, called "Micro-tourism". This refers to sightseeing and overnight travel within an hour or two of home, meaning people explore the local area rather than travelling long distances to the destination. Micro-tourism was proposed by Mr. Yoshiharu Hoshino, CEO of Hoshino Resort, as an innovative measure to be taken by the tourism industry, and has become a new form of tourism for the post-pandemic era.

According to the Japan Travel Bureau Foundation, travel within regional blocks has increased significantly in Hokkaido, Tohoku and other

regional blocks. "Micro-tourism" has become mainstream amid the self-imposed recommendations against travelling across prefectural borders⁵. This small-scale style of travel has seen an uptick across the country, given impetus by the "Go To Travel Campaign", as well as discount campaigns for prefectural residents as tourism promotion measures. It also enhances collaboration among nationwide and regional companies, and local experts.

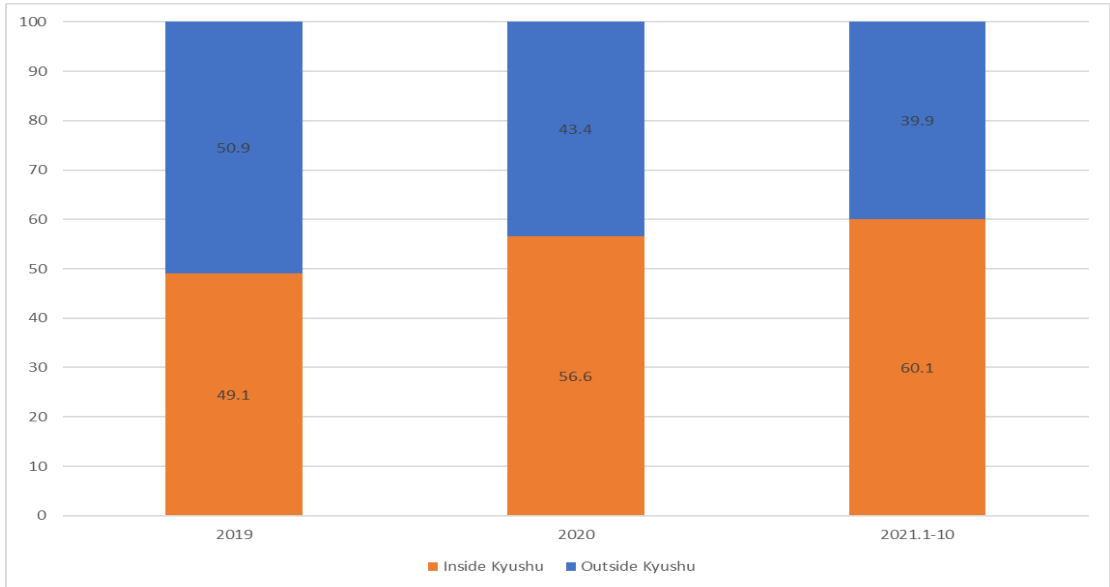
As for Kyushu, looking at the places of residence of Japanese people who stayed in Kyushu, we can see that in 2019, before the COVID-19 pandemic, there was an almost 50/50 split between travel inside and outside Kyushu. But since the spread of the COVID-19, the proportion of travel inside Kyushu has increased. According to a report by Kyushu District Transport Bureau, "micro-tourism", which allows tourists to enjoy sightseeing in the local vicinity, is spreading.

From Jan. 2021 to Oct. 2021, Miyazaki had the

highest percentage of local overnight trips in the Kyushu region, 81.5%, while in Oita and Saga locals accounted for 72.8% and 72.1% respectively. In

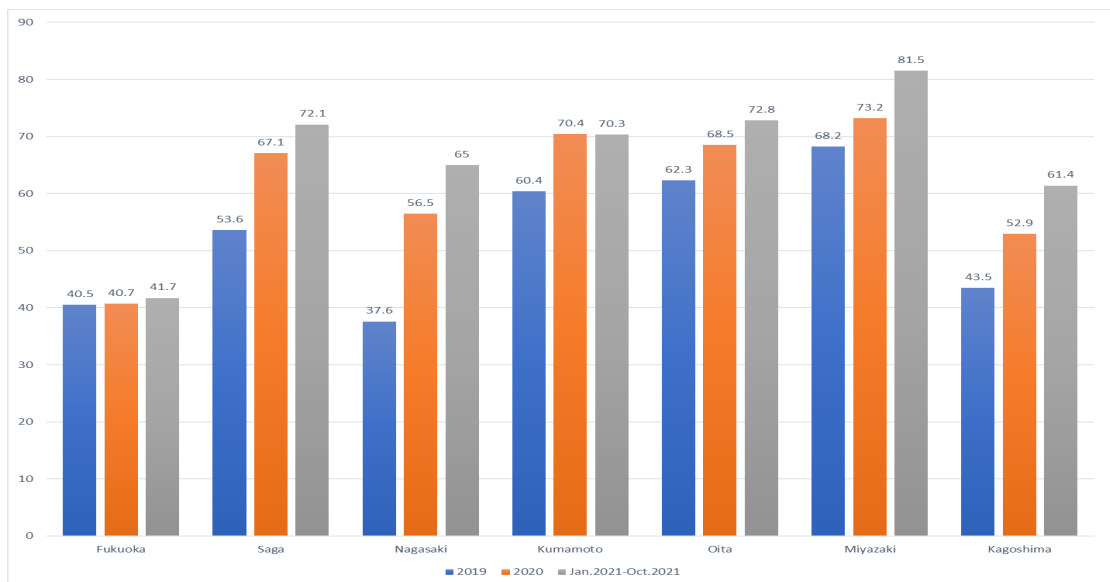
terms of growth compared to 2019, the local overnight stays in Nagasaki increased by 27.4 percentage points, and Saga by 18.5 percentage points.

Figure 8 Ratio of local Tourists Taking Overnight Trips in Kyushu by prefecture (%)



Source: Kyushu District Transport Bureau, Ministry of Land, Infrastructure, Transport and Tourism

Figure 9 Ratio of Domestic Tourists Taking Overnight Trips in Kyushu by prefecture (%)



Source: Kyushu District Transport Bureau, Ministry of Land, Infrastructure, Transport and Tourism

According to the Nishi-Nippon Shimbun, "micro-tourism" is spreading due to restrictions on overseas travel as well as discount campaigns for prefectural residents in tourism promotion measures.⁶

Yoshiharu Hoshino, CEO of Hoshino Resorts (based on Karuizawa Town, Nagano Prefecture), told the Nishi-Nippon Shimbun the following⁷:

"Japan has lost inbound (international visitors to Japan) spending, but the overseas travel market has returned to domestic travel. It was a good opportunity to experience "micro-tourism" and supported the business.

Regarding "micro-tourism", he stated that the expected effects were not achieved in the big cities of Tokyo, Kansai, and Okinawa, but "Kyushu was the easiest place to do." "The number of people in Kyushu who stayed at "Kai Aso" in Kokonoe Town, Oita Prefecture in the summer was about 30% in 2019 before pandemic of COVID-19, but it grew to about 40-60 % in 2020 and 2021."⁸

2) Remote Work and Vacation

With remote work being promoted, "Workcation" and "Bleisure" emerged as the top travel trends for 2021.

Workcation, according to the Tourism Agency, refers to working while enjoy leisure time in a different location from the usual workplace, such as resort areas, hot springs, and national parks⁹. Bleisure refers to travel which combines elements of both business and leisure. It typically takes the form of business travelers extending the duration of the trip to enjoy leisure activities.

The move builds on the spread of remote work and an increase in travelers choosing to go to the

countryside amid the COVID-19 pandemic. Many companies embraced workcation and the government is promoting it as a contributor to work style reform and travel demand equalization, but labor management and the need to ensure educational opportunities for children are issues.

It is likely to spread to a certain extent if companies become more aware of the fact that workcation is effective as a work style from the perspective of business continuity plans, and that it contributes to improving employee productivity and extending life expectancy and quality of life. According to the Nihon Keizai Shimbun, the Council of Workcation Municipalities was established in November 2019. Goto City, in Nagasaki Prefecture started an island living experience program in 2019. The city prepared an office with a well-equipped communication environment, childcare services, sightseeing tours, and other facilities. The program is designed for people to stay for 3 to 9 nights.

3) Sustainable Tourism in Japan

The rapid expansion of global tourism in recent years has coincided with growing concern in many countries over its impact on the environment and on the lives of those living and working in popular tourist destinations. The emergence of the COVID-19 pandemic has heightened these concerns.

The Sustainable Development Goals (SDGs) were adopted in 2015, and the UN's World Tourism Organization has accordingly called for 'sustainable tourism', defining this as "tourism that meets the needs of visitors, industry, the environment and the host community, while taking into account the environmental, socio-cultural and economic impacts for the present and the future"¹⁰. Sustainable develop-

ment and sustainable tourism were quite new concepts for Japan. Prior to the pandemic, the huge increase in the number of international visitors to Japan was starting to sound alarm bells, with many people lamenting overcrowding, pollution, and the resulting burden on local residents and communities. Sustainable tourism was meant to solve the problems of congestion, etiquette violations, and other nature conservation and cultural conservation issues.¹¹

"Japan is taking concrete steps to support these global targets. The Japan National Tourism Organization (JNTO) has accordingly formulated policies aimed at promoting sustainable tourism in Japan that will contribute to achievement of the SDGs.

The management concept of JNTO includes "the development of the national economy through inbound tourism", "the revitalization of local communities", "the promotion of international mutual understanding", and "the enhancement of Japan's branding power"¹².

JNTO's sustainable tourism embodies the following goals:

①Protecting and nurturing local environments and their biodiversity

This is about contributing to the preservation of nature and biodiversity by disseminating information on examples of how environmental resources are optimally used for tourism, such as tourism content that takes into account environmental impact.

②Respecting and preserving local culture

This refers to contributing to the preservation and transmission of the tangible and intangible traditional and cultural assets of the region that Japan has nurtured since ancient times, while

providing them to overseas visitors in an attractive form and allowing them to experience them through foreign tourism.

③Supporting local economies

The aim is to attract and retain a steady stream of international visitors to all regions of Japan, without being biased toward any particular region or time of year, and to stimulate local economies by promoting local experiences and the purchase of local products so as to create stable, long-term employment and make the region a good place to live and a good place to visit.

According to Yomiuri Shimbun, Green Destinations, the world's leading destinations network for responsible tourism, selects regions that meet its core criteria and features advanced sustainability stories selected by a panel of experts each year.¹³Six regions from Japan were selected in 2020 and 12 in 2021, and Aso City was one of them. It was selected in recognition of its multi-tiered support system by a diverse group of stakeholders for the maintenance of grasslands and the return of profits through grasslands activities from appropriate compensation received from tourists.

From what we have discussed, we can see that travel styles are greatly affected by infection prevention measures. Family trips with a small number of people, avoiding contact with the general public, traveling to nature-rich areas and hot spring areas by private car, and enjoying private room stays at small accommodation facilities or in nature have become mainstream.

Eradication of a virus is difficult, and it is

thought that this travel tendency will continue and take root in the future. In particular, for trips aimed at enjoying the outdoors and nature, sustainable tourism is welcomed by most travelers. Tourists are becoming more aware of the need to protect and sustain resources in the place they visit. Various forms are being developed, and the options for enjoyment are expected to increase and become firmly established.

4. Current Situation and Issues Facing Tourism in Kyushu

1) Enhancing the recognition of Kyushu using unified branding

Kyushu is one of the four main islands of Japan, located in the most southwestern part of the country. It is an area blessed with a warmer climate, and has a wide range of attractions for tourists, such as active volcanoes and hot springs with the highest volume of hot spring water output in Japan. However, when looking at Kyushu as one destination, it is less popular to Tokyo, or Kyoto, even Hokkaido or Okinawa. Japan's tourism data shows that travelers from the European, North American, and Australian markets tend to stay longer and spend more per days than visitors from other overseas regions. However, these travelers tend not to travel as far south as Kyushu.

Many of the sightseeing spots were featured on the legacy site, but with images and translated text that lacked focus and appeal. The Kyushu Tourism Promotion Organization was established in April 2005 as an implementation organization for the "Kyushu tourism strategy" formulated by the Kyushu Regional Strategy Council, consisting of the

Kyushu regional Governors' association, the Kyushu Economic Federation, the Kyushu Federation of Chambers of Commerce and Industry, the Kyushu Association of Corporate Executives, and the Kyushu Employers' Association. The philosophy of the association is to try to create a new unified branding strategy for Kyushu. The "One Kyushu Project" is the key concept.

The brand ties seven diverse prefectures together through volcanic power and geothermal energy, Kyushu's history as a center of international exchange, and the fertile fields and abundant waters that shape this island's cuisine. The second stage of "Kyushu Tourism Strategy" was formulated to increase awareness of the Kyushu brand and enhance the recognition of Kyushu's brand, particularly in East Asia. Since Kyushu has the largest number of hot springs in Japan, in terms of the number of sources and the volume of hot springs gushing out, hot springs have been identified as a focal image in Kyushu's branding campaign.

However, challenges still exist. How to create a clear image of Kyushu, and to promote a country-specific image through various channels are the issues. According to the Nishi-Nippon Shimbun, Yoshiraru Hoshino, CEO of Hoshino Resort, talked about Kyushu as a tourist destination .

"Kyushu is an extremely attractive place. For example, shochu made in Kyushu is very popular in Tokyo's izakaya (Japanese-style pubs), and it is said to be Japanese whiskey. From the world's point of view, Kyushu is seen as one cultural sphere, a different Japanese culture other than that of Tokyo and Kyoto...

But travelers don't think of Kyushu prefecture by prefecture. Yet, the tourism strategy is for

each of the seven prefectures. None of the prefectures has a sufficient budget, and as a result, they haven't become world-class tourist destination brands. Despite the potential, the seven prefectures are unable to focus on a single brand. The ideal strategy for Kyushu as a whole would be to become one. This is a very difficult task given the current framework in Japan, but we need to concentrate budget and authority, and come up with a clear strategy."

2) Development of Tourism Resources and Information Transmission Capacity

There are a great abundance of World heritage sites in Kyushu:

- ①Yakushima Island (Kagoshima Prefecture) Natural Heritage site
- ②Site of Japan's Meiji Industrial Revolution: Iron and Steel Making, Shipbuilding, and Coal Industry (Fukuoka, Saga, Nagasaki, Kumamoto, Kagoshima, Yamaguchi, Iwate, and Shizuoka Prefectures) Cultural Heritage
- ③Munakata/Okinoshima Island and Related Properties (Fukuoka Prefecture) Cultural Heritage
- ④Nagasaki and Amakusa Region Latent Christian Related Heritage (Nagasaki and Kumamoto Prefectures) Cultural Heritage
- ⑤Amami oshima, Tokunoshima, Northern Okinawa Island and Iriomote Island (Kagoshima and Okinawa Prefectures) Natural Heritage

In fact, Kyushu has fascinating tourism resources including history, culture, hot springs, nature, volcanoes, and delicious food. It is necessary to combine all of these elements and aim for more effective information dissemination both domesti-

cally and internationally. This includes not only the information from tourist destinations, but also the information shared by visitors to the area through social media or other channels to attract more tourists.

Conclusion

Building a strong Kyushu brand image is crucial to increase inbound tourism. The region has many natural and cultural assets that extend beyond the major urban areas, and unified branding can ensure that tourists worldwide have greater awareness of all that Kyushu has to offer. The tourism industry can flourish if the public and private sectors work together to deliver a great experience for visitors.

Furthermore, sustainable tourism will play a significant role in the recovery of tourism. In May 2020, a new law was enacted to promote tourism and deepen understanding of local culture, with a particular focus on upholding and revitalizing ancient traditions and cultures in regional areas. These are threatened due to depopulation, and the new law calls on facilities such as museums to offer visitors more insights into the cultural and historical background of their exhibits in an accessible and easy-to-understand manner. The aim is to make Japanese culture more accessible to overseas tourists, boost awareness of the culture of regional areas among residents, deepen their attachment to them, and promote regional revitalization.

Annotation

- 1 Jetro "Japan's tourism market expected to grow again post-corona" https://www.jetro.go.jp/en/invest/attractive_sectors/tourism/overview.html (accessed on April 12,2022)
- 2 Kyushu District Transport Bureau, "Number of Foreign Entrants to Kyushu." On January 25, 2022 <https://www.ttb.mlit.go.jp/kyushu/content/000257290.pdf> (accessed on February 20, 2022)
- 3 Fukuripa, October 15, 2021, "New Travel in the Age of with Corona, the Future of Fukuoka/Kyushu Tourism: Interview with Toru Kawarabata, Director General, Kyushu Transport Bureau. <https://fukuoka-leapup.jp/biz/202110.354> (accessed on February 13, 2022)
- 4 Kyushu District Transport Bureau, "Impact of New Coronavirus Infections on Public Transport and Tourism Operators in Kyushu." <https://www.ttb.mlit.go.jp/kyushu/content/000257312.pdf> (accessed on February 13, 2022)
- 5 Japan Travel Bureau Foundation, Gallery Project, Trends of new coronavirus infectious diseases and Japanese travelers, 2021. the results of the JTBF's analysis of two regular surveys, the Travel Awareness Survey and the Travel Field Survey, or example, Hokkaido, where the percentage of travel within the regional block was high at 53.8% as of the August 2019 survey, nearly 100% responded that travel within Hokkaido was largely unchanged in 2020 survey. Similarly, in Tohoku it changed from 53.0% to 75.0%. In Kyushu/Okinawa, it changed from 58.8% to 81.8%, and in Kanto, which was a large-scale customer market nationwide, it changed from 25.9% to 51.6%.
- 6 The Nishi-Nippon Shimbun, October 7, 2021, "60% of Kyushu overnight visitors are within the region in the first half of 2009, Kyushu Transport Bureau analysis, under Corona, 'familiar travel' spreads" <https://www.nishinippon.co.jp/item/n/812142/> (accessed on February 13, 2022)
- 7 Nishi-Nippon Shimbun, December 27, 2021, "'New Year's Eve and New Year's Travels Nearby Are Doing Well,' Interview with Hoshino Resort Representative on Current State of Tourism." <https://www.nishinippon.co.jp/item/n/848560/> (accessed on February 13, 2022)
- 8 *ibid*
- 9 The official website of the Japan Tourism Agency, "New Styles of Travel," <https://www.mlit.go.jp/kankochoworkation-bleisure/> (accessed on February 24, 2022)
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- Country, June 12,2019, www.mlit.go.jp/common/001293010.pdf (accessed on February 24, 2022)
- 12 Japan Tourism Agency, June 22, 2021, "Contribution to the SDGs and the Promotion of Sustainable Tourism (Sustainable Tourism)." https://www.jnto.go.jp/jpn/news/press_releases/20210622.pdf (accessed on February 24, 2022)
 - 13 The Yomiuri Shimbun, October 19, 2021, "Aso City among the World's 100 Most Sustainable Tourist Destinations." <https://www.yomiuri.co.jp/local/kumamoto/news/20211018-OYTNT50059/> (accessed on February 25, 2022)
 - 14 Nishi-Nippon Shimbun, December 17,2021, "Branding Lags Behind, Strategy Needed for Kyushu Tourism"

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